Chapter 6

Maintain Contact History

6-1. General.

a. Before we get too far in annotating information on the lead or other screens, we need to take a few minutes to understand what your ARISS-RWS Leads-Reports application will do for you. Think of your laptop and the ARISS-RWS Leads-Reports application as taking your prospect data records, appointment mandex, the different paper-based leads lists, schools folders, etc., and putting them all in one location. That is what the ARISS-RWS Leads-Reports application does. Using the laptop, you will automatically receive leads through the replication process, annotate your appointments, record the results of your appointments, schedule future appointments, and maintain all your school information. Instead of searching your desk drawers for the different documents, everything you need is now on your laptop.

b. Now let's talk about the records that you will see in the ARISS-RWS Leads-Reports application. Most records that you will receive through replication will be leads. There are several sources that will provide leads electronically to you. The challenge that you face is: How do you manage so many lead records? This will require you to be aggressive in contacting the leads that are provided and annotating your actions on each record. Sound difficult? It isn't if you understand the application. So let's get started. You already know how to Replicate and should understand how to use the Find screen, so now let's start working those new lead records that you received.

c. The following steps will show how to use the Contact History:

(1) Open the Find screen and select a record.

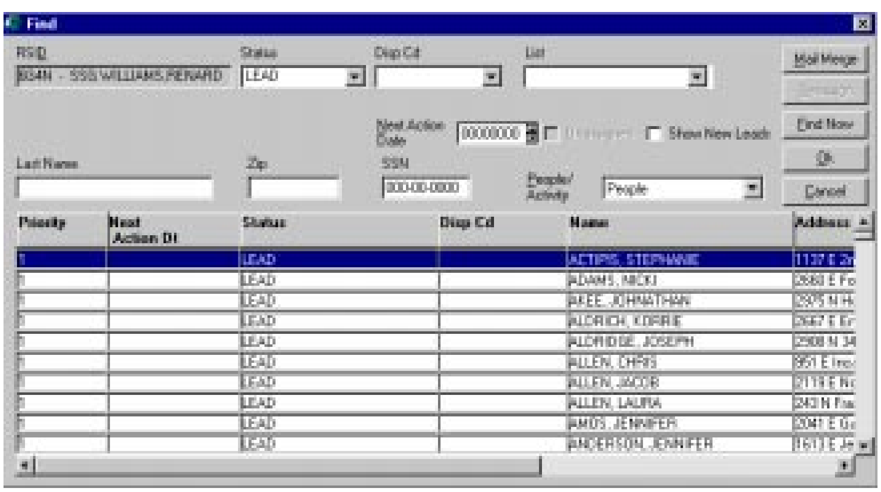
(2) Access the Contact History screen.

(3) Record your contact actions.

(4) Change record status.

6-2. Open the Find screen and select a record.

a. Access the **Find** screen by clicking **Open** under the **File** menu. Sometimes you'll receive a **"No scheduled activities**" message. This means that there are no school activities or functions planned for your assigned schools. The first thing you see are records that need followup. We will assume that you have completed your followup actions and you want to start working your leads.

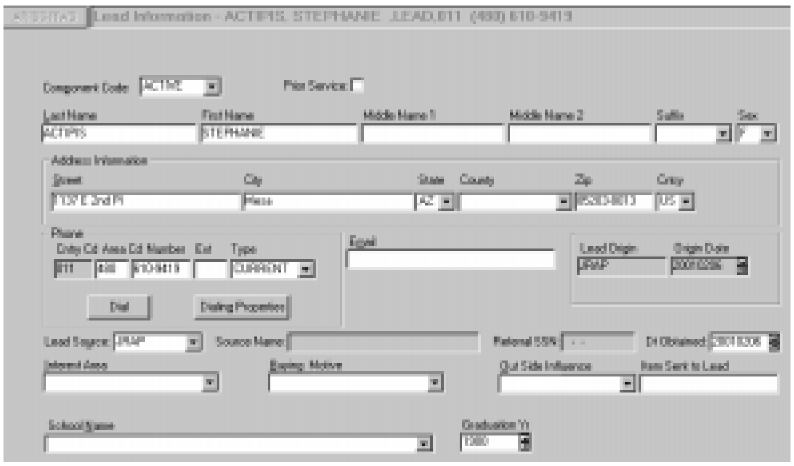


b. Since you want to review the records that are classified as "Leads," go ahead and click **LEAD** from the **Status** drop-down arrow. Change your **People/Activity** window to **People** and click the **Find Now** button to obtain individuals classified as leads.

