



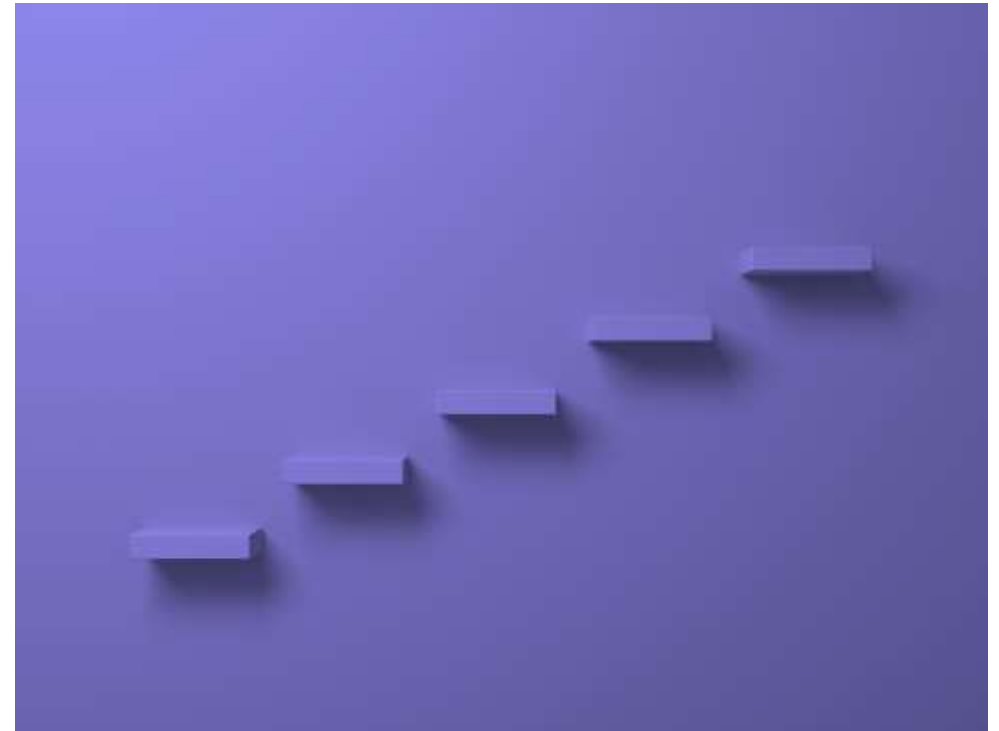
# Streamline Your Service Model With CRM Automations

