How to Create and Maintain a Prospect

Description

Use this function to create and maintain a Prospect in the system. The Prospect file contains contact information, discovery questions, and other information related to the Prospect. Tasks and tours will be recorded on the Prospect file as well. A Prospect file must be created before a Resident can be moved in to your Community.

What you will need before entering a Prospect (the following fields are mandatory):

- Inquirer First Name
- Inquirer Last Name
- Initial Contact Date
- Type of Inquiry
- Prospect Status
- At least one Referral Source (*Marketing Event, Advertisement, Contact, Resident, Employee, Other*)

The system will:

- Create a Prospect record

Step by Step

1 Search the Prospect's name before entering a new prospect to make sure they are not already in the system.

2 On your Homepage, click **Create New** and select *Prospect*. Alternatively, on the Prospect Tab, click **New**.
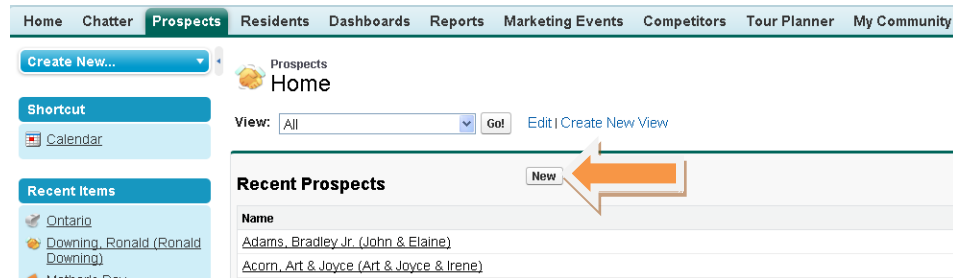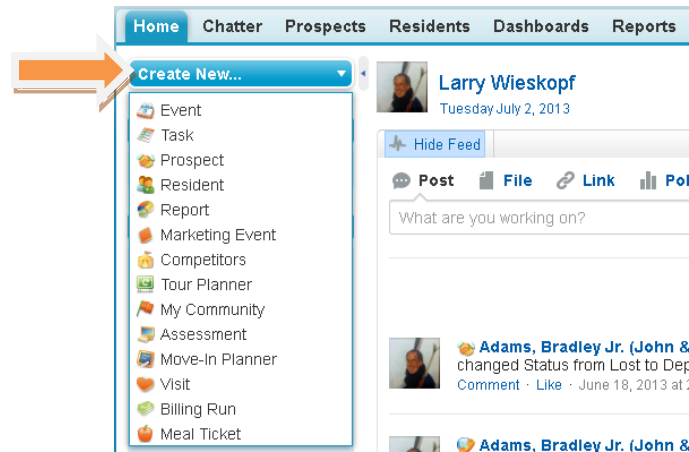
General

1 Under **Name**, enter a *period (.)*. The system will combine the Inquirer's name followed by the Prospect's name in brackets. For example, if the Inquirer is Jonathan Smith and the Prospect is Mary Philips, the name will appear as:

Smith, Jonathan (Mary Philips)

If there are two Prospects, both first names will appear in brackets:

Smith, Jonathan (Joe & Mary)

2 Enter **Inquirer First Name**

3 Enter **Inquirer Last Name**

4 Enter other contact information you may have for the Inquirer, such as their phone number and email address

Updated: June 6, 2014

5 Most users do not need to specify a **Community**, as you are set up to automatically default to your Community upon clicking Save. However, if you work with Prospects from more than one Community, specify the **Community**.

6 Specify an **Initial Contact Date**

7 Select **Type of Inquiry**

8 Select **Prospect Status**

9 To comply with CASL, specify the **Email Consent Date**

10 Select how the **Email Consent was Given**

▼ General

Name	Alison, Ali (Ali Alison)	Community	AutoPostTesting
Inquirer First Name	Ali	Initial Contact Date	6/3/2014
Inquirer Last Name	Alison	Type of Inquiry	Phone Call
Inquirer's Prefix		Prospect Status	Temporary
Inquirer's Phone 1		Status	Trial Conversion
Inquirer Phone Source 1		1st Tour Date	
Inquirer's Email		2nd Tour Date	
Relationship to Prospect			
Email Consent Date	6/3/2014		
Email Consent Given	Over the phone		Ac

Advertisement and Referral

1 Choose a **Primary Referral Type** if you will be entering multiple Referral Types

2 Specify the appropriate **Lead Source** or **Referral**. This could be an **Advertisement, Marketing Event, Contact** (Outreach), or **Resident**. You may enter more than one **Lead Source** or **Referral**.

To see a list of Advertisements your Community has entered in the system, click on **Advertisement Lookup** on your Sidebar Quick Links:

Quick Access

Retirement Home Software
USPS
411.com
Advertisement Lookup
Quick Prospect
Wait List Report
Go To Manage
EZ Labels
Evacuation Report

Advertisement and Referral (You must enter atleast one traffic source)

Primary Referral Type	Resident	Referred by Contact	
Advertisement		Referred by Resident	R-13089
Marketing Event	Winterfest	Referred by - Other	

Discovery Questions

❚ The discovery questions help guide the sales process. They include relationship building and decision making questions, as well as questions about the Prospect's urgency in finding a Retirement Community. The edit screen can be returned to at any time when more information is received about the Prospect.

Relationship Building

What would you like to accomplish?

What is your situation?

Fraternal Connections   Available: Mason, Eastern Star, Other

Decision Making

Who else is involved in this process?

Who will be making the final decision?

Urgency

How long have you been in the situation?

