



Metrics & Call Reporting for CSAs & Appointment Setters (Redtail)

If you have an appointment setter or client service advisor in your office, chances are you've had a conversation with David Scranton or Teresa Mariconda about utilizing your CRM to track staff results. This is especially needed if you're planning an agency.

Any job based on outbound calls should be tracked internally. The most efficient way is within your CRM. This will reduce your time spent micromanaging/monitoring your staff and you will have numbers you can look at every week to help coach them.

The appointment setter and client service advisor are both roles that require outbound calling and are integral in helping your business grow. It's important to keep a close eye on both these roles.

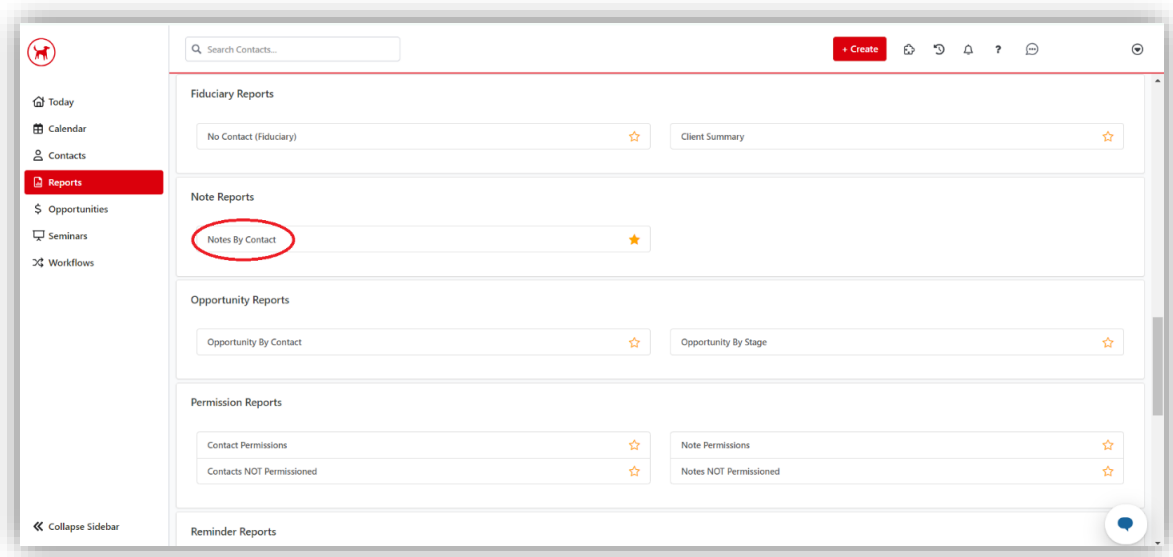
Sample Weekly Measurables

See below sample measurables that give you a bird's eye view of how each staff member works within their role.

Measurables for Appointment Setters		
Title	Goal Direction	Goal
Sales Calls	>=	150
Scheduled Sales Appointments	>=	7
Kept 1st Appointments between each Advisor(s)	>=	6

Measurables for CSAs		
Title	Goal Direction	Goal
Calls per week	>=	25
Opportunities identified weekly	>=	\$250,000
Business written per week	>=	\$180,000
Appointments set per week	>=	6
Referrals per week	>=	5