# Workflow Strategies

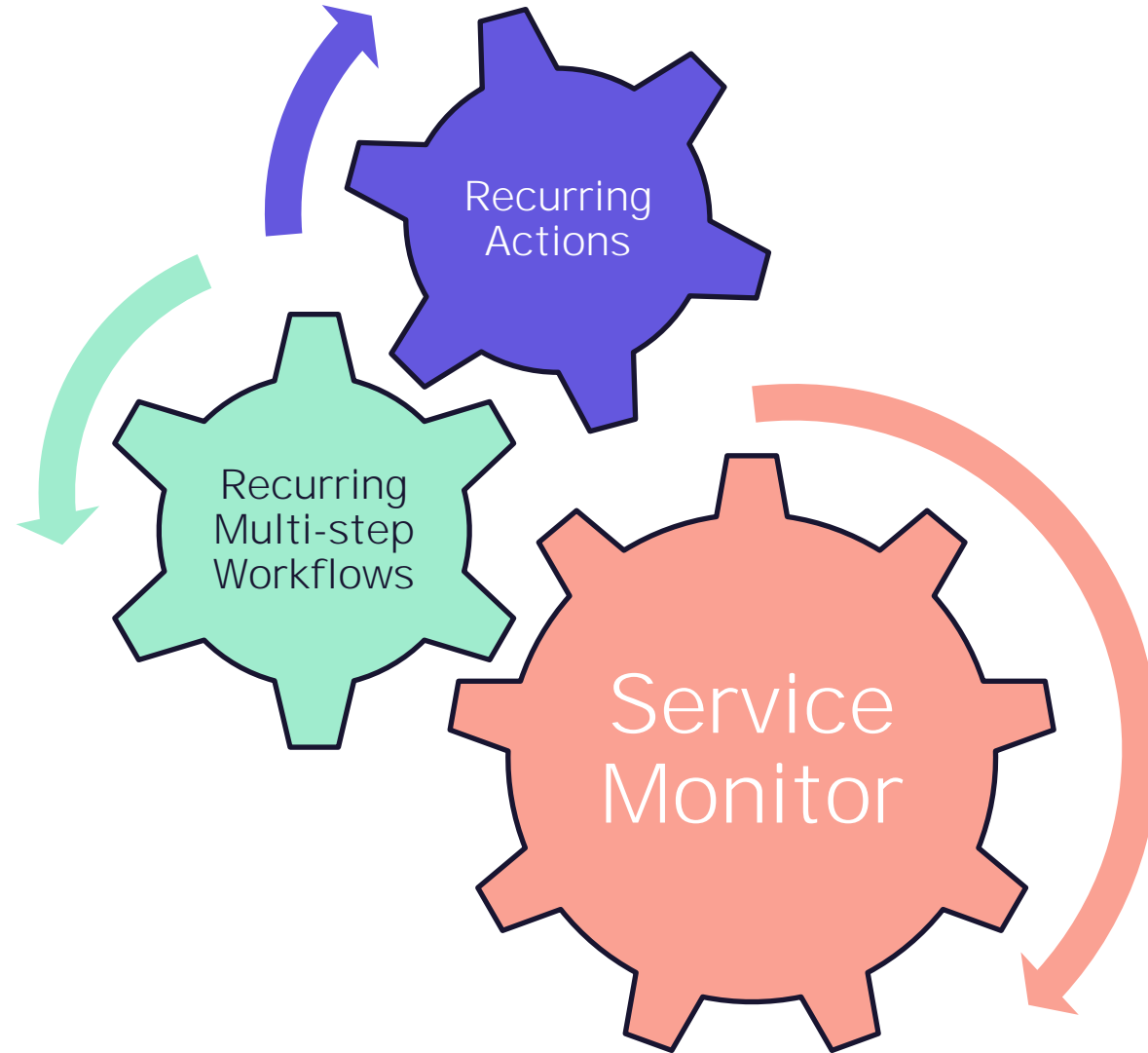
Single Step



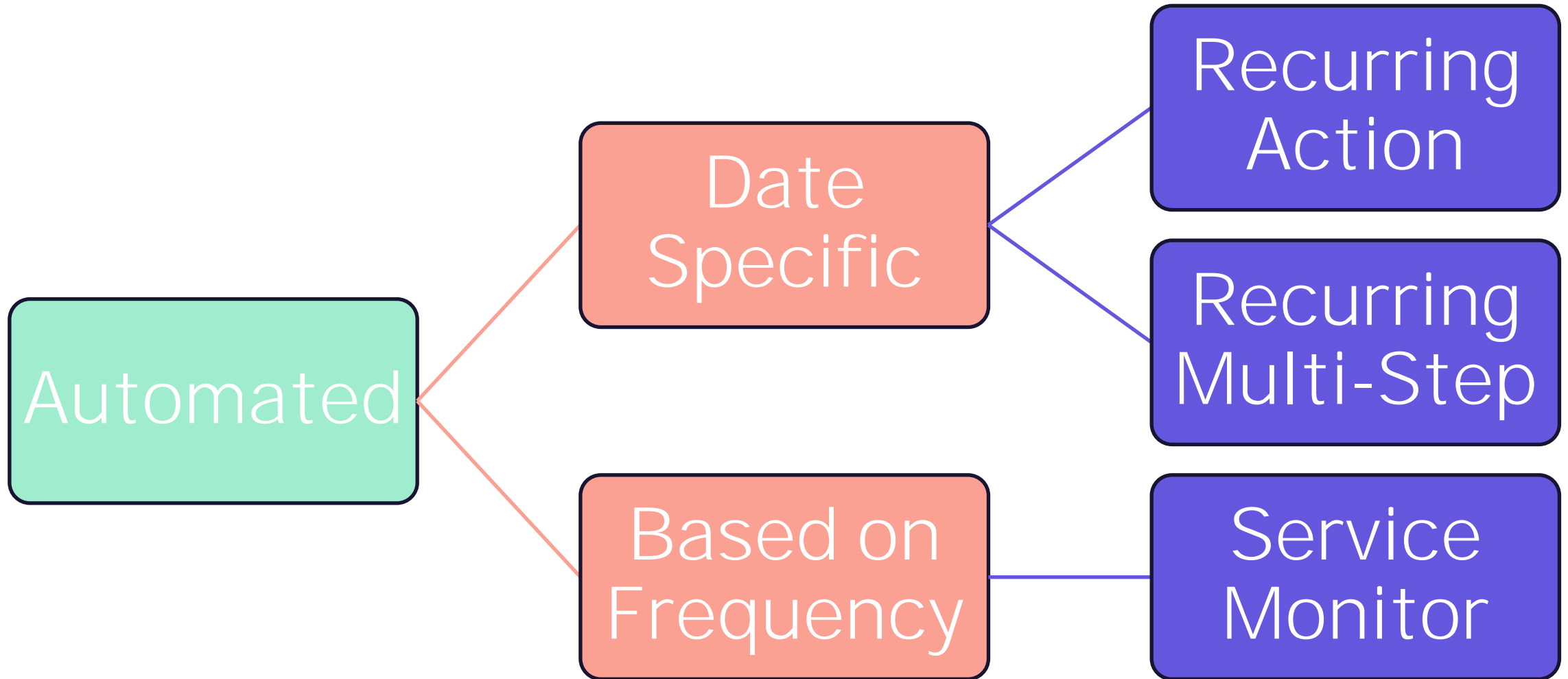
Multi Step



# Today's Areas of Focus



# How are these different?



## Examples of Recurring Actions

- Client Birthday Call/Card
- Withdrawals/Payments
- Yearly RMD Project
- Qtr. Tax Estimate Reminder
- Firm Insurance Review
- Sending Annual Privacy Policy
- SEC Renewal Process

## Office-related Recurring Actions

- Contact Data Check Reviews
- Annual Compliance
- Employee Performance Reviews
- Action Data Review
- Document Template Review
- Existing Workflow Review
- Annual Disaster Planning Meeting
- List Maintenance Review
- Email Template Review

## Range of Recurrence

From   No end date  
 End after  occurrence(s)  
 End by

When to start and stop

## Recurrence Pattern

Daily  Weekly  Monthly  Yearly

Every  year(s):  On    
 The   of   
 The   of

When will the Action fire?

