



TOOLS:
OPPORTUNITIES
AUTOMATIONS
WORKFLOWS
REPORTS

Observation: Every growing business needs to be fostering new leads to thrive. By leveraging the tools within your Redtail CRM, you can make prospecting less strenuous and time consuming.

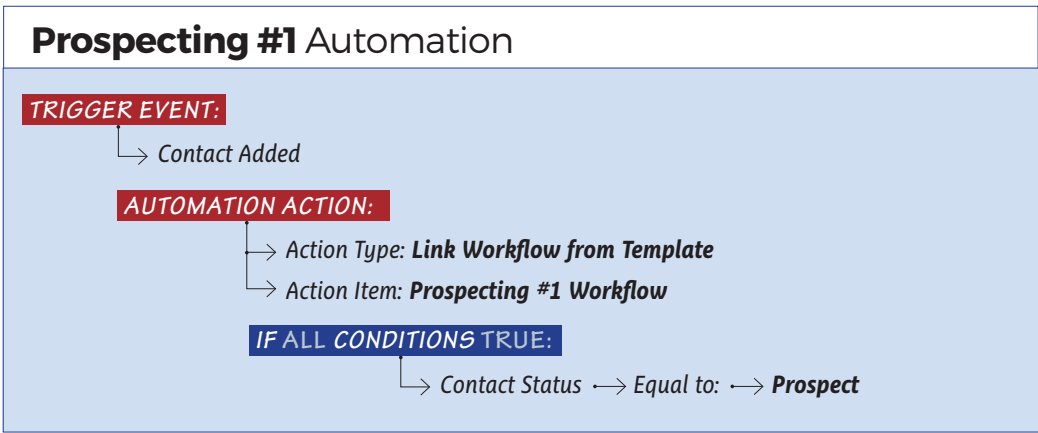
Directions:

1. Define your sales process. Who is a Lead vs. Prospect? Use Statuses and Categories to define where a contact is within your sales cycle. Add the new Statuses and Categories to your database.
[MANAGE YOUR ACCOUNT > MANAGE DATABASE LISTS > ADD](#)
 2. Where do new business opportunities come from? (ex. CPA Referrals, Retirement Planning Seminar, LinkedIn). Add these to the database Source list.
[MANAGE YOUR ACCOUNT > MANAGE DATABASE LISTS > SOURCE > ADD](#)
 3. Whiteboard with your team how prospects and leads should be reached out to. Create a workflow in Redtail with an ideal prospecting process. Check out the included example for a good starting point.
[MANAGE YOUR ACCOUNT > WORKFLOW TEMPLATES > NEW](#)
 4. Determine changes in the database that should initiate prospecting workflows. Add automations that link workflows based on contacts or activities being added, or contact status changing.
[MANAGE YOUR ACCOUNT > AUTOMATION TEMPLATES](#)
 5. Open Opportunities based on prospects being qualified. Redtail recommends only opening an opportunity once there is an amount determined that the office will gain from the relationship.
[OPPORTUNITIES > NEW OPPORTUNITY](#)
 6. Report on opportunities and prospects.
 - a. Opportunities by Stage Report
[REPORTS > OPPORTUNITY REPORTS > OPPORTUNITY BY STAGE > FILTER](#)
 - b. Workflow Task Report
[REPORTS > WORKFLOW REPORTS > WORKFLOW TASK REPORT > FILTER](#)
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Result: Defined processes for prospecting gives your sales team guidelines and accountability when finding new clients for your business. Overestimate the amount of touches in your prospecting process. It is not unusual for 5 or more touches to be necessary before a client decides to sign on.

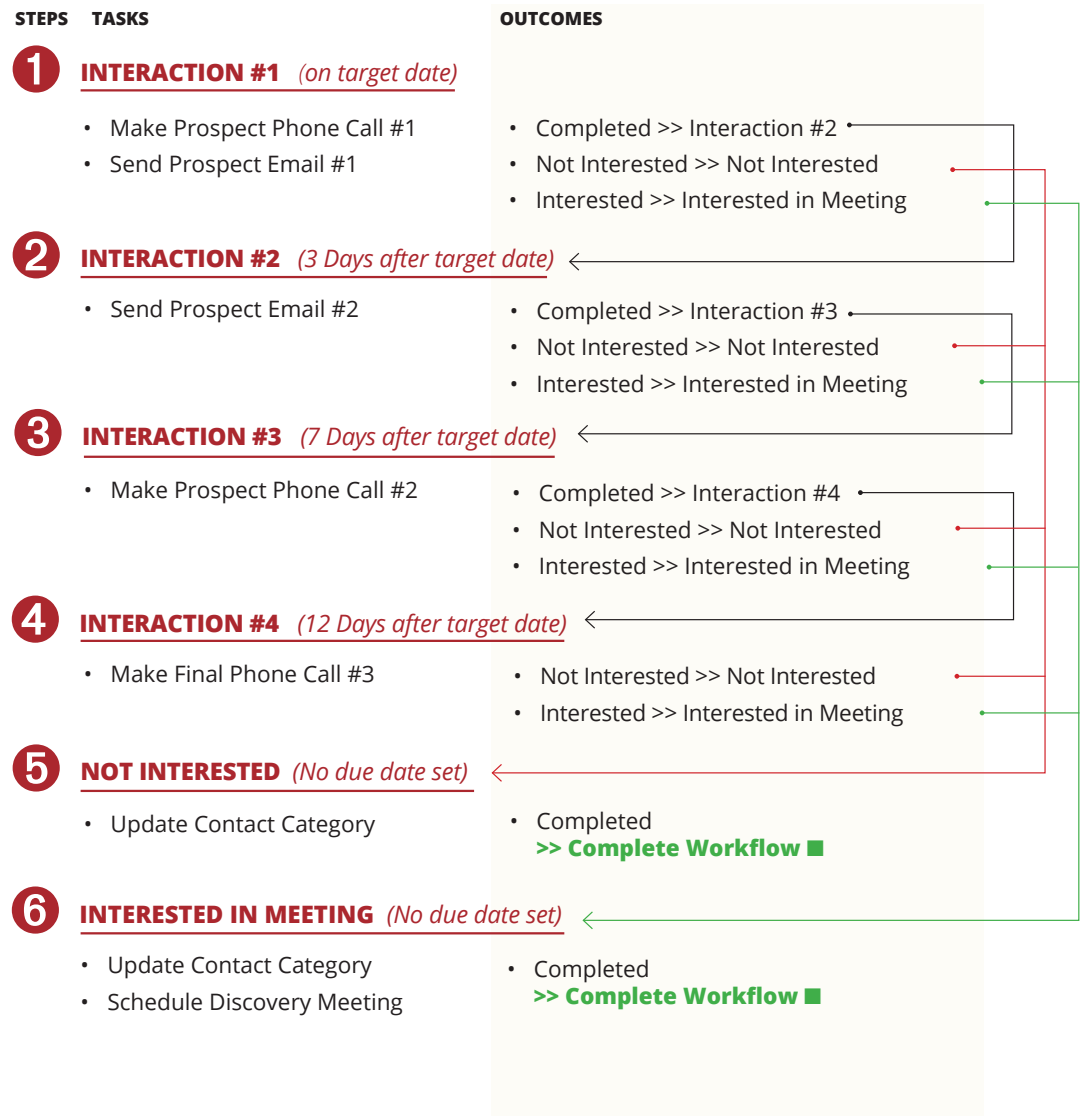
Helpdesk Link:

