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 activities 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):

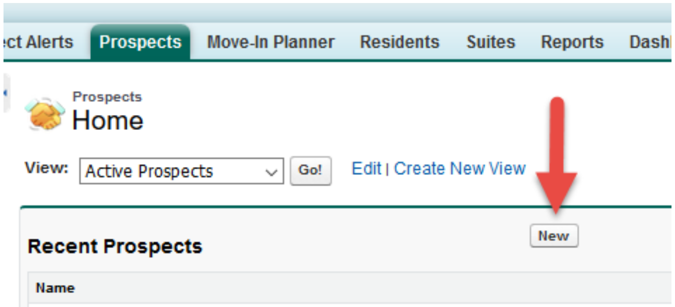
- Inquirer First Name
- Inquirer Last Name
- Initial Contact Date
- Type of Inquiry
- Prospect Status
- At least one Referral Source (*Marketing Event, Advertisement, Contact, Resident, Prospect, Other)*

The system will:

- Create a Prospect record

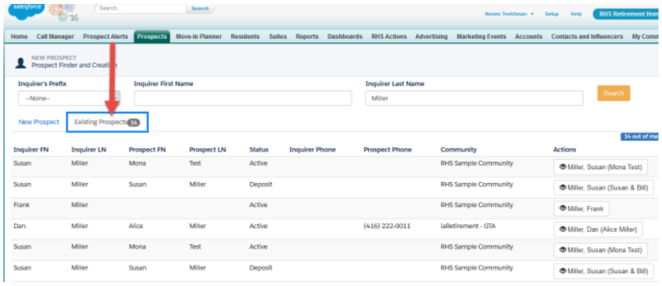
Step by Step

1. Navigate to the Prospect tab
2. Click **New**

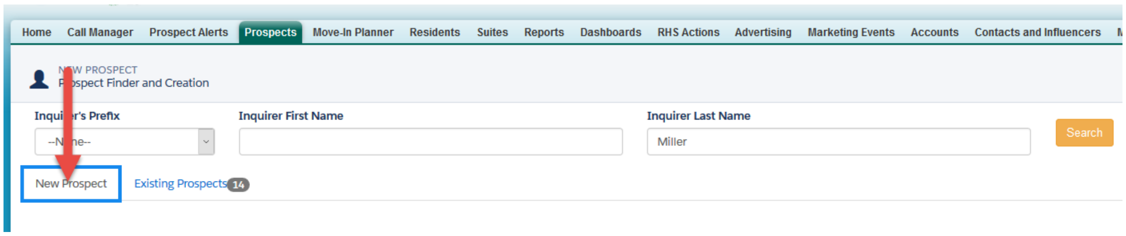


3. Enter the **Inquirer Last Name** and click **Search**. For common last names, enter an **Inquirer First Name** along with the last name to narrow down the search.
4. The **Existing Prospects** tab will list prospect files that match the name search

5 Click the prospect's name in the **Actions** column to view the prospect's file in a new tab. If a file already exists for the prospect for whom you are searching, do not create a duplicate file. Use the existing file to enter new activity.



6 If the prospect for whom you are searching is not an existing prospect, click the **New Prospect** tab and enter information to create a new prospect file



7 Select **Inquirer's Prefix**

8 Enter **Inquirer's First Name**

9 Enter **Inquirer's Email**

10 Enter **Inquirer's Phone 1**

11 Use the **Address Search** bar to search for the inquirer's address. Select the correct address to populate the address fields below.
NOTE: If you are not able to find the address in the address search bar, manually enter the address fields

12 The **My Community** field will default to the community set on the detail page of the logged in user. If necessary, select a different **My Community.**

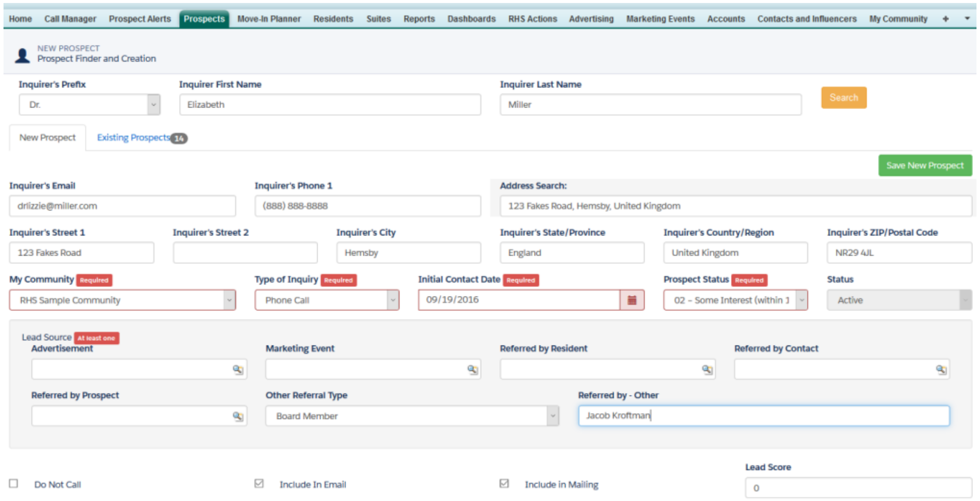
13 Select **Type of Inquiry**

14 Specify **Initial Contact Date**

15 Select **Prospect Status**

16 Specify the appropriate **Lead Source**. This could be an **Advertisement, Marketing Event, Resident, Contact** (Outreach), **Prospect**, or **Other**. You may enter more than one lead source.
NOTE: If the referral type is *Other*, select **Other Referral Type** to specify a category, and also enter **Referred by – Other**

17 Indicate the communication preferences by checking the applicable checkboxes: *Do Not Call, Include in Email,* and/or *Include in Mailing*



18 The remainder of the new prospect entry page is customizable and can include any of your organization's prospect fields. Contact Support@RetirementHomeSoftware.com to personalize the new prospect entry page for your organization. These are fields that will appear on the initial entry of a new prospect. After saving a new prospect file, all fields will become visible on the prospect file.

