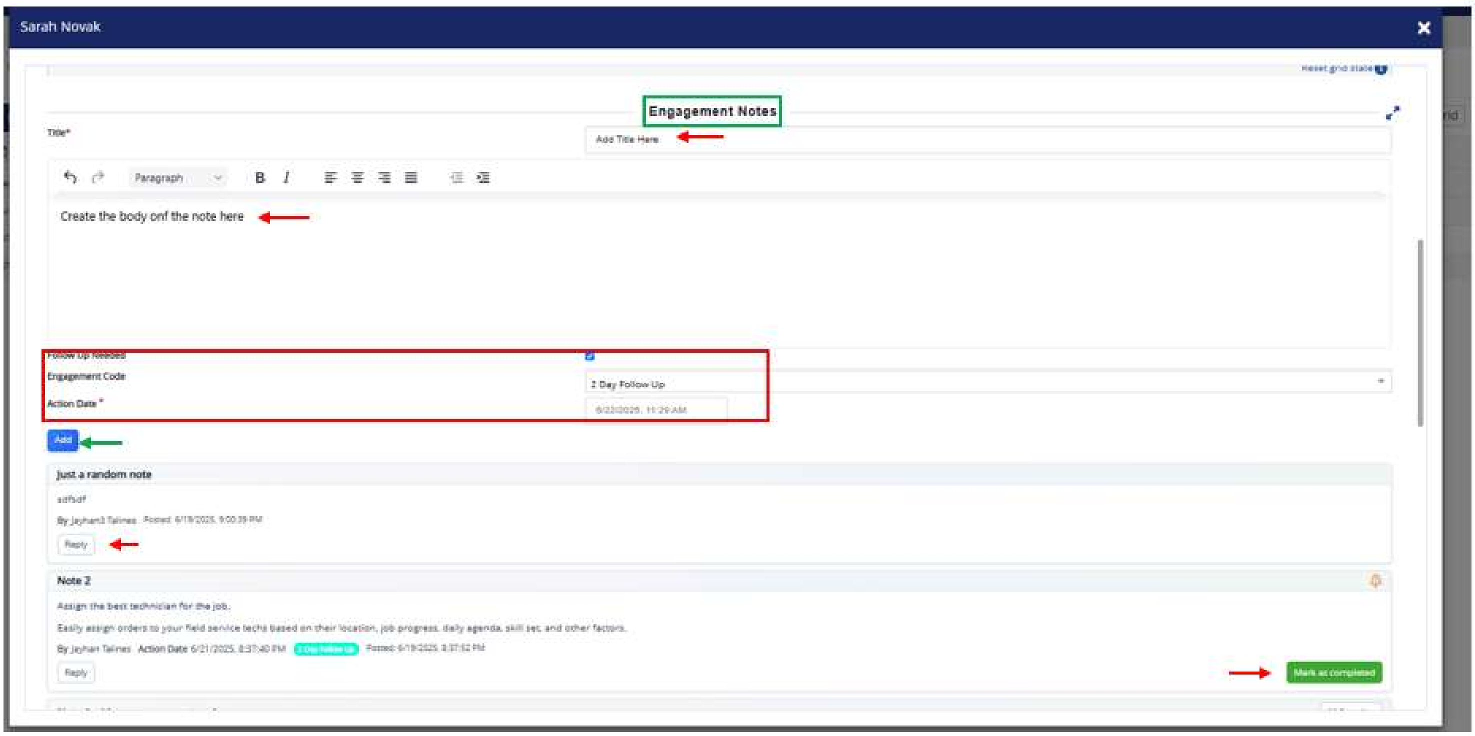
Prospect Management: Engagement Notes

Last updated by | David Mishler Gomocha | Jul 15, 2025 at 9:56 AM EDT

Prospect Management: Engagement Notes

40478 **As an FSP Portal user, I want to create and manage engagement notes with follow-up actions on prospect and customer records** | Done



Recording

[40478 - Prospect and Customer Engagement Notes video capture.mp4]

Description

Users can track follow-up actions on customers and prospects. Capture the notes from the interactions and it will provide your team with the timeline of engagements.

Sales and service staff can log follow-up activities—such as calls, tasks, and reminders—against Leads, Prospects, and Customers.
A new dashboard widget provides real-time visibility into key follow-up metrics, including:

- **Open follow-ups** categorized by **Reason Code** and **Days Since Last Attempt**

- **Tasks due today**
- **Stalled Prospects**
- **Open Quotes**

Value

- Stay on top of every lead with structured follow-ups. Smart reminders and reason codes ensure consistent contact, turning more site visits into service contracts. Your entire team knows exactly who needs attention and when.

- This feature provides a centralized space to log follow-up tasks and capture detailed notes from calls, emails, and meetings—ensuring that all interactions are documented, actionable, and accessible to relevant stakeholders.

- Additionally it:

  - Improves follow-up reliability and deal velocity
  - Reduces knowledge loss across handoffs
  - Enhances personalization in customer communication
  - Supports team transparency and reporting

Gomocha Pillars

- **Efficiency**: Centralizes follow-up data to streamline workflows and reduce oversight.

- **Flexibility**: Adapts to different team roles and sales cycles with customizable filters.

- **Enablement**: Equips staff with actionable insights to prioritize outreach and close deals faster.

- **Performance**: Boosts responsiveness, improves follow-up consistency, and increases conversion rates.

Main Flow/Use Steps & Output

- Gomocha FSP Portal > Customer Management > Customers > Search Customers_ >Open a **Prospect or Customer** record.

- Scroll to **Engagement Notes View Notes Overview:** The system displays a **reverse chronological list of notes** related to the selected record.

