Managing your Prospect List

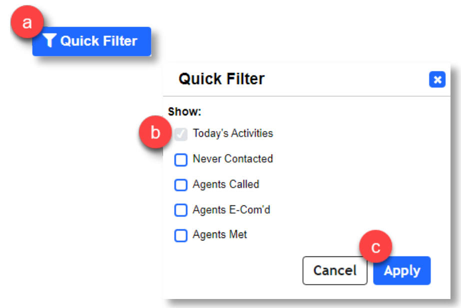
The dashboard is the starting point for your prospecting activities. You can sort and filter your dashboard to allow you to focus on specific types of prospects. Below are suggestions for managing your prospect list.

What activities are scheduled for today or the next few days?

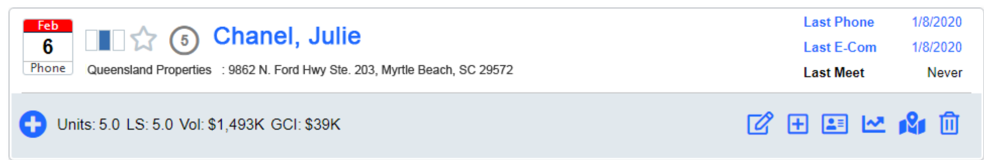
Stay on task with upcoming activities on your schedule using one of these three techniques:

1. **Use Quick Filter to view today's activities:**
   a. Click the **Quick Filter** button.
   b. Select **Today's Activities** and deselect all other options.
   c. Click **Apply**.

Result: Activities scheduled for today will display.



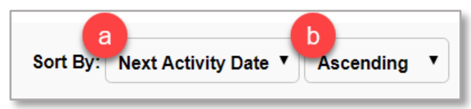
Result: Activities scheduled for today will display.



OR

2. **Sort your dashboard to see future activities:**
   a. Click the first **Sort By** drop down and select **Next Activity Date**.
   b. Click the second **Sort By** drop down and select **Ascending.**

   Result: Activities are sorted in priority from today forward.



Result: Activities are sorted in priority from today forward.

OR

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What activities are scheduled for today or next few days?
(continued)

3. Check your **Upcoming Schedule** to be sure you are staying on task.
   a. From the **Menu** choose **Upcoming Schedule**.

Result: Your Upcoming Activities are shown in the Agenda view. You can switch to a **Day**, **Week** or **Month** view in the upper right corner.

Result: Your Upcoming Activities are shown in the **Agenda** view. Use the options in the upper-right corner to switch to **Day**, **Week**, or **Month** view, instead.

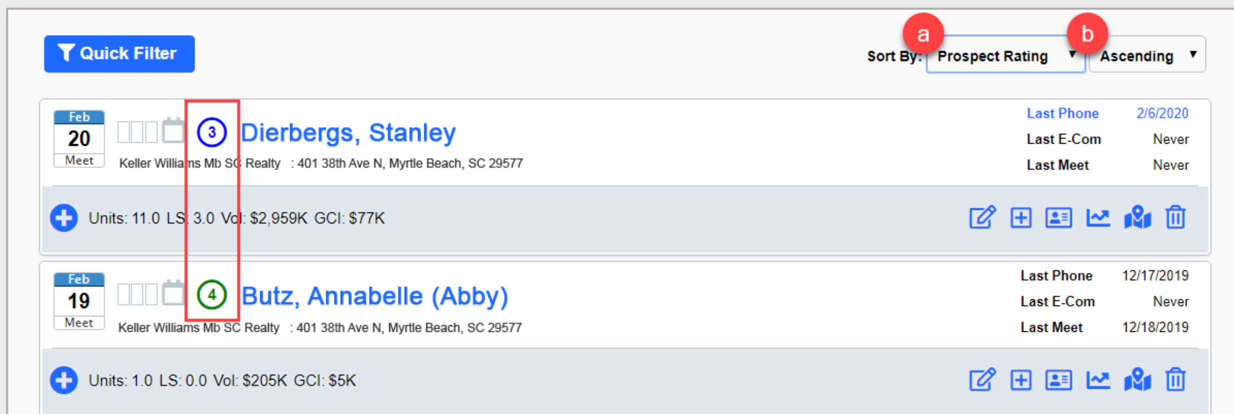
Follow-up on hot prospects.