## Action / First Step Pending On

Days before due date   On completion of previous

Date Added	Action Due On
1/10/2021	1/15/2021
1/10/2022	1/15/2022
1/10/2023	1/15/2023
1/10/2024	1/15/2024
1/10/2025	1/15/2025
1/10/2026	1/15/2026

First Action Will Be Pending On 1/10/2021  
\*Preview limited to 6 occurrences

January 2021

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

When should you get a Pending Action?

## Select Workflow

Entered By:

Add Workflow:

Summary

Type: Phone Assigned : <Employee Creating Action>  
Subject :

What Workflow should I use?

# What Action/Workflow do we want to use?

## Workflows > Recurring Action Definition

Workflow Name:  Workflow Description/Trigger:   
1st day of June every year (No end specified) Entered By:  × CANCEL × DELETE ✓ SAVE AND CLOSE

Summary Expand All Collapse All

Event Planning - College ...

<b>Assigned</b> : Addison, Cheryl <b>Type:</b> Note		
<b>Subject</b> : Event Planning - College Planning Seminar		
<b>Notes:</b> Start Planning College Seminar Event <b>Add/Launch Event Panning Workflow</b>	Type : Note Category : Events Assigned : Addison, Cheryl Priority :	<b>Assignee:</b> Addison, Cheryl



# Recurring Action - Reporting

## Workflows > Recurring Action Definition

+ ADD NEW RECURRING ACTION

Drag a column header and drop it here to group by that column.

COMMANDS	TYPE	SUBJECT	ASSIGNED TO	START DATE	NEXT OCCURRENCE	SCHEDULE
+ [edit] [trash]	Note	Event Planning - Spring Wine Tasting	Addison, Cheryl	5/21/2021	2/1/2023	1st day of February ever...
+ [edit] [trash]	Note	Annual Employee Compliance Requirements	Compliance	2/11/2022	12/25/2022	1st day of January ever...
+ [edit] [trash]	Note	Annual Private Policy Mailing	CSR	2/11/2022	12/25/2022	1st day of January ever...
- [edit] [trash]	Note	Data Clean Up Check	Cameron, Tricia	8/24/2020	7/27/2022	First weekday every 6 m...

UIActionID	Action Type	Subject	Required	Entered Date	Due Date	Completed	Completed Date	Completed By
1457	Note	Data Clean Up Check	✓	1/27/2022	2/1/2022	✓	2/8/2022	Cameron, Tricia
1127	Note	Data Clean Up Check	✓	7/28/2021	8/13/2021	✓	8/17/2021	Cameron, Tricia
523	Note	Data Clean Up Check	✓	1/27/2021	2/1/2021	✓	1/29/2021	Cameron, Tricia

1 - 3 of 3 items

+ [edit] [trash]	Note	Annual Portfolio Holdings Report	Henry, John	2/11/2022	6/24/2022	1st day of July every year
+ [edit] [trash]	Note	Event Planning - College Planning Seminar	Addison, Cheryl	5/21/2021	6/1/2022	1st day of June every ye...
+ [edit] [trash]	Task	Run Monthly Birthday List	Cameron, Tricia	2/15/2022	3/24/2022	Last weekday every mo...
+ [edit] [trash]	Task	Add Birthday Card Sent Action	Cameron, Tricia	2/15/2022	2/28/2022	First weekday every mo...

1 - 8 of 8 10

# Recurring Action - Reporting

RECORD NAME	TYPE	SUBJECT	ASSIGNED TO	START DATE	NEXT OCCURRENCE	SCHEDULE	
<b>Record Name: Cameron Wealth Management</b>							
My Pending Actions	ment	Note	Event Planning - Spring Wine Tasting	Addison, Cheryl	5/21/2021	2/1/2023	1st day of February ev...
My Past Due and Due Today Actions	ment	Note	Annual Employee Compliance Requirements	Compliance	2/11/2022	12/25/2022	1st day of January ev...
All Actions	ment	Note	Annual Private Policy Mailing	CSR	2/11/2022	12/25/2022	1st day of January ev...
Last 20 Actions	ment	Note	Data Clean Up Check	Cameron, Tricia	8/24/2020	7/27/2022	First weekday every 6 ...
Recurring Action Definition	ment	Note	Annual Portfolio Holdings Report	Henry, John	2/11/2022	6/24/2022	1st day of July every y...
+ Cameron Wealth Management	Task		Run Monthly Birthday List	Cameron, Tricia	2/15/2022	3/24/2022	Last weekday every m...
+ Cameron Wealth Management	Task		Add Birthday Card Sent Action	Cameron, Tricia	2/15/2022	2/28/2022	First weekday every m...
<b>Record Name: Andrews - George &amp; Sally</b>							
+ Andrews - George & Sally	Note		Birthday Reminder - George	Advisor 1	1/22/2021	1/14/2023	19th day of January e...
+ Andrews - George & Sally	Task		Birthday Reminder- Sally	Advisor 1	4/15/2021	5/18/2022	25th day of May every...
<b>Record Name: Bennett/Edgerley - Clayton and Ophelia</b>							
+ Bennett/Edgerley - Clayton and Oph...	Note		Birthday Reminder	Advisor 1	2/22/2021	11/18/2022	23rd day of November...
<b>Record Name: Carmichael - Abbott and Ophelia</b>							
+ Carmichael - Abbott and Ophelia	Note		Birthday Reminder - Phi	Advisor 1	8/25/2021	10/30/2022	6th day of November ...
+ Carmichael - Abbott and Ophelia	Task		Birthday Reminder - Abbott	Advisor 1	2/24/2021	7/14/2022	19th day of July every...
<b>Record Name: Pennington - Chase and Lyra</b>							
+ Pennington - Chase and Lyra	Note		Birthday Notification - Chase	Advisor 1	2/22/2021	10/16/2022	21st day of October e...
+ Pennington - Chase and Lyra	Note		Birthday Notification - Lyra	Advisor 1	2/22/2021	9/12/2022	17th day of Septembe...
<b>Record Name: Campbell/Sutton - Steven and Sophia</b>							
+ Campbell/Sutton - Steven and Sophia	Task		Birthday Reminder	Advisor 1	4/27/2021	10/11/2022	18th day of October e...

