Completed Redtail Style Guide

Contacts Segmentation

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:
Lead	Contact information no interactions with contact
Prospect	Contact information interaction was made with contact
Active Client	Accounts held for contact
Spouse of Client	No accounts held for contact
Dependent	Dependent of "Active Client"
Inactive Client	Accounts / Policies no longer held
Deceased	Deceased "Active or Inactive Client"
Business	A physical building or "four walls and a roof" location, rather than an individual person
Personal	Personal Contacts (Friends, Family who are not clients)
Not Specified	Needs assigned Status

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:
Warm	Contact is new/ less than 180 days old
Cold	No interaction from contact in 180+ days
Lost	"Do not contact" requested
Hot	Contact scheduled Meeting
Pending	Onboarding process is underway but has not signed officially as Client yet
A	Under 100k in AUM
AA	Over 100k and under 500k in AUM
AAA	Over 500k in AUM
Personal Client	Personal friend, employee of firm, family member, etc. No required AUM.
Child Dependent	child of a current client
Grandchild	Dependent grandchild of a current client
Other)	Dependent of a current client (example: parent where client is POA
Business Relationship	COI, Attorney, CPA, or other industry relationship
Business Vendor	Contact provides services to firm (example: Redtail Technology, Broker Dealer, etc.)
Business Wholesaler	Fund company
Client's Employer	Employer of current Client
Contact	Personal contacts (examples: friends, family, etc.)

Source: Where the contact came from.

Source:	When to Use:
Existing Client	Client was an original part of the book of business or source is unknown
Internet Lead	Web search or internet ad
Marketing List	Purchased marketing or lead list
"Organization"	Examples: Rotary Club, Lions Club, Toastmasters, Dave Ramsey, Broker Dealer, etc.
Radio Lead	Radio show or ad
Referral	Referred to firm by a person or business
Seminar	Event was attended as initial interaction with firm

Servicing Advisor: The primary advisor for the client. Can also be the only advsior or the senior advisor.

Advisor Name:	Rep Code:
Tucker McLaughlin	5W3, 6J1, 9K7
Rick Williamson	3L2

Writing Advisor: The secondary advisor for the client, or in insurance cases, the underwriter. Can also be the only advisor's name listed here in addition to in Servicing Advisor or the junior advisor name.

Advisor Name:	Rep Code:
Jonathan Maddock	007
Curtis Ware	5U7

Permissions: Applied to contacts based on the Servicing Advisor.

Servicing Advisor:	Permissioned to Team:	Automation Triggered:
Tucker McLaughlin	Tucker's Team	"Permission Client to Tucker's Team" adds permissions based on Servicing Advisor = Tucker to appropriate team.
Rick Williamson	Rick's Team	"Permission Client to Rick's Team" adds permissions based on Servicing Advisor= Rick to appropriate team.
<no servicing advisor>	<Everyone can view contact>	

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

Keyword:	When to Use:
FeeBased	Client who has a feebased structure
Hourly	Client Client who has an hourly fee structure
Life Insurance Client	Client who has a life insurance account
Admin Will	Client has a will on file
Beneficiary	Contact is a designated Beneficiary
Contact–Do Not Mail	Contact cannot or does not want physical mail
Event Golf	Client interested in golf event

Contact Style Guide: Automate your contact sales cycle.

Status:	Category	When to Use	Automation Triggered
Lead	Warm	Name and Contact Information	"Prospecting Cadence" links Prospecting Workflow
	Cold	No contact made over period of time	
	Lost	Contact has no interest	
Prospect	Hot	Contact scheduled meeting	
	Cold	Meeting held, no further contact	
	Lost	Contact not a good fit/not qualified	
	Pending	Contact scheduled Onboarding Meeting	
Active Client	A	AUM under 100k	"New Client Checklist" links Important Information Workflow when Status is changed to Client and Category = A, AA, or AAA
	AA	AUM over 100k / under 500k	
	AAA	AUM over 500k	
	Personal Client	Friend / family / employee with accounts	
Spouse of Client	(same Category as Head of Household)	No accounts held for Contact	

(continued...)

Status:	Category	When to Use	Automation Triggered
Dependent	Child	Dependent of "Active Client"	"Important Information for Children of Clients" links Important Information workflow
	Grandchild	Dependent of "Active Client"	
	Other	Dependent of "Active Client"	
Inactive Client	(same Category as when Active)	Accounts no longer held	
Deceased	(same Category as when Active)	Contact has passed away and was "Active" or "Inactive"	"Deceased Client Notification" emails all users notification upon Status change
Business	Business Relationships	COI, Attorney, CPA, or other industry relationship	"Set Status for Business Contacts" fills out Category based on Contact Status and Type
	Business Vendor	Contact provides services to firm (example: Redtail Technology, Broker Dealer, etc.)	
	Business Wholesaler	Fund company	
	Client's Employer	Employer of Current Client	
Personal	Contact	Personal Contacts	
Not Specified	<no category>	Needs Assigned Status	

Notes, Activities, Documents, etc.

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

Activity Types:	When to Use:
Appointment	Scheduled days/times with Clients/ Prospects
Holiday	Holidays
Meeting	Internal scheduled days/ times (not with Clients/ Prospects)
Task	Internal to-do Items
Out of Office	Time off, vacation, or working remote
Personal	Personal items on calendar
Phone Call	Phone calls
Unassigned	<Needs assigned Activity type>

Calendar Style Guide: Most effective when used with automations.

Activity Type:	Category:	When to Use:	Automation Triggered:
Appointment	Client Lunch	Business meeting over lunch	
	Client Meeting	Meeting with a Client	
	Client Review	Annual/SemiAnnual/Quarterly Client Review	"Client Review" links workflow on activity add
	Onboarding—1st Appt	1st Onboarding Meeting	
	Onboarding—2nd Appt	2nd Onboarding Meeting	
	Onboarding—3rd Appt	3rd Onboarding Meeting	
Holiday	General Information	Holidays	
Meeting	Customer Service	Internal meeting for Client Service Team	
	General Information	Office meeting	
	Important Conversation	Meeting requiring documentation	
Task	Customer Service	Task executed by Client Service Team	
	Email Received	Incoming Email	
	Email Sent	Outgoing Email	
	General Information	General office to-do item	
	Pending Item	Action needed	
	Policy Support	Compliance item	
	Technical Support	Internal IT	
	Underwriting Information	Underwriting todo	