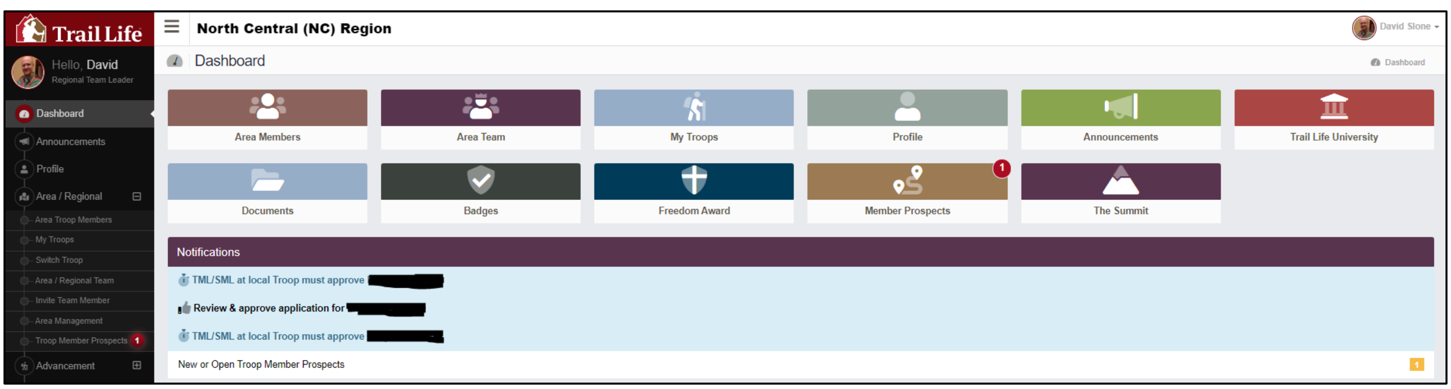
Region/Area Level Find a Troop and Member Prospects Tool

This document provides an overview of the Find a Troop settings and functions of the Member Prospects tool at the Region/Area level. Views shown are from the perspective of the Regional Team Leader. The views and experiences are similar for the Point Man and Direct Service Advisor within the Area level.

Member Prospects Tool

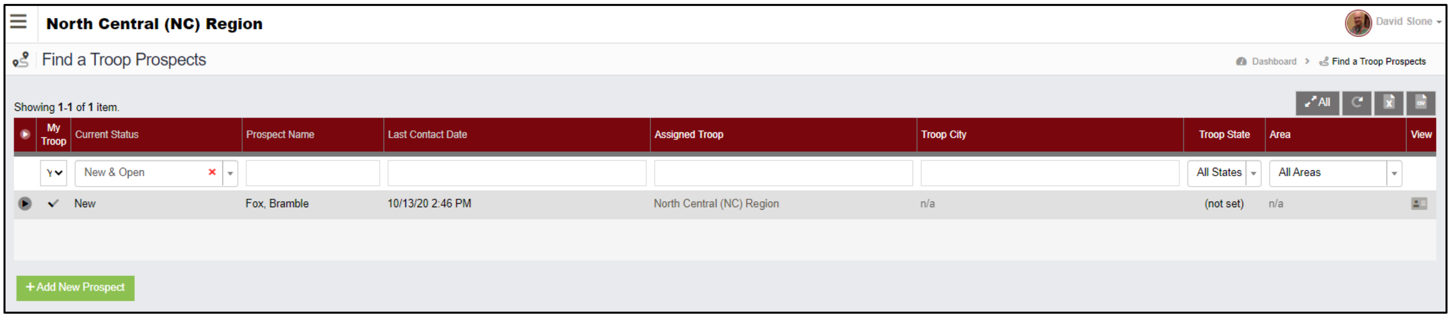
For Region and Area leaders with permissions, the "Member Prospects" tile icon will appear on the Dashboard, as well as a link to "Troop Member Prospects" under the "Area/Regional" section of the left navigation menu. When active prospects are present, a numerical status indicator will alert as to how many are currently present. Additionally, a link under the Notifications section will also indicate how many 'New or Open Troop Member Prospects' are present. Prospects are added to the specific Region or Area list by:

- A Troop transferring a prospect to the Area level Point Man, if the prospect is not the right fit or inquired with the wrong Troop
- Manually adding a prospect within the Member Prospects tool