# Reminder to Schedule Quarterly Meeting

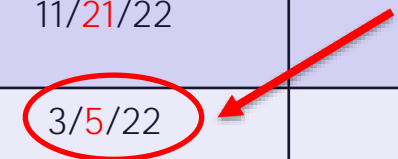
Recurring Action	
RA Date	Mtg Date
1/15/22	1/21/22
4/15/22	4/25/22
7/15/22	8/21/22
10/15/22	12/5/22
1/15/22	



Recurs on **same date** within specified interval

# Recurring Action vs. Service Monitor

Service Monitor	
SM Date	Mtg Date
1/15/22	1/21/22
4/21/22	4/28/22
7/28/22	8/21/22
11/21/22	12/5/22
3/5/22	



Interval calculated off the **last completed date**

## Examples of Services

- Portfolio Rebalance
- Scheduled Meetings
- Client Social Invitations (i.e. Lunch dates)
- Quarterly Contact Calls
- Financial Plan Review
- Goal Reviews
- Drip Marketing Emails (for prospects)



GOLD

Alpha

Diamond

Tier 1

# client Segmentation

OAK

A Client

Silver



# Service Monitor Setup:

What to know, before  
you go!

- ✓ Plan out the details before you set things up
  - ✓ Frequency
  - ✓ Lead time
  - ✓ What needs to be done
  - ✓ Who is going to do it
- ✓ Create a service specific workflow





# What's this about Workflows?

[Back to Workflow List](#)

Be sure to click **Save Template** to keep your changes [Delete Template](#)

## Workflow Setup and Edit

Workflow Category \*  Status \*

Workflow Name \*  Owner

Workflow Description/Trigger

Last Edited By

Last Review

First Step completes automatically on add

### Summary

- SM - Schedule Meeting
- SM - Meeting Prep
- SM - Meeting
- SM - Follow up

[Expand All](#) [Collapse All](#)

<b>Assigned</b> : <CSR> <b>Type</b> : Phone <b>Subject</b> : SM - Schedule Meeting	<b>Notes:</b> Schedule Meeting  Date:  Time:  Location:	<b>Type</b> : Phone <b>Category</b> : Scheduling <hr/> <b>Assigned</b> : <CSR> <b>Priority</b> : <b>Days Until Due</b> :	<b>Assignee:</b> <CSR>
<b>Assigned</b> : <CSR> <b>Type</b> : Note <b>Subject</b> : SM - Meeting Prep			
<b>Assigned</b> : <Advisor 1> <b>Type</b> : Meeting <b>Subject</b> : SM - Meeting			
<b>Assigned</b> : <Advisor 1> <b>Type</b> : Note <b>Subject</b> : SM - Follow up			

# What's this about Workflows?

Status: Complete Assigned : Cameron, Tricia Type: Meeting ID: 518  
Subject : SM - Meeting

Linked: Assets Documents Emails Insurance Opportunities User Defined Fields Calendar

Notes: \* Notes saved less than a minute ago

Notes:

- Info for 529 plan needs to be sent
- Changing monthly contribution for Roth Account
- Ways to further diversify their portfolio

TC - 2/3/2021 - 3:09:27 PM

\*\*Complete Service to schedule next interval\*\*

Add Relevant Tags

Entered By : Cameron, Tricia  
Created : 01/21/2021 4:07 PM  
Time Spent : Minutes  
Type : Meeting  
Category : Meetings  
Tags : 529, IRA Contribution, Portfolio Review

Action Required  
Assigned : Cameron, Tricia  
Priority : Select an ...  
Start Date :  
Due Date : 02/03/2021

Completed  
Completed by : Cameron, Tricia  
Completed on : 02/03/2021 3:12 PM

FYI on Save :  
Select Group : Select Group to FYI  
Viewing : All

Adv 1  
 Adv 2  
 CSR  
 Addison, Cheryl  
 Cameron, Tricia  
 Hare, Josh  
 Henry, John

