







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):

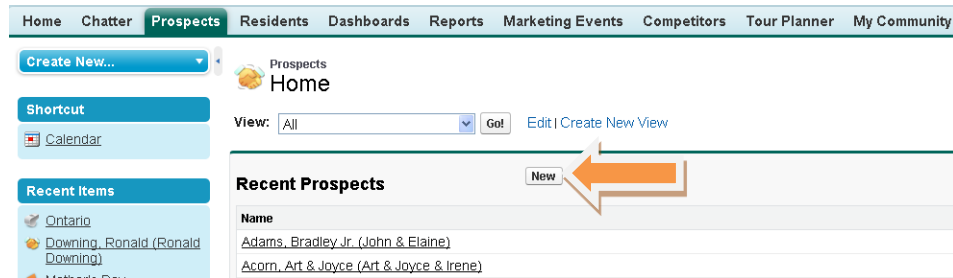
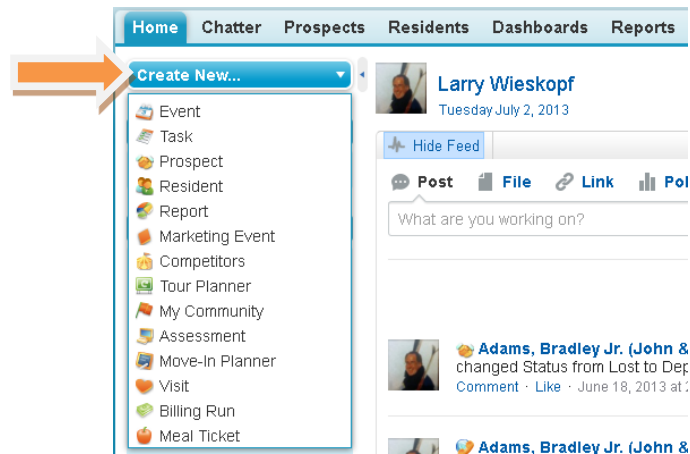
-  Inquirer First Name
-  Inquirer Last Name
-  Initial Contact Date
-  Type of Inquiry
-  Prospect Status
-  At least one Referral Source (*Marketing Event, Advertisement, Contact, Resident, Employee, Other*)

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

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, select the appropriate **Email Consent Given**

10 Specify the **Email Consent Date**

▼ General			
Name	Alison, Ali (Ali Alison)	Community	<u>AutoPostTesting</u>
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		

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:



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

Primary Referral Type	<input type="text" value="Resident"/>	Referred by Contact	<input type="text"/>
Advertisement	<input type="text"/>	Referred by Resident	<input type="text" value="R-13089"/>
Marketing Event	<input type="text" value="Winterfest"/>	Referred by - Other	<input type="text"/>

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?

Fraternel Connections:

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**

Hot Buttons

Suite

Suite Type

Stay Type

Program

Showcase on Visit

Social Activities - PL
Dancing

Social Activities

Support & Services - PL
Assistance

Support & Services

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.