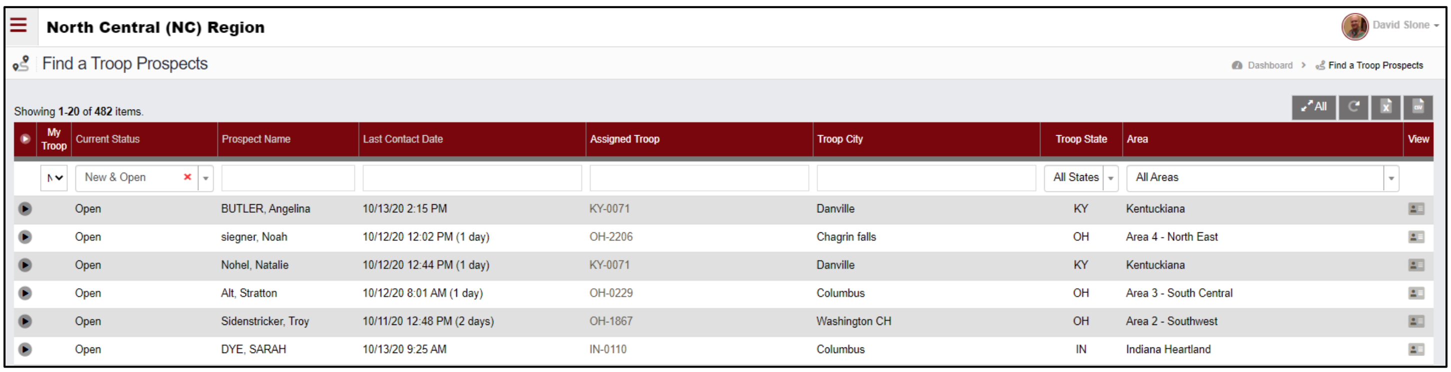


Clicking any of the links to "Member Prospects" will take you into the "Find a Troop Prospects" page, where all member prospects will be listed. You will see columns that show the current status, prospect name, last contact date, assigned Troop, Troop city/state, and the Area. These columns contain sort, filter, and search options so you can locate specific prospects. **An important filter item for the Region and Area level is the "My Troop" column*.

- If set to "Yes," the list will contain prospects who are only assigned to the specific Region or Area shown listed at the top of your page. (In the Ist example below, Bramble Fox is the only current prospect within the North Central Region.)
- If set to "No," the list will contain prospects for all Areas and/or Troops that are within your Region or Area. In the 2nd example below, all prospects within and below the North Central Region are shown.)



Example I. "My Troop" = "Yes". Listed prospect is specific to the current Region level (North Central)



Example 2. "My Troop" = "No". Listed prospects exist below the current Region level (North Central)

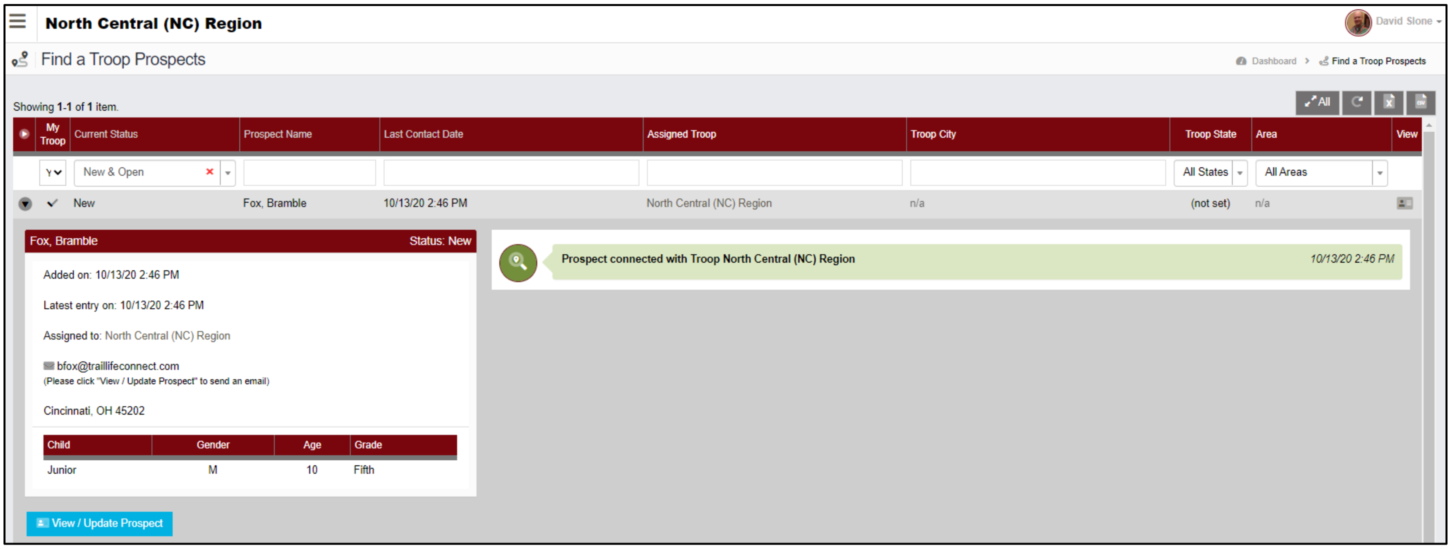
Setting the "My Troop" filter to be blank (neither "Yes" or "No") will show <u>all</u> prospects; both for the specific Region or Area shown at the top *and* every Area or Troop contained below that Region or Area.