**Service Monitor:**  
 Client Touch | Due: 11/01/22  
 Meeting | Due: 05/03/22  
 Special Interest | Due: 03/20/22  
Article

Cancel Save

# What's this about Workflows?

## Workflow Setup

+ ADD NEW TEMPLATE

- All
- Action
- Actions General
- Advertising
- Business Development
- Client Service
- Compliance
- Engagement
- Firm Related
- Marketing
- Meetings
- Money Movement
- Planning
- Portfolio/Trading
- Rebalance Porfolio
- Reporting
- SAC Alerts
- Service Monitor**
- Taxes
- TRM Alerts

**Filter(s) Applied:** Action Template Category Equal To 'Service Monitor'

0 SELECTED ALL PAGE NONE

Drag a column header and drop it here to group by that column

	ACTION TEMPLATE CATEGORY	TEMPLATE NAME	ACTION TEMPLATE ST...	OWNER
<input type="checkbox"/>	Service Monitor	SM - Meeting	Active	Cameron, Tricia
<input type="checkbox"/>	Service Monitor	SM - Client Touch	Active	Cameron, Tricia
<input type="checkbox"/>	Service Monitor	SM - Special Interest Article	Active	Cameron, Tricia
<input type="checkbox"/>	Service Monitor	SM - Lunch Date/Meeting	Active	Cameron, Tricia









1

# What's this about Workflows?

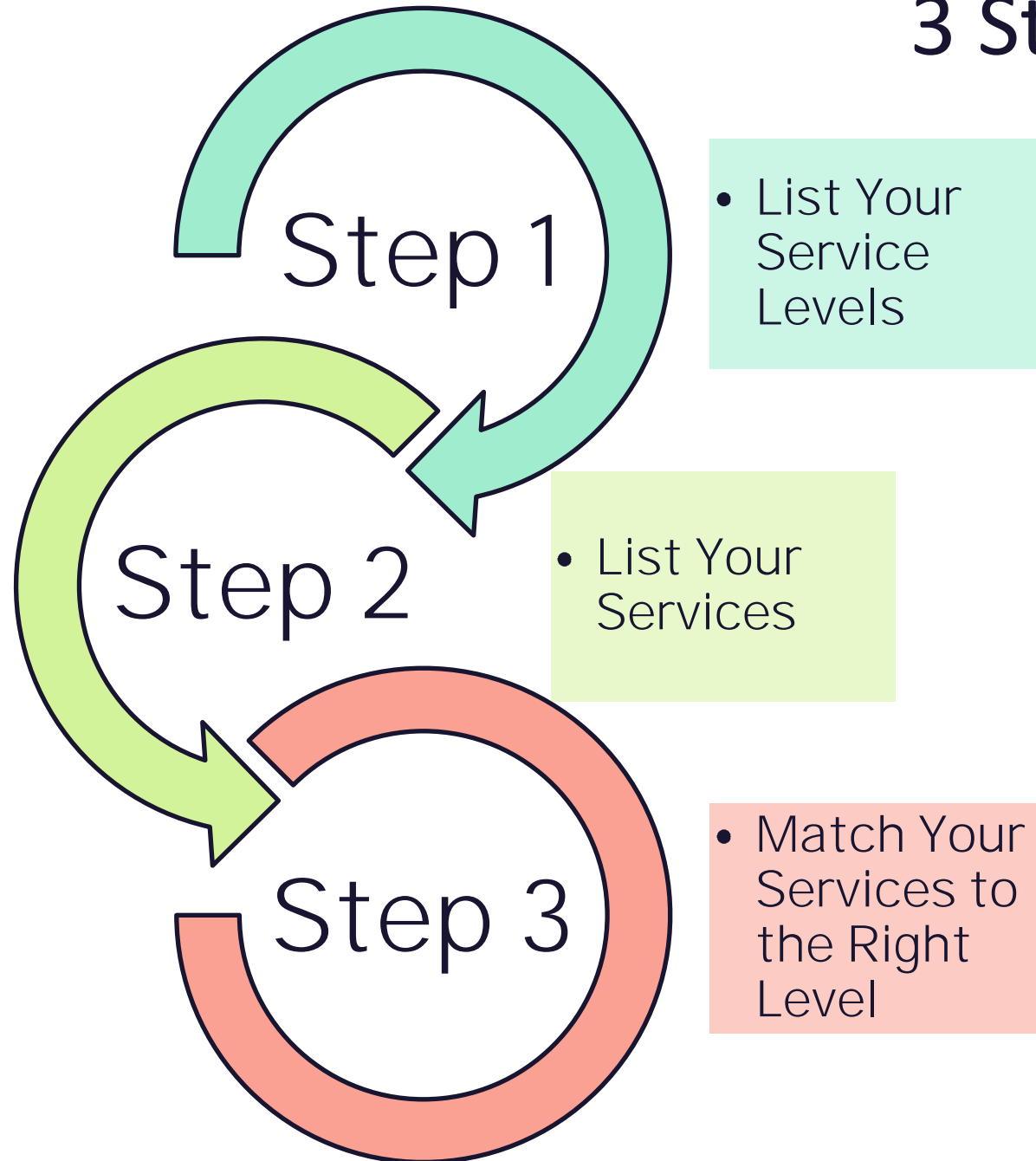
Services

+ ADD NEW SERVICE

Note: Use this to setup a default service - Workflow/Timing Configurations

Service	Description	Lead Time (days)	Frequency	Interval	Workflow	Commands
Client Touch	Client Touch	7	Week	6	SM - Client Touch	 
Lunch Date	Lunch Date	10	Year	1	SM - Lunch Date/Meeting	 
Meeting	Meeting	14	Year	1	SM - Meeting	 
Special Interest Article	Article	14	Month	2	SM - Special Interest Article	 