✔ Remember you can sort the records in ascending or descending order by clicking on the column headers. In this case they are sorted by name.

c. Ever wonder what that priority code 1 or 2 stands for? Priority code of 1 are those leads received from USAREC Advertising, Joint Recruiting Advertising Program, Student Armed Services Vocational Aptitude Battery (SASVAB), and Total Army Personnel Database - Active Enlisted. Priority 2 leads are Total Army Personnel Database - Reserve and Defense Manpower Data Center leads. → change this to what it will be. These codes will change in the near future and each lead source will have its own priority code. This will make it easier to determine where the lead came from. ← no? it will make it easier to access important leads, yes?

d. Highlight the lead you want to contact and then click **Ok**. This will bring you to the **Lead Information** screen. This is probably the most misunderstood screen in the ARISS-RWS Leads-Reports application.



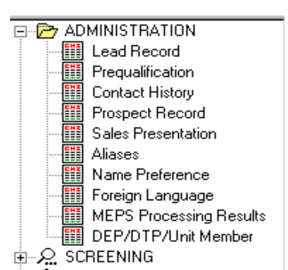
Knowing how to effectively use this screen will make your job easier. Think of your Lead Information screen as a new prospect data record that you just received. But now you are annotating the information on your **Lead Information** screen and later in your Contact History screen. Being able to accomplish this will help you keep interested individuals at the forefront of your recruiting endeavors and to record information that you gather when you speak with an interested individual. Let's take a look at the **Lead Information** screen.

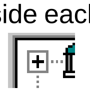
e. A lead record is nothing more than information about a possible applicant. Notice most of this example record is complete, but there will be records that will have information missing. Notice that the ARISS-RWS tab is grayed out and that no other screens are available. The reason is because the **Lead Source** is blank. You must select the **Lead Source** before you can go any further. The drop-down arrow will identify one or more different lead sources that you can select. Click on the drop-down arrow and select the lead source.

f. Review the other information fields on this screen. You'll be contacting this person, so pay close attention to the Interest Area and Buying Motive boxes and if the lead has any Outside Influences, as those will help you to establish rapport with him or her. Click the drop-down arrows and familiarize yourself with the available items.

g. You must save the information on the screen before you can go any further. You can save the information by clicking on **File** and then on **Save** or just click on the **Save** icon.  Once you save the record, the ARISS-RWS tab is now available.

6-3. Access the Contact History screen.



a. Click the **ARISS-RWS** tab to open the application tree to see the functions that are available. You need to become familiar with what screens are available under each tree item. The icon beside each title identifies additional screens that are hidden. Click on the **plus sign**  to display the other available screens. Click on **ADMINISTRATION** and you will see the 10 additional screens that are now available. The one screen that you need to understand is Contact History. Just as you recorded all your actions on the prospect data record, you will now record your actions on the **Contact History** screen. Now click the **Contact History** selection on the menu tree.

b. Notice that the **Contact History** screen does not show any personal information. This screen is only used to record your daily actions that you conducted for this individual. However, the individual's name and telephone number is always displayed at the top of the screen.

c. Before we go further, we need to define what the different statuses are and when to change the status. If you have a question about what the **Status** should be, the information below will help you determine what status to select and at what juncture of processing:

(1) **LEAD:** This is nothing more than a name, telephone number, and/or address of a potential candidate that you will need to contact and determine his or her interests and qualifications to join the Army. The candidate will remain a Lead until they agree to an initial appointment.