- **Create New Note:**

  - Enter a **Title** and **Note Body**.

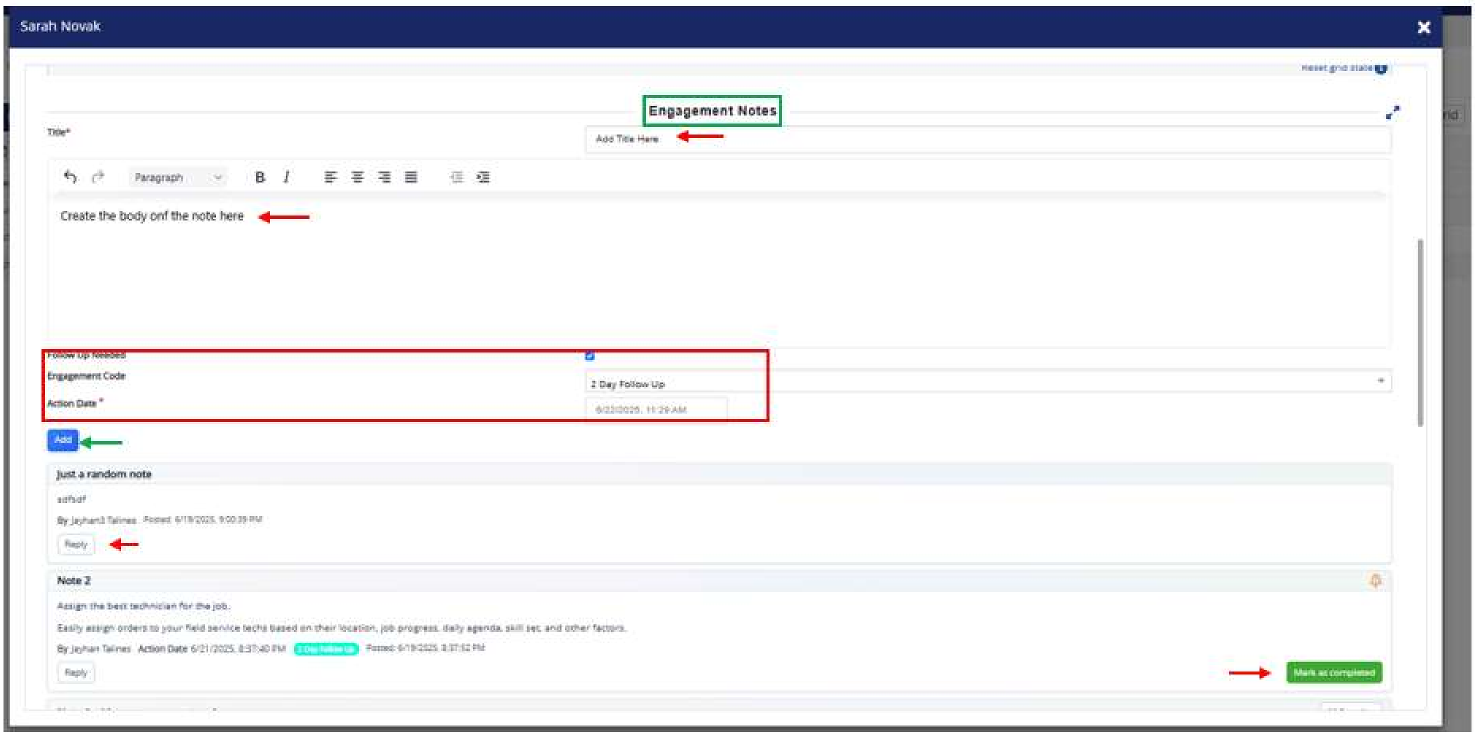
  - Optionally fill in the following fields:

    - **Action Date**

    - **Engagement Code**

    - **Follow-Up Needed** (auto-assigned based on input):

- Set to **“Not Needed”** if both Action Date and Engagement Code are empty.
    - Set to **“Needed”** if both fields are populated.
- Click Blue **ADD** button: The button will only be available if all necessary fields have been completed
- **Notes Overview Refresh:** The system **refreshes the list of notes**, displaying the newly saved note at the top.
- Once note has been added Users can:
  - Reply to notes
  - Mark as completed according to engagement codes or action dates



Reporting

- New report shows open follow-ups by Engagement Code and Days Since Last Attempt, To-Do Today, Stalled Prospects, Open Quotes.

Organisation: GoDemo - Acc
Created by:
Creation date: 2025-06-20

Prospect management - rate conversion from prospect to customer

Customer	Email	Phone	Reason	Last Attempt	Days since
Amstel	lnavarro@gomocha.com;jtalines@gomocha.com	555-3082326		18.06.2025	2
Amstel	lnavarro@gomocha.com;jtalines@gomocha.com	555-3082326	2 Day Follow Up	18.06.2025	2
Amstel	lnavarro@gomocha.com;jtalines@gomocha.com	555-3082326	5 Day Follow Up	18.06.2025	2
ΨΗΤΟΠΩΛΕΙΟ			5 Day Follow Up	19.06.2025	1
Sarah Novak			5 Day Follow Up	19.06.2025	1
Sarah Novak			5 Day Follow Up	19.06.2025	1
Sarah Novak				19.06.2025	1
ΨΗΤΟΠΩΛΕΙΟ			2 Day Follow Up	19.06.2025	1
Sarah Novak			2 Day Follow Up	19.06.2025	1
Sarah Novak			2 Day Follow Up	19.06.2025	1
ΨΗΤΟΠΩΛΕΙΟ				19.06.2025	1
Sarah Novak				19.06.2025	1
david				20.06.2025	0

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