# 3 Steps to Success



**Atherton - Clark and Elise**

SUMMARY | DETAILS | WORKFLOWS | FINANCIALS | OPPORTUNITIES | DOCUMENTS | NOTES | EMAILS | INTEGRATIONS

Reminders

### Atherton - Clark and Elise

SERVICE LEVEL: Service Level

ADVISOR 1: Tricia Cameron

ADVISOR 2:

CSR:

HOME ADDRESS: 600 Old Farmstead Way, Spearville, KS 67876

No Mail

HOME PHONE: (620) 422-2230

HOME EMAIL: iraisecows@

CLASSIFICATIONS: CLIENT

TAGS: FINANCIA...

AUM: \$0.00

LAST MEETING:

CLIENT ANNIVERSARY: 10/02/2020

ORION ID:

### Clark

CLARK ATHERTON

CLIENT

DATE OF BIRTH: 08/20/1975

AGE: 46.5

SSN:

HOME ADDRESS: 600 Old Farmstead Way, Spearville, KS 67876

CELL PHONE: (620) 422-2230

HOME EMAIL: iraisecows@email.net

### Elise

ELISE ATHERTON

CLIENT

DATE OF BIRTH: 03/07/1978

AGE: 43.9

SSN:

HOME ADDRESS: 600 Old Farmstead Way, Spearville, KS 67876

CELL PHONE: (620) 422-2231

HOME EMAIL: imilkcows@email.net

COMMUNICATION PREFERENCE: Text

INTEGRATIONS: Constant Contact ACTIVE

The Service Monitor for the record will be changed - are you sure you want to do this?

CANCEL CONFIRM



# Set the Next Due Date

Grid < > Home Atherton - Clark and Elise 📄 📧 ⚙️ TOOLS

SUMMARY DETAILS WORKFLOWS FINANCIALS OPPORTUNITIES DOCUMENTS NOTES EMAILS INTEGRATIONS

### Workflows > Service Monitors

+ ADD NEW SERVICE

Service	Description	Frequency	Interval	Lead Time (days)	Workflow	Next Due	Commands
Meeting	Meeting - Annual	Year	1	14	SM - Meeting	02/24/2023	
Special Interest Article	Article	Quarter	3	7	SM - Special Interest Article	11/24/2022	

# Complete the Service!

**Status:** Complete **Assigned :** Cameron, Tricia **Type:** Meeting **ID:** 1322  
**Subject :** SM - Meeting

**Linked:** Assets Documents Emails Insurance Opportunities User Defined Fields Calendar

**Notes:** \*

What was discussed:

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Notes:

**Entered By \*** : Cameron, Tricia  
**Created \*** : 01/05/2022 9:22 AM  
**Time Spent** : Minutes  
**Type \*** : Meeting  
**Category** : Meetings  
**Tags** : Select Some Options

**Action Required**

**Assigned \*** : Cameron, Tricia  
**Priority** : Time S...  
**Start Date** :  
**Due Date \*** : 02/10/2022

**Completed**

**Completed by :** Cameron, Tricia  
**Completed on :** 02/10/2022 1:17 PM

**FYI on Save :**   
**Select Group :** Select Group to FYI  
**Viewing :** All

Adv 1  
 Adv 2  
 CSR  
 Addison, Cheryl  
 Cameron, Tricia  
 Hare, Josh  
 Henry, John

**Service Monitor:**

Client Touch | Due: 03/08/22  
 Meeting | Due: 05/10/22  
 Special Interest Article | Due: 03/20/22

**Service(s) Completed:**  
02/24/2022

Standard Detailed

Cancel Save



# Complete the Service!

**Firm Profile**

FIRM INFORMATION | **FIRM PREFERENCE**

CATEGORY

AppSettings

Document Management

Email Configuration

Integrations

MyRepChat

**Subject :** [Input Field]

**Link To**  
Assets Documents Emails Insurance  
Opportunities User Defined Fields Calendar

**Notes \***

**Type \*** : -Select-  
**Category** : -Select-  
**Tags** : Select Tags

**Action Required**  
**Assign To** : -Select-  
**Priority** : -Select-  
**Due Date** : [Input Field]

**Service Monitor**  
Select Service Due By

**Standard Action Form Features**

If checked, the feature will show on the "Standard" action form view. If not checked, the feature will only be visible on the "Detailed" action form view.

