REDTAIL UNIVERSITY

Redtail Stylesheet

Contacts

Status:

The highest level used to identify contacts in the CRM. These are mutually exclusive so a contact can only have one status at a time.

Status:	When to Use:
Active Client	A contact that currently has at least one account or policy held with us.

Category:

The second level used to rank contacts. Once they have a status, the category can be used to clarify their rank within the status. Also mutually exclusive so a contact can only have one category at a time.

Category:	When to Use:
AAA	Client has met threshold of AUM, Advocacy, and Attitude.

Source: Where the contact came from.

Source:	When to Use:
Referral	A contact that was referred to us by someone outside of our organization

Servicing Advisor: ______________________________

Advisor Name:	Rep Code:
Hayley Mandrup	4HA

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Writing Advisor: ______

Advisor Name:	Rep Code:
Jonathan Maddock	007

Keyword: Label on a record used to filter and group contacts.

Keyword:	When to Use:
Inherited IRA	When a contact is under 65 years old and has an inherited IRA account

Contact Style Guide: Automate your contact sales cycle.

Status:	Category	When to Use	Automation Triggered
Active Client	A AA AAA	Active Client and A level Active Client and AA level Active Client and AAA level	When status is changed to Active Client, Important Information Workflow links

Activity Types & Categories

Activity Type: The medium in which you are completing the activity.

Activity Types:	When to Use:
Client Review	When a Contact is scheduled to have a review

Category: Subject of the activity, note, workflow, document, etc.

Categories:	When to Use:
Client Review Notes	When an item in the database pertains to a client review

Calendar Style Guide: Most effective when used with automations.

Activity Type:	Category:	When to Use:	Automation Triggered:
Client Review	Client Review Notes	Yearly Client Review	2018 Client Review Workflow