Hot Buttons

❚ Hot buttons allow you to enter information about the Prospect's desired **Suite, Suite Type, Program,** and **Interests**

Situation

1 This section allows you to enter information about the Prospect's **Health, Cultural Background, Mobility,** and **Living Situation**

2 In **Mailing Instructions**, select the appropriate mailing label instructions for this Inquirer and Prospect (choose from *Inquirer, Prospect, Both,* or *Do Not Mail)*. The Mailing Label program will use this to sort the labels.
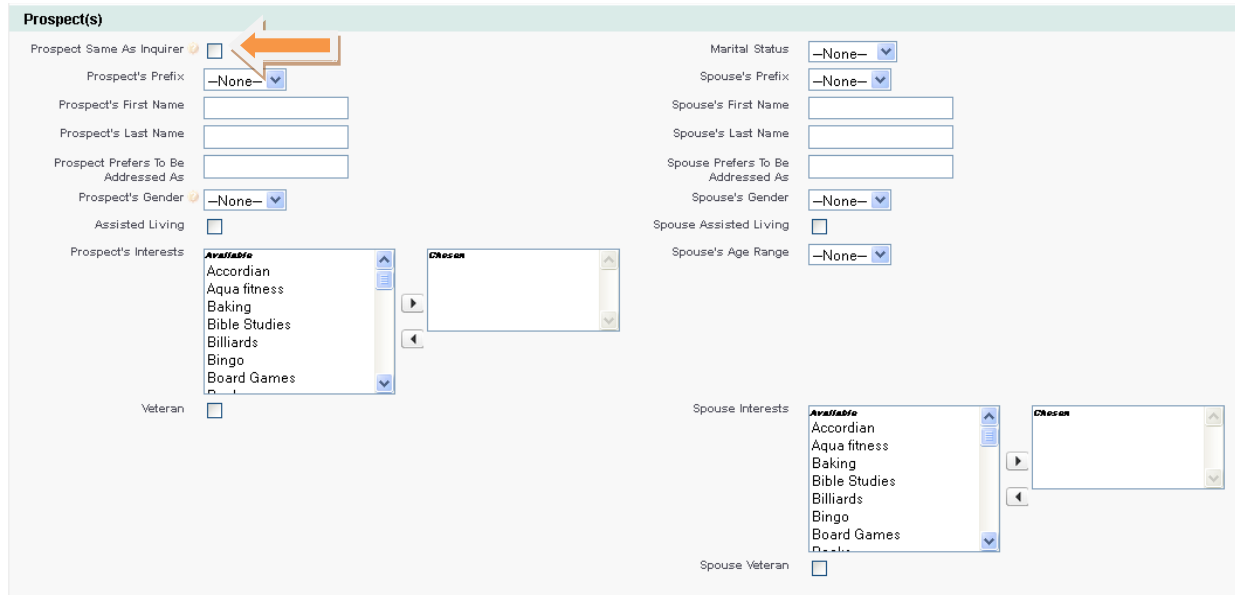
Prospect(s)

1 If the Prospect is the person inquiring, you do not have to reenter their name and address in the Prospect(s) section. Simply check off **Prospect Same As Inquirer**, and it will auto-populate when you save.

2 Verify your data and click **Save.**

Updated: June 6, 2014

Note: The screen shots represent the standard iaRetirement Home Software screens. Your actual screens may be slightly different.

Referral Management

At the top of the Prospect screen, you will find a button called Referrals. This button allows you to record Resident or Contact referral fees as well as the date the referral fee was paid

▼ Prospect

Prospect's Prefix	
Prospect's First Name	Jon
Prospect's Last Name	Adams
Spouse's Prefix	
Spouse's First Name	Elaine
Spouse's Last Name	Adams
Community	iaRetirement - GTA
Status	Deposit

▼ Please Complete This Section To Record Referral Fees

Resident	R-21118
Referred by Resident Name	Paul Paulson
Resident Referral Fee	[ ]
Date Resident Referral Fee was Paid	[ ] [5/15/2014]
Contact	Tim Barr
Contact Referral Fee	[ ]
Date Contact Referral Fee was Paid	[ ] [5/15/2014]

Save   Cancel

Related Lists

The following lists can be found at the bottom of the Prospect file:

Open Activities – Tasks and Events scheduled for this Prospect, such as phone calls and tour dates

Activity History – Click the View All button to see a detailed list of past Tasks and Events

Comments related to activities can be recorded in the activity notes. Discussions related to discovery questions should be recorded on the Prospect file for easy access.

Marketing Events Attended – These are events attended by the Prospect after their initial contact with your Retirement Community

Updated: June 6, 2014

Tour Planner – The Tour Planner can be used to make specific tour arrangements or plans, including dates and tour highlights

Move-In Planner – The MIP is a coordination tool used when a Prospect plans to move in to your Community. The MIP is the handoff between the Sales team and the Resident Lifestyle and Operations teams. A Prospect may have several MIP's, as one is created with each move-in (for example, a Prospect with several respite stays would have an MIP for each stay). When a temporary Resident converts to permanent, a new MIP is created (please refer to the How To document entitled *How to Convert a Temporary Resident to Permanent*).

Notes & Attachments – Additional notes (not related to discovery questions) and attachments can be stored in this section of the Prospect's profile page

Resident Transactions – Transactions such as waitlist and move-in deposits will be recorded in this section

Waitlist Management – This list shows if the Prospect has been waitlisted using the Create Wait List button at the top of the Prospect's profile page.

Prospect Competitors – Record competitors being considered by the Prospect during the sales cycle

Prospect Relatives – Enter contact information for Prospect relatives involved in the sales process or in the Prospect's care

Incident Management – Record any incidents that occur during the sales process, such as a fall