Seniors Home Services
REMOTE CARE TODAY

Prospect Management 1.2025 v002

1. **Duplicate or Overlapping Entries:**
   - If a Consultant enters a prospect into the CRM, there is a possibility that the prospect may already exist under a different name, different Consultant, or may be in progress. This includes scenarios where:
   - The prospect is part of a larger organization or group that is already being worked on.
   - The prospect is a duplicate entry, meaning another Consultant is already engaging with the same contact or entity.
   - In such cases, the **Account Success Team** will review and notify the submitting Consultant via email to address the overlap. When necessary, the Account Success Team will have to determine to which Consultant the prospect belongs.

2. **Activity and Inactivity Policy:**
   - Each prospect entry must have an **active task and a set follow-up date** within the system to demonstrate ongoing effort and a clear plan for engagement.
   - If no action has been taken on a prospect for 2 weeks and no next task or date has been set, the prospect will be considered **inactive**.

- Inactive prospects are subject to **reassignment** to another consultant who has made inroads or demonstrated interest in engaging with the same prospect or contact.

3.**Notification Process:**
- If your prospect entry is identified as part of a larger entity already being worked on or flagged as a duplicate, you will receive a detailed email from the Account Success Team.
- The email will outline:
- The status of the prospect (e.g., linked to a larger entity or duplicate).
- The Consultant currently assigned to the prospect.
- Any recommendations or next steps for resolving the overlap, such as potential collaboration or redirection to other prospects.

4.**Responsibility and Collaboration:**
- It is the responsibility of each Consultant to ensure their entries are complete, up-to-date, and reflect current activity.
- Collaboration with the Account Success Team and other Consultants may be necessary when overlaps occur to maintain a streamlined and efficient prospecting process.

This policy is designed to ensure transparency, avoid duplication of effort, and maintain a productive workflow within the team.

Click Here to sign off on confirmation

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