Above the prospect lists, on the right side, are options to export the prospect list to Excel or CSV files, if you wish to view and work with the list offline. The export will reflect whatever is on-screen, including any filtering currently active.

The default status filter option is set to "New & Open." You can change this status via the drop-down menu to view any prospects who are "On-Hold," as well as any prospects who have previously been "Closed."

At the bottom of the list of prospects, you will find the green button to "Add New Prospect." (See **1st example** above.) This is where you can manually add a prospect to the list that did not come through the system via a Find a Troop inquiry. For example, if you learn of prospective members through other means (conversation, phone call, email, etc.) For the individual who is a specific Regional Team or Area Team prospect, this would be one of the primary ways of adding them into the prospect queue. If the prospect is for a Troop in your Region or Area, you can add them here first, then transfer them to a specific Troop using the actions within the prospect record (covered later.)

Clicking the expand icon to the left a prospect record  will provide a preview of: their information, the communication history, and a button to click to view more details or make updates to the prospect record.



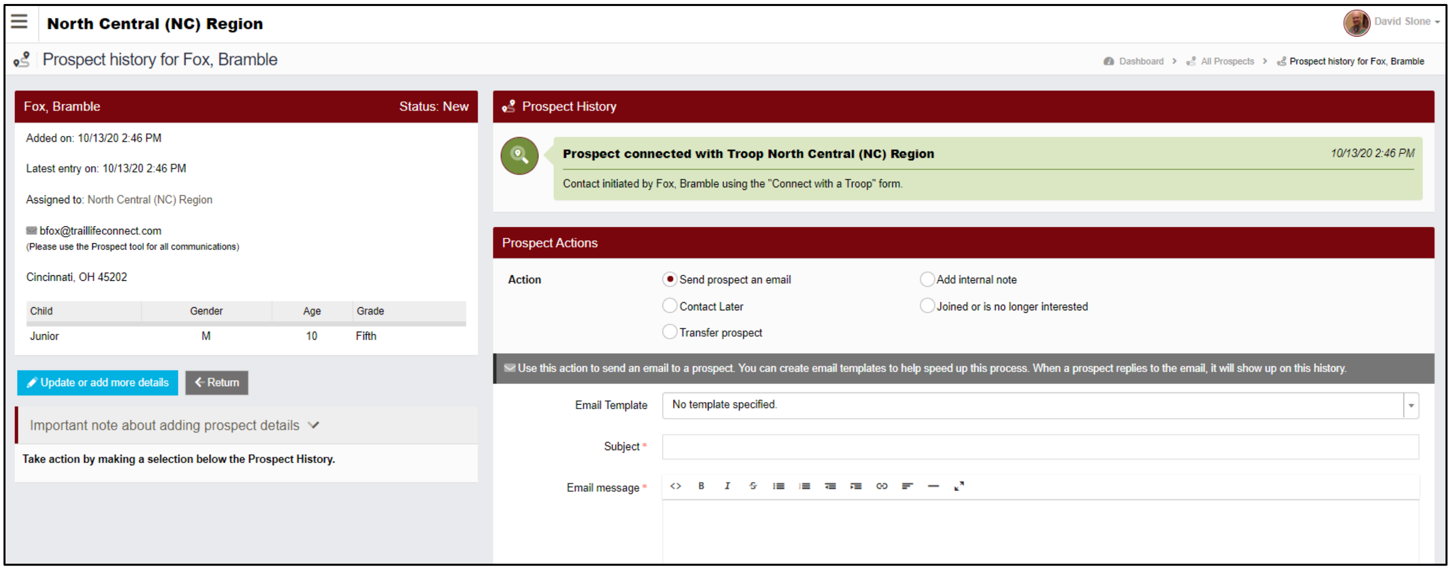
The "Last Contact Date" column shows you when you, or someone in one of your Troops, last made contact with the prospect. Contact with each prospect should be initiated within the Member Prospect tool (by clicking to "View/Update Prospect" and choosing to email them, or add notes to the history.) If the prospect is contacted outside of the tool, the system has no way of knowing that contact was made – it is important to keep communication up-to-date and flowing within the tool.
As time passes, the number of days will increase since the last contact. If 7 days pass with no contact recorded in the tool, that prospect record will turn orange in the list (to visually show it has been a week or more.) If 14 or more days pass with no contact recorded in the tool, that prospect record will turn red in the list (to visually show a greater sense of urgency and need to make contact.) Email notifications have also been configured to notify key leaders if a prospect is not being contacted in a timely manner.
Within Troops, email notifications are configured as follows:

- If 7 days pass, the Core Leaders of the Troop are notified of the time elapsed since last contact
- If 14 days pass, the Area Point Man is also notified of the time elapsed since last contact
- If 21 days pass, the Regional Team Leader is also notified of the time elapsed since last contact
- If 28 days pass, the Home Office is also notified of the time elapsed since last contact

Each time an Area or Troop leader contacts the prospect, the counter resets to zero days. The goal is to not allow a prospect to go longer than 7, 14, 21, or 28 days with no contact. These notification safeguards are in place to ensure that a potential Troop prospect does not get missed or fall through the cracks, but instead locates a Troop they can join.

Viewing/Updating a Prospect

When viewing the list of prospects, you can either click the "View" icon to the right of their record in the list or click the "View/Update Prospect" button if you've expanded their record. This action will take you from a summary view of their information into the details of their prospect record and allow you to view more information, as well as make any updates or take an action.



If you need to update the prospect information, including adding youth names and ages, you can click the "Update or add more details" button. Having youth information listed on the prospect record can be helpful later if/when the prospect decides to join a Troop (see the Troop focused Member Prospects document for more details.)

On the right side, you will see a more detailed view of the Prospect History – all emails and notes will be documented here, with color coding to quickly identify what is an email, note, etc. Beneath the History are all of the available actions you can take with the prospect. On the left menu of Trail Life Connect, under "Troop Settings," you will find an option to "Update Email Templates." In this section, you can create standard email templates to use with new prospects. You can select and use these templates during your communications to save time.

Each of the "Action" items are listed below, with a description of what each does as well as other relevant notes:

1. **Send prospect an email**
   Use this action to send an email to a prospect. You can create email templates to help speed up this process. When a prospect replies to the email, it will show up on this history.
2. **Contact Later**
   Use this action if now is not the right time, and you want to re-engage this prospect at a later date. This action disables all dashboard and email reminders until the date you specify. Note that you can still send and receive emails or add notes even if the prospect is on-hold.

3. **Transfer prospect**
   If the prospect is not going to serve on your Region or Area team, or if the prospect was transferred to you by a Troop, you can use this option to transfer them to a more appropriate Area or to a Troop that may be a better fit. Add notes regarding the reason for the transfer.
4. **Add internal note**
   You can use this action to document an encounter, such as a phone call, or to add other information about this prospect. Note that additional details about the prospect, such as their address, or names and ages of their children should be added under "Update or add more details."
5. **Joined or is no longer interested**
   Use this action to stop the communication process with this prospect. This usually is done if the prospect joins your Region/Area, or if they indicate that they are not interested. (You will still have access to this record and can re-open it at a later time.) When choosing this option, a reason must be provided. The following options can be selected:
   - Joined my Troop
   - Joined a different Troop
   - Sons not old enough yet
   - Not interested
   - Did not respond to communication
   - Joined area team as volunteer
   - Would like to start a Troop
   - Other (please specify)

When a prospect joins, or is no longer interested – upon choosing that option, their prospect record is closed. If at any time there is renewed interest by the individual or family, you can go to the list of prospects on the "Find a Troop Prospects" page and change the "Current Status" column to "Closed" in order to view former prospects. The "Closed" record can be re-opened and interacted with, as needed.

If a prospect decides to join your Region or Area team, you can add them before (or after) closing the prospect record by clicking "Invite Team Member" on the left menu of Trail Life Connect under the "Area/Regional" section. If they are invited after closing, be sure you to make note of their name and email address so the invitation contains accurate information. (You can also access the closed prospect to obtain this information.)

*As a final note – remember, as a Region or Area leader, you have the ability to navigate between different Troops and/or Areas. Many Region and Area leaders also frequently hold multiple roles on Area teams, and sometimes even have roles within a Troop. The prospects you are able to view will depend upon (1) the current Role you are under and (2) the Region, Area, or Troop you are currently operating within. If a prospect is listed at the Region level, but you are currently logged in as a Point Man in an Area, you will not be able to view that prospect (unless you switch to the RTL role for the specified Region.) Likewise, if you are a Point Man, and have a prospect that was sent to your Area, but you are currently switched to viewing a Troop within your Area – you will not be able to view the Area prospect until you switch to the Area level (and the specific Area where the prospect is listed.) If you ever encounter an error page when trying to click an email link to a prospect, or if you are having trouble locating a specific prospect you've viewed previously, be sure to check both of these key items: your current role, and the current Troop/Area or Region you are operating within.