Sort your dashboard to review those prospects you've rated as a 1 or 2. What additional activities do you need to complete to get these prospects to affiliate you're your company?

a. Click the first **Sort By** drop down and select **Prospect Rating**.

b. Click the second **Sort By** drop down and select **Ascending.**

Result: The hot prospects (ratings of 1 or 2) will be at the top of the list.



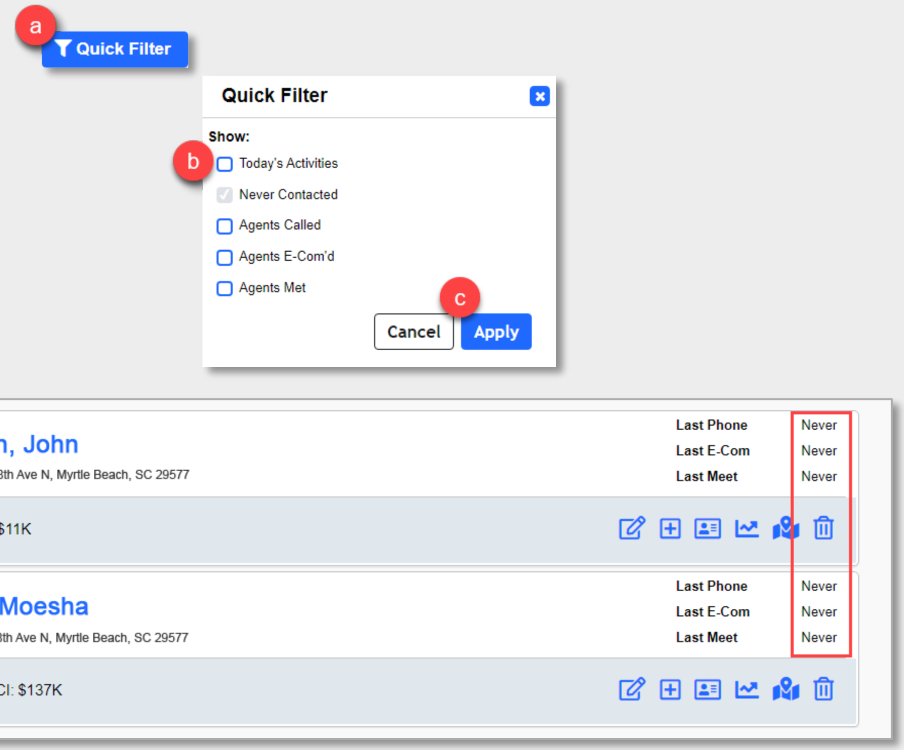
Prospect Rating
1 = 30 days or less
2 = 31 – 60 days
3 = 61 – 90 days
4 = 91 –180 days
5 = Not affiliating

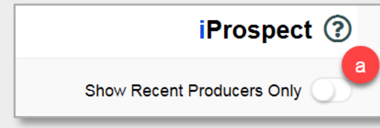
Reach out to agents that you've never contacted

Filter your dashboard to see agents who you've not yet contacted.

a. Click the **Quick Filter** button.
b. Select **Never Contacted** and deselect all other options.
c. Click **Apply**.

Result: The prospects who have never been contacted will display.





Reach out to recent producers

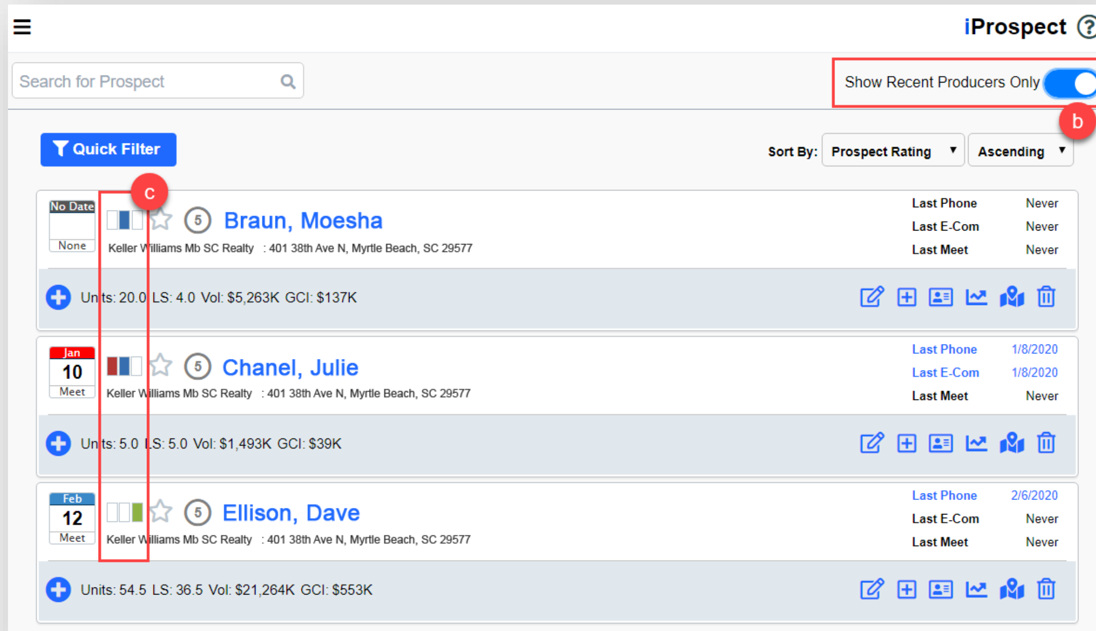
Filter your dashboard to see agents with production within the last week. You can even send a congratulatory email from within iProspect. It's a great reason to make contact.