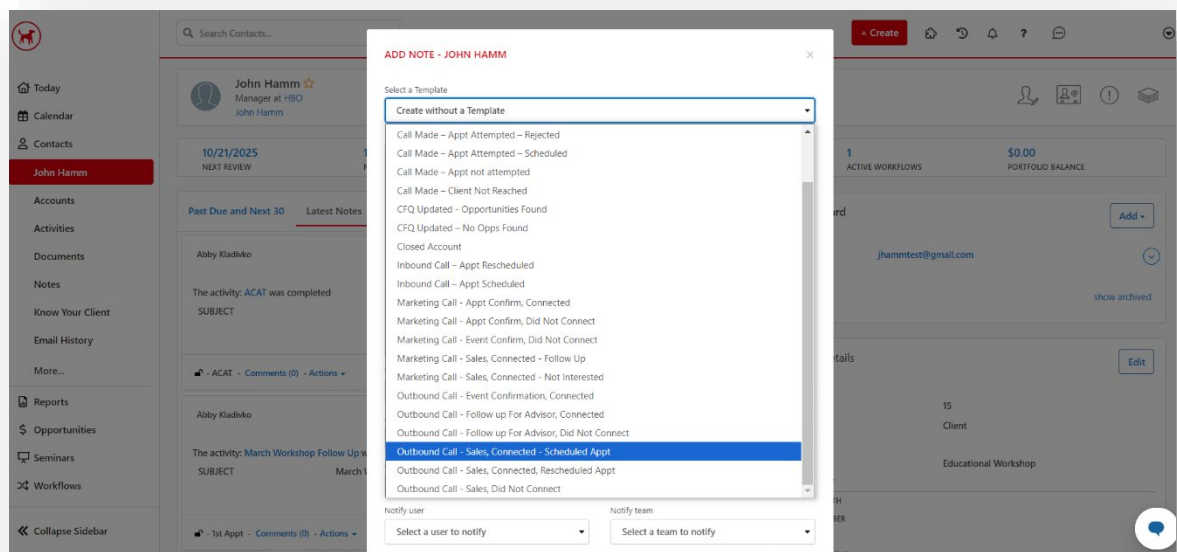
In the Redtail CRM, you simply need to use Note & Activity Categories so team members can pull reports using the Note Report under Reports within minutes:



By inputting notes for every call, they'll be able to pull an Excel report of all the calls being made and tally them up, like below:

Category	Count of Category
Outbound Call - Sales, Did Not Connect	37
Outbound Call - Appt Confirmation, Did Not Connect	27
Outbound Call - Event Confirmation, Did Not Connect	20
Outbound Call - Appt Confirmation, Connected	17
Outbound Call - Event Confirmation, Connected	14
Outbound Call - Sales, Connected – Asked For And Scheduled Follow-Up	3
Outbound Call - Sales, Connected – Not Interested	2
Outbound Call - Follow up For Advisor, Connected	1
Grand Total	121

If they are logging their calls correctly, the entire process should take minutes each week to do. A quick method to input these notes correctly is by using Note Templates:



Getting Started:

Redtail Help Desk Articles

- [Redtail Article – Setting Up Categories](#)
- [Redtail Article – Setting Up Note Templates](#)

Sound Income Academy has created style guides to make this process even easier:

- [SIA Note Categories Style Guide](#)
- [SIA Note Templates Style Guide](#)
- [SIA Video Tutorial – Setting Up Call Reporting](#)

Don't use Redtail as your CRM? No problem! Most CRMs have similar reporting (Wealthbox, Salesforce, HubSpot). Download our style guides and reach out to your CRM Support to get the process implemented.

Monitor & Adjust

Any practice management changes within your firm must be monitored and adjusted to your current practices. The staff members must record all call data within the CRM and label the activities and notes properly for this to work. Here are some tips below for accomplishing this:

1. **Owner Buy-In:** The business owner must believe that this will help their firm.
2. **Employee Buy-In:** Staff must see the benefits of changing their processes.
3. **Management:** These reports must be monitored weekly (i.e., required for weekly meeting prep)
4. **Adjust:** We've created guides for you, but you'll most likely want to make adjustments to fit your office. Collaborate with your staff on creating a system that works for you.

If you have any questions or would like to schedule a call, please contact Daniela Araujo at (954) 870-6717 or email her at daraujo@soundincomegroup.com.



500 West Cypress Creek Road, Suite 250, Fort Lauderdale, FL 33309

Phone: (954) 870-6712 | Toll Free: (877) 399-1933

support@soundincomeacademy.com | www.soundincomeacademy.com

Investment Advisory Services are offered by Sound Income Strategies, LLC, an SEC Registered Investment Advisory firm.
Sound Income Academy and Sound Income Strategies, LLC are associated entities.