Mailing Instructions

Mailing Label Instructions

Previous Stay

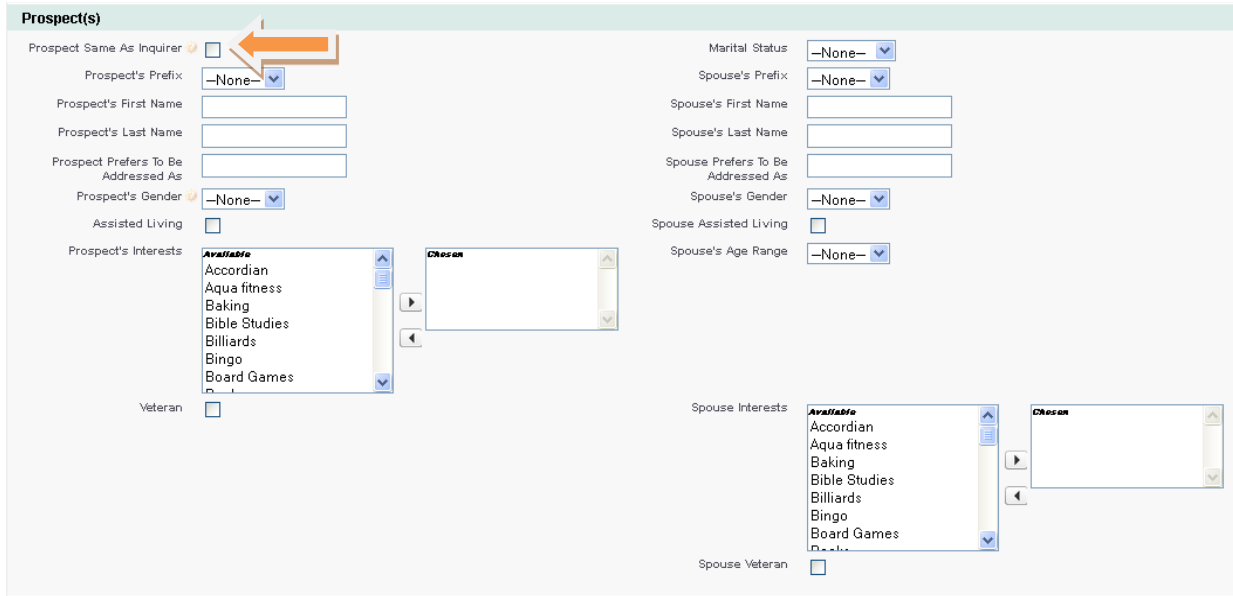
Original Resident ID

Original Stay Type

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 To comply with CASL, if entering a **Prospect's Email**, select the appropriate **Email Consent Given Prospect** and specify the **Email Consent Date Prospect**
- 3 If there is a Second Occupant, fill in the Spouse fields
- 4 To comply with CASL, if entering a **Spouse's Email**, select the appropriate **Email Consent Given Spouse** and specify the **Email Consent Date Spouse**


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



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	<u>iaRetirement - GTA</u>
Status	Deposit
▼ Please Complete This Section To Record Referral Fees	
Resident	<u>R-21118</u>
Referred by Resident Name	Paul Paulson
Resident Referral Fee	<input type="text"/>
Date Resident Referral Fee was Paid	<input type="text"/> [5/15/2014]
Contact	<input type="text" value="Tim Barr"/> 
Contact Referral Fee	<input type="text"/>
Date Contact Referral Fee was Paid	<input type="text"/> [5/15/2014]
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Similar Prospects

- Note the **Similar Prospects** button at the top of the Prospect screen. This function will search your database of Prospects and Inquirers and highlight matches based on Prospect, Spouse, and Inquirer last names, phone numbers, and email addresses.

Prospect	
Prospect Name	Bell, Elaine (Barry & Synthia)
Inquirer Last Name	Bell
Prospect's Last Name	Bell
Spouse's Last Name	Bell
Inquirer's Phone 1	
ProspectFinder	Bell, Elaine (Barry & Synthia). ()
Inquirer's Email	
Prospect's Email	
Spouse's Email	
Prospect's Phone 1	(555) 989-8989

Potential Duplicated Prospects (11)

Name	Inquirer Last Name	Prospect Last Name	Spouse Last Name	Inquirer Phone	Prospect Phone	Inquirer's Email	Prospect's Email	Community
Bell, Billy (Billy Bell)	Bell	Bell						IaRetirement – Test
Bell, Barry (Barry & Synthia)	Bell	Bell	Bell	(555) 989-8989	(555) 989-8989			RHS Sample Community
Rushfeldt, Judy (Ken and Agnes & Irene)	Rushfeldt	Bell	Cosway	(403) 554-2159	(403) 554-2159	jrushfeldt@shaw.ca		

Prospect Letters

Use the **Prospect Letters** button at the top of the Prospect page to merge fields and create quick, customized letters to send out to Prospects and Inquirers

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

- A collapsible section at the top of the Prospect screen allows you to quickly see open Tasks and Events. This is an excellent way to pick up old activities that have not been completed. Simply click the lookup icon to open the activity and insert a completion result.
- Activities are colour-coded: Blue = due today, Pink = Overdue, Unshaded = due in the future

Prospect Detail

[Edit](#) | [Delete](#) | [Clone](#) | [Create Wait List](#) | [Create Move-In Planner](#) | [Close Prospect File](#) | [Similar Prospects](#) | [LinkedIn](#)
[Other Information](#) | [Prospect Letters](#)

▼ Open Activities

Open Tasks					Open Events				
Date	Assigned To	Type	Subject	Summary	Date	Assigned To	Type	Subject	Summary
8/5/2015	Larry Rep	Call	Call To Confirm Tour	Some Notes...	8/6/2015 9:00 AM	Larry Rep	Tour	Tour with Family	...
7/27/2015	Larry Rep	Call	Call to discuss current mobility capabilities	...					

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

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