a. Click the **Show Recent Producers Only** toggle switch

b. Once turned on, the toggle turns blue.

c. Click on any of the colored **Production boxes** to see a list of the most recent production.

- **Red** – Last Sale
- **Blue** – Last Contract
- **Green** – Last Listing



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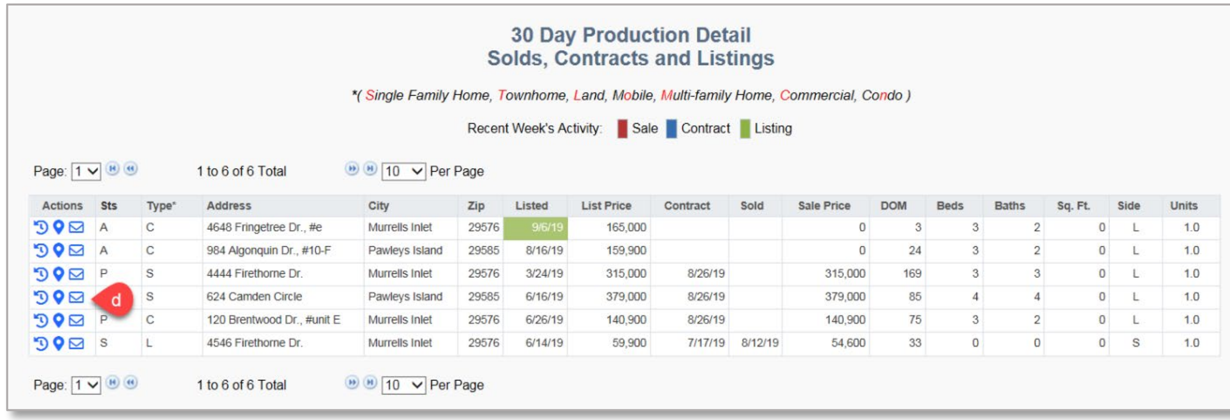
Reach out to recent producers
(continued)

Once you click one of the colored boxes, a list of the prospects with recent displays. The colored boxes are your indication of the most recent production.

d. To send a congratulatory email, click on the **email icon** ✉.



Actions	Sts	Type*	Address	City	Zip	Listed	List Price	Contract	Sold	Sale Price	DOM	Beds	Baths	Sq. Ft.	Side	Units
	A	C	4648 Fringetree Dr., #e	Murrells Inlet	29576	9/6/19	165,000			0	3	3	2	0	L	1.0
	A	C	984 Algonquin Dr., #10-F	Pawleys Island	29585	8/16/19	159,900			0	24	3	2	0	L	1.0
	P	S	4444 Firethorne Dr.	Murrells Inlet	29576	3/24/19	315,000	8/26/19		315,000	169	3	3	0	L	1.0
		S	624 Camden Circle	Pawleys Island	29585	6/16/19	379,000	8/26/19		379,000	85	4	4	0	L	1.0
	P	C	120 Brentwood Dr., #unit E	Murrells Inlet	29576	6/26/19	140,900	8/26/19		140,900	75	3	2	0	L	1.0
	S	L	4546 Firethorne Dr.	Murrells Inlet	29576	6/14/19	59,900	7/17/19	8/12/19	54,600	33	0	0	0	S	1.0

The E-mail Prospect window opens.

e. Edit the email message as needed
f. Confirm that **Automatically log activity is checked**. This allows this activity to be recorded in iProspect for you.
g. Click **Send**.

