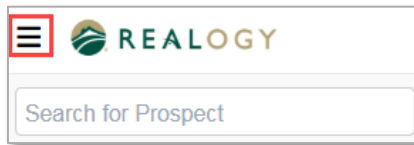


## Attraction Tool for Goals and Accountability

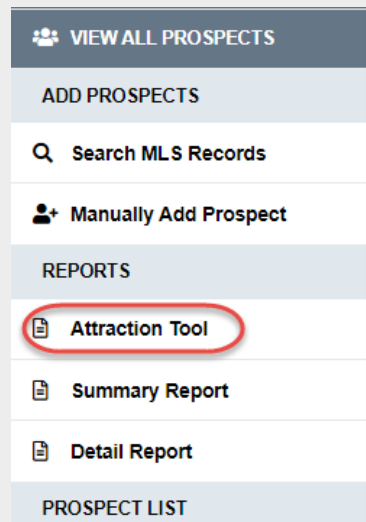
Users with the Security Role of Executive for iProspect in dash can view and edit goals for individual users and see the Recruiting Goals and Target Progress rolled up for an individual user or at an office level in the Attraction Tool page.

To learn more about iProspect please review the following job aids: Searching for a Prospect, Adding a Prospect, Editing a Prospect, Adding an Activity to a Prospect and Managing Your Prospect List.

From the dashboard, click **Menu**.



Within the **Reports** section, select **Attraction Tool**.



From the list of Available Users in the office **Select the person(s) you wish assign goals to.**

**Select an Office**  
0001 - Jackson, MI

**Select a User**  
Select or type a User [GO]

**All Users**  
Bob Smith  
Jennifer Green  
Sharon Chen

**Filtering Goals**  
Company Dollars 0  
Recruits Goal 0  
Experienced Agents 0  
New Agents 0  
Weekly Contacts 0  
Weekly Appointments 0

**Am I on Target?**

Total Activity	Year	Month	Week
# Contacts Made	0	0	0
# Appts Held	0	0	0
# Agents Joined	0	0	0
# Agents Left	0	0	0
# Total Leads	0		

**Prospects will not appear when:**

- Leading Rating is (3) with no Last Contact Date
- Lead Rating is (X) for more than 30 days
- Date joined is greater than 90 days

**Filtering Options:**

- (3) = 01 to 90 days
- (4) = 91 to 180 days
- (5) = Prospect
- (X) = Not Affiliating

Enter the **goals** for the User and click **Save**. The user will now see those goals when they sign in.

### Edit Goals ✖

Additional Company Dollars

Top Agents

Experienced Agents

New Agents

Weekly Contacts

Weekly Appointments

Cancel
Save

When you select a specific **recruiter**, you will see how their activities are tracking towards their goals.

☰ <
iProspect ?

**Select an Office**

0001 - Jackson, MI

**Select a User**

Bob Smith

GO

**Attraction Tool - 05/14/2020**

Bob Smith

0001 - Jackson, MI

Prospects will not appear when:

- Leading Rating is 5 with no Last Contact Date
- Lead Rating is X for more than 30 days
- Date joined is greater than 90 days

**Lead Rating**

- 1 = 30 days or less
- 2 = 31 to 60 days
- 3 = 61 to 90 days
- 4 = 91 to 180 days
- 5 = Prospect
- X = Not Affiliating

**My Recruiting Goals** Edit

Additional Company Dollars	\$5,900
Number of Recruits Goal	72
Top Agents	15
Experienced Agents	18
New Agents	39
Weekly Contacts	30
Weekly Appointments	7

\* Updated by Steve Jones on 5/14/2020

**Am I on Target?**

Total Activity	Year	Month	Week
# Contacts Made	18	7	2
# Appts Held	4	1	0
# Agents Joined	2	0	0
# Agents Left	0	0	0
# Total Leads	9		

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Agent Name	Current Company	LTM Volume	Phone	Email	Source	Notes	Rating	Next Steps	Last Contact	Last Appt	Joined	Left
	Howard Hanna Real Estate	OK			iProspect Tool	interviewed, will follow up	<span style="border: 1px solid #ccc; border-radius: 50%; padding: 0 2px;">3</span>	-	01/10/2018	01/10/2018		
	Advanced Realty Global	837K	(269) 370-3377		iProspect Tool	Notes2	<span style="border: 1px solid #ccc; border-radius: 50%; padding: 0 2px;">5</span>	-	01/16/2020			

When you select **All Users**, you will see a summary of goals and Am I on Target for that office.

☰ <
iProspect ?

**Select an Office**

0001 - Jackson, MI

**Select a User**

All Users

GO

**Attraction Tool - 05/14/2020**

All Users

0001 - Jackson, MI

Prospects will not appear when:

- Leading Rating is 5 with no Last Contact Date
- Lead Rating is X for more than 30 days
- Date joined is greater than 90 days

**Lead Rating**

- 1 = 30 days or less
- 2 = 31 to 60 days
- 3 = 61 to 90 days
- 4 = 91 to 180 days
- 5 = Prospect
- X = Not Affiliating

**My Recruiting Goals**

Additional Company Dollars	\$340,700
Number of Recruits Goal	214
Top Agents	20
Experienced Agents	34
New Agents	60
Weekly Contacts	42
Weekly Appointments	17

**Am I on Target?**

Total Activity	Year	Month	Week
# Contacts Made	148	71	37
# Appts Held	27	9	3
# Agents Joined	7	1	0
# Agents Left	1	0	0
# Total Leads	54		

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Recruiter	Agent Name	Current Company	LTM Volume	Phone	Email	Source	Notes	Rating	Next Steps	Last Contact	Last Appt	Joined	Left
		Re/Max Mid-Michigan R.E.				iProspect Tool	null	<span style="border: 1px solid #ccc; border-radius: 50%; padding: 0 2px;">5</span>		10/06/2017	09/13/2017		

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