19 When you have completed entering the new prospect, click **Save New Prospect**

Other Fields

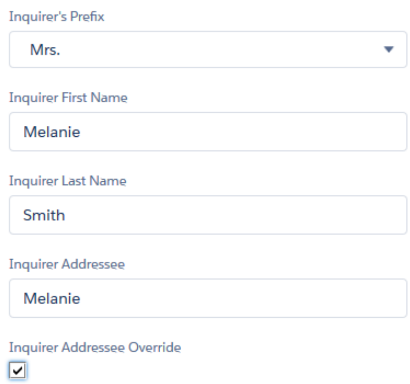
Below are some common fields on the prospect page, along with their descriptions:

Copy Inquirer Info to Prospect On Save - If the Prospect is the person inquiring, you do not have to reenter their name and contact information in the Prospect(s) section. Simply check off this checkbox and it will auto-populate when you save.

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.

Email Consent Given - To comply with anti-spam legislation in some locations, this field allows you to specify the consent that the inquirer and/or prospect has given for email communication

Inquirer Addressee - Upon saving the prospect file, this field will default to the Prefix and the Inquirer Last Name. This Addressee name will be used when mailing labels, mailing lists, or mail merge letters are created for this inquirer. If you would like the **Inquirer Addressee** field to show a different name (for example, you would like this person addressed by their first name), enter the name as you would like for it to appear in the **Inquirer Addressee** field. Then check the **Inquirer Addressee Override** checkbox.

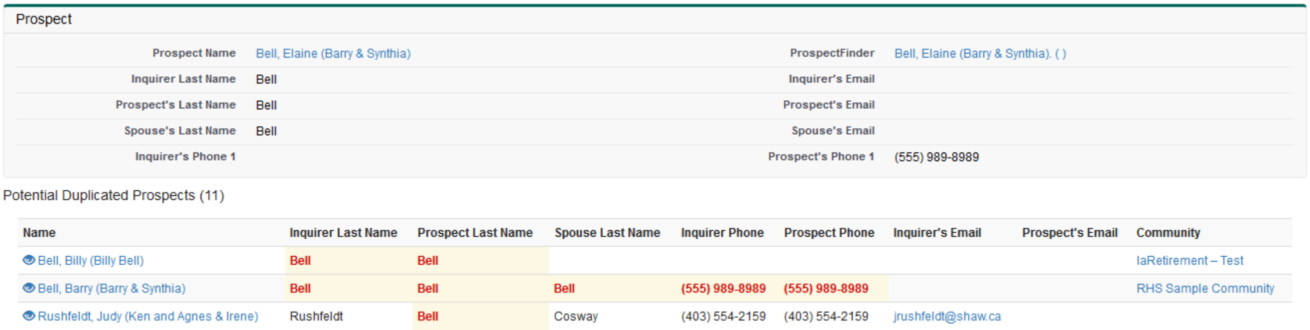


Mailing Label Instructions - The system will look at these instructions when creating mailing lists and mailing labels in the system

Prospect Addressee - When saved, this field will default depending on the prefix, whether or not there is a second occupant, and whether the second occupant's last name is different than that of the prospect. This Addressee name will be used when mailing labels, mailing lists, or mail merge letters are created for this prospect. If you would like the **Prospect Addressee** field to show a different name (for example, you would like this person addressed by their first name), enter the name as you would like for it to appear in the **Prospect Addressee** field. Then check the **Prospect Addressee Override** checkbox.

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.
- You are encouraged to click the **Similar Prospects** button immediately after entering a new prospect or when opening a new web lead



Prospect

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

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 Letters

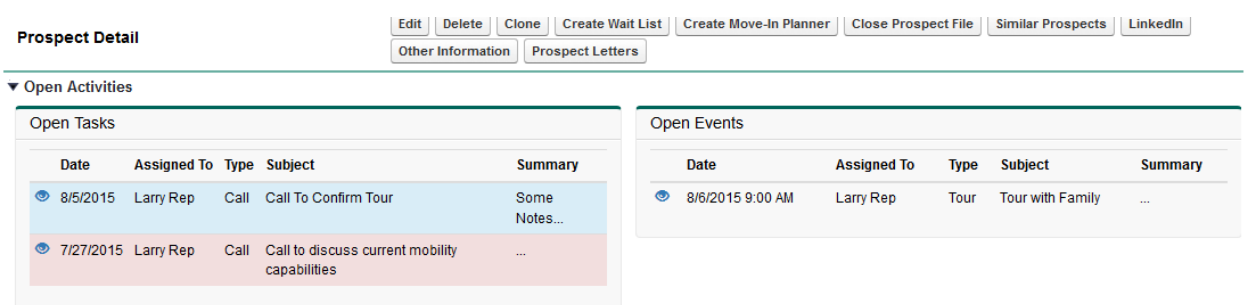
Use the **Prospect Letters** button at the top of the Prospect page to merge fields and create quick, customized letters to send out to Prospects and Inquirers

Related Lists

The following lists can be found on 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



Open Tasks

Date	Assigned To	Type	Subject	Summary
8/5/2015	Larry Rep	Call	Call To Confirm Tour	Some Notes...
7/27/2015	Larry Rep	Call	Call to discuss current mobility capabilities	...

Open Events

Date	Assigned To	Type	Subject	Summary
8/6/2015 9:00 AM	Larry Rep	Tour	Tour with Family	...

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