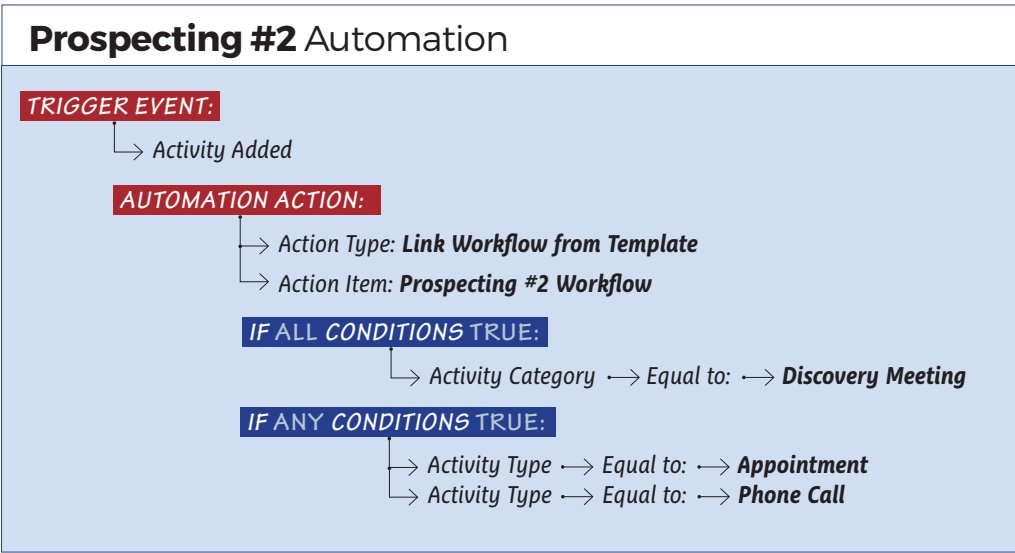
<http://bit.ly/howtoRTU>



Prospecting #1 Workflow

***Recommended to use with Automations**
 Target date = Date Workflow is created





Prospecting #2 Workflow

***Recommended to use with Automations**
 Target date = Date of prospect meeting

STEPS	TASKS	OUTCOMES
1	HAVE DISCOVERY MEETING <i>(on target date)</i>	<ul style="list-style-type: none"> Completed >> Follow Up #1 Not Interested >> Not Interested Interested >> Interested
2	FOLLOW UP #1 <i>(on target date)</i>	<ul style="list-style-type: none"> Send Follow Up Email #1 Completed >> Follow up #2 Not Interested >> Not Interested Interested >> Interested
3	FOLLOW UP #2 <i>(3 Days after target date)</i>	<ul style="list-style-type: none"> Make Follow Up Phone Call #1 Completed >> Follow up #3 Not Interested >> Not Interested Interested >> Interested
4	FOLLOW UP #3 <i>(7 Days after target date)</i>	<ul style="list-style-type: none"> Make Follow Up Phone Call #2 Completed >> Follow up #4 Not Interested >> Not Interested Interested >> Interested
5	FOLLOW UP #4 <i>(12 Days after target date)</i>	<ul style="list-style-type: none"> Send Follow Up Email #2 Not Interested >> Not Interested Interested >> Interested
6	NOT INTERESTED <i>(No due date set)</i>	<ul style="list-style-type: none"> Update Contact Category Completed >> Complete Workflow ■
7	INTERESTED <i>(No due date set)</i>	<ul style="list-style-type: none"> Update Contact Status Update Contact Category Schedule Onboarding Meeting Completed >> Complete Workflow ■

**All of Redtail's best practice recommendations in these "How to Handle" documents are intended to provide a starting point for each office or database to develop their own processes from. These are not intended to comprehensively represent industry standards or compliance requirements. Terminology used in the examples may vary depending on the Database Lists, Templates, and other personalizations unique to each database.*