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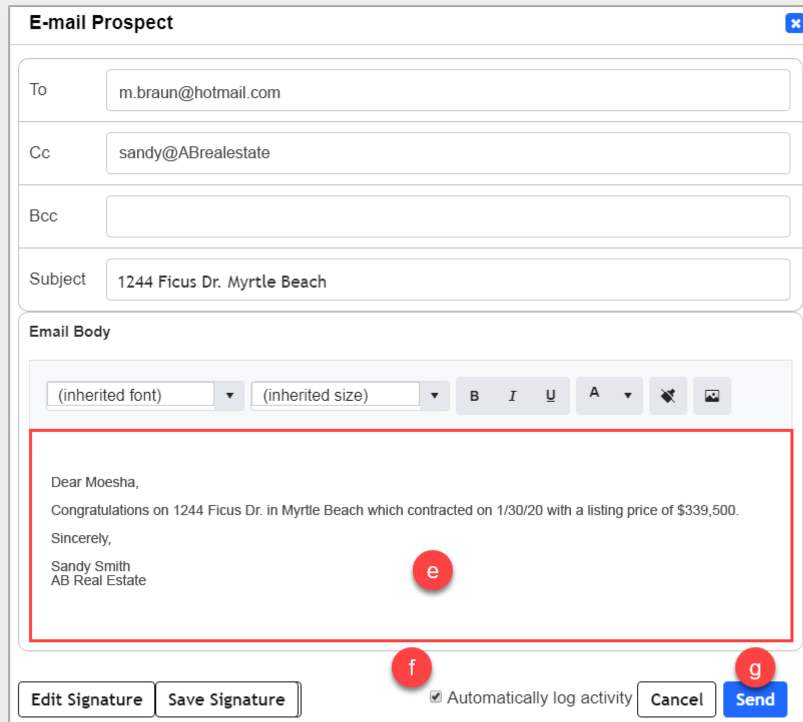
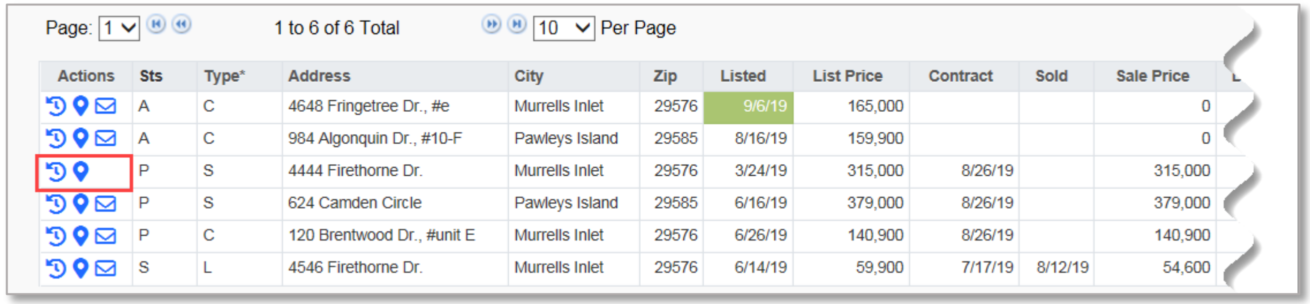


Reach out to recent producers
(continued)

Once you click **Send**, you will be brought back to the production detail page.

As confirmation, you will see that the email icon disappears. This is to prevent you from sending a duplicate email for that transaction.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Actions	Sts	Type*	Address	City	Zip	Listed	List Price	Contract	Sold	Sale Price
	A	C	4648 Fringetree Dr., #e	Murrells Inlet	29576	9/6/19	165,000			0
	A	C	984 Algonquin Dr., #10-F	Pawleys Island	29585	8/16/19	159,900			0
	P	S	4444 Firethorne Dr.	Murrells Inlet	29576	3/24/19	315,000	8/26/19		315,000
	P	S	624 Camden Circle	Pawleys Island	29585	6/16/19	379,000	8/26/19		379,000
	P	C	120 Brentwood Dr., #unit E	Murrells Inlet	29576	6/26/19	140,900	8/26/19		140,900
	S	L	4546 Firethorne Dr.	Murrells Inlet	29576	6/14/19	59,900	7/17/19	8/12/19	54,600