- Calendar
- Create a Document
- Send an Email
- Time Spent
- FYI
- Link To
- Priority
- Start Date
- Service Monitor

Reset to Default

**EDIT** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP** **SETUP**

**CANCEL** **SAVE**

# Propagation of Edits

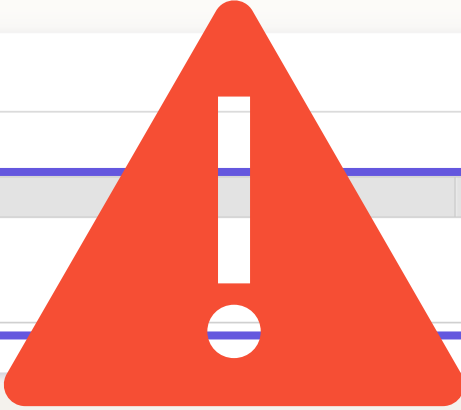
Atherton - Clark and Elise

SUMMARY DETAILS WORKFLOWS FINANCIALS OPPORTUNITIES DOCUMENTS NOTES EMAILS INTEGRATIONS

Workflows > Service Monitors

+ ADD NEW SERVICE

Service	Description	Frequency	Interval	Lead Time (days)	Workflow	Next Due	Commands
Meeting	Meeting - Annual	Year	1	14	SM - Meeting	02/24/2023	
Special Interest Article	Article	Quarter	3	7	SM - Special Interest Article	11/24/2022	



# Record-level Work

Atherton - Clark and Elise

SUMMARY   DETAILS ▾   WORKFLOWS ▾   FINANCIALS ▾   OPPORTUNITIES   DOCUMENTS ▾   NOTES   EMAILS   INTEGRATIONS ▾   TOOLS

Workflows > Service Monitors

[+ ADD NEW SERVICE](#)

Service	Description	Frequency	Interval	Lead Time (days)	Workflow	Next Due	Commands
Meeting	Meeting - Annual	Year	1	14	SM - Meeting	02/24/2023	
Special Interest Article	Article	Quarter	3	7	SM - Special Interest Article	11/24/2022	



# Record-level Reporting

Atherton - Clark and Elise

SUMMARY DETAILS WORKFLOWS FINANCIALS OPPORTUNITIES DOCUMENTS NOTES EMAILS INTEGRATIONS

Workflows > Service Monitors

+ ADD NEW SERVICE

Service	Description	Frequency	Interval	Lead Time (days)	Workflow	Next Due	Commands
Meeting	Meeting - Annual	Year	1	14	SM - Meeting	02/24/2023	
Special Interest Article	Article	Quarter	3	7	SM - Special Interest Article	11/24/2022	

# Global Level Reporting

**Records** Add Action Email Documents **Reports** Add Record Settings

0 SELECTED ALL PAGE NONE # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z - ALL

Drag a column header and drop it here to group by that column

	RECORD NAME ^	PHONE PRIMARY RECORD	EMAIL RECORD	SERVICE LEVEL	ADVISOR 1	AUM	FIRST NAME PERSON 1	FIRST NAME PERSON 2	ACTION DATE
+ <input type="checkbox"/>	51 Anthropologie	(555) 666-4444	pres@anthropologie.com		Tricia Cameron	\$0.00	Gina		
+ <input type="checkbox"/>	ABC 401k Plan	(432) 555-4545 x	jjones@abc401kplan.com		John Henry	\$0.00	Julie		
+ <input type="checkbox"/>	Andrews - George & Sally	(555) 555-0000	Home@home.net	Platinum	Tricia Cameron	\$13,614,954.66	George	Sally	
+ <input type="checkbox"/>	Andrews - Jeff	(555) 555-4321 x	JeffAndrews@email.com		John Henry	\$0.00	Jeff		
+ <input type="checkbox"/>	Andrews Family Trust	(555) 555-5555			Tricia Cameron	\$0.00	Andrews		
+ <input type="checkbox"/>	Atherton - Clark and Elise	(620) 422-2230	iraisecows@email.net		Tricia Cameron	\$0.00	Clark	Elise	
+ <input type="checkbox"/>	Austin - Geoff and Sarah	919-555-1212	Geoff@Austinfirmllc.net		John Henry	\$0.00	Geoff	Sarah	
+ <input type="checkbox"/>	Austin Tools Company Inc	310-656-5656	Info@Austintoolscoinc.com		John Henry	\$0.00	Geoff		4/12/2021
+ <input type="checkbox"/>	Barnes - Deborah	(555) 555-9876 x	DBarnes@email.com		John Henry	\$0.00	Deborah		8/23/2021
+ <input type="checkbox"/>	Barnes - Richard	(919) 846-7187	RichBarnes@email.com		Tricia Cameron	\$0.00	Richard T.		7/23/2021
+ <input type="checkbox"/>	Beck - Gwendolyn	(934) 224-4466	foodislife@net.net		Tricia Cameron	\$0.00	Gwendolyn		2/24/2022
+ <input type="checkbox"/>	Bennett/Edgerley - Clayton and O...	(843) 477-7788	eatbythewater@bennetts.com	Platinum	John Henry	\$732,000.00	Clayton	Ophelia	2/24/2022
+ <input type="checkbox"/>	Benson - Olivia	(718) 601-1001	cptbenson@nypd-svu.com	Silver	Tricia Cameron	\$0.00	Olivia		2/24/2022
+ <input type="checkbox"/>	Richard - Peter & Olivia	(617) 622-1101	richonfam@gmail.com		Tricia Cameron	\$0.00	Peter	Olivia	6/7/2021

1 2 3 4 > >>

1 - 20 of 70 20

**Reports**

- Meeting Monitor
- Report Assistant
- Report Builder **BETA**
- Service Monitor
- Data Maintenance
  - Time Reports
    - Beneficiary 2022
    - Birthday List 2022
    - Contact Information 2022
    - Email Address 2022
    - Last Contact 2022
    - Phone Number 2022
    - Referral
    - Revenue 2022

# Global Level Reporting

## Service Monitor Reporting

Drag a column header and drop it here to group by that column

RECORD NAME	NEXT DUE	DAYS UNTIL DUE	ASSIGNED TO	ADVISOR 1	SERVICE LE...	SERVICE	FREQUENCY	INTERVAL	AUTO ADDED ACTI...	LAST COMPLETED	LAST COMPLETING...	LAST COMPLETED BY
Carmichael - Abbott and Ophelia	1/20/2022	-35	Cameron, Tricia	John Henry	Gold	Meeting	Quarter	2	1323			
Benson - Olivia	1/21/2022	-34	Addison, Cheryl	Tricia Cameron	Silver	Meeting	Year	1	1334	1/21/2021	515	Tricia Cameron
Andrews - George & Sally	1/25/2022	-30	Addison, Cheryl	Tricia Cameron	Platinum	Special Interest Article	Quarter	1	1341	1/25/2021	1271	Tricia Cameron
Brown - Charles	3/8/2022	12	Cameron, Tricia	Tricia Cameron	Platinum	Client Touch	Year	1	1526	3/8/2021	577	Tricia Cameron
Lawyer - Reginald	3/16/2022	20		John Henry	Gold	Special Interest Article	Quarter	2		9/16/2021	1198	Tricia Cameron
Walters - Fred	3/18/2022	22		Tricia Cameron	Silver	Special Interest Article	Quarter	3		6/18/2021	1018	Tricia Cameron
Voight - Henry	3/20/2022	24		Tricia Cameron	Platinum	Special Interest Article	Quarter	1		1/20/2021	1302	Tricia Cameron
Brown - Charles	3/20/2022	24		Tricia Cameron	Platinum	Special Interest Article	Quarter	1		1/20/2021	1022	Tricia Cameron
Bennett/Edgerley - Clayton and Ophelia	3/20/2022	24		John Henry	Platinum	Special Interest Article	Quarter	1		1/20/2021	1306	Tricia Cameron
Robinson - Mark and Hazel	3/20/2022	24		Tricia Cameron	Platinum	Special Interest Article	Quarter	1		1/20/2021	1023	Tricia Cameron
Voight - Henry	3/20/2022	24		Tricia Cameron	Platinum	Meeting	Quarter	1		1/20/2021	1309	Tricia Cameron
Van Pelt - Schroeder	3/20/2022	24		Tricia Cameron	Platinum	Special Interest Article	Quarter	1		1/20/2021	1021	Tricia Cameron
Van Pelt - Schroeder	3/20/2022	24		Tricia Cameron	Platinum	Meeting	Quarter	1		1/20/2021	1294	Tricia Cameron
Andrews - George & Sally	3/30/2022	34		Tricia Cameron	Platinum	Client Touch	Year	1		3/8/2021	531	Tricia Cameron
Bennett/Edgerley - Clayton and Ophelia	4/6/2022	41		John Henry	Platinum	Meeting	Quarter	1		1/6/2022	1320	Tricia Cameron
Pennington - Chase and Lyra	4/11/2022	46		Tricia Cameron	Platinum	Special Interest Article	Quarter	1		1/11/2022	1337	Tricia Cameron
Carmichael - Abbott and Ophelia	4/20/2022	55		John Henry	Gold	Special Interest Article	Quarter	2		1/20/2021	1217	Tricia Cameron
Lawyer - Reginald	4/29/2022	64		John Henry	Gold	Meeting	Quarter	2		1/29/2021	1275	Tricia Cameron
Robinson - Mark and Hazel	5/3/2022	68		Tricia Cameron	Platinum	Meeting	Quarter	1		2/3/2022	1470	Tricia Cameron
Andrews - George & Sally	5/8/2022	73		Tricia Cameron	Platinum	Meeting	Quarter	1		2/8/2022	1460	Tricia Cameron
Pennington - Chase and Lyra	5/8/2022	73		Tricia Cameron	Platinum	Meeting	Quarter	1		2/8/2022	1310	Tricia Cameron
Brown - Charles	5/10/2022	75		Tricia Cameron	Platinum	Meeting	Quarter	1		2/10/2022	1322	Tricia Cameron
Hayes - Jason	5/15/2022	80		Tricia Cameron	Gold	Meeting	Quarter	2		1/15/2021	1279	Tricia Cameron

# Service Monitor Checklist



- Segment your clients
- List the services you provide
- Create service-specific workflows
- List segmentation and services in the Service Monitor
- Match your services to the appropriate segment
- Add service level tags to records
- Adjust due dates on each record
- Train the staff on how and when to complete services
- Customize your Service Monitor report grid

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Thank You for  
watching

Questions can be addressed to  
[crmtraining@advisorengine.com](mailto:crmtraining@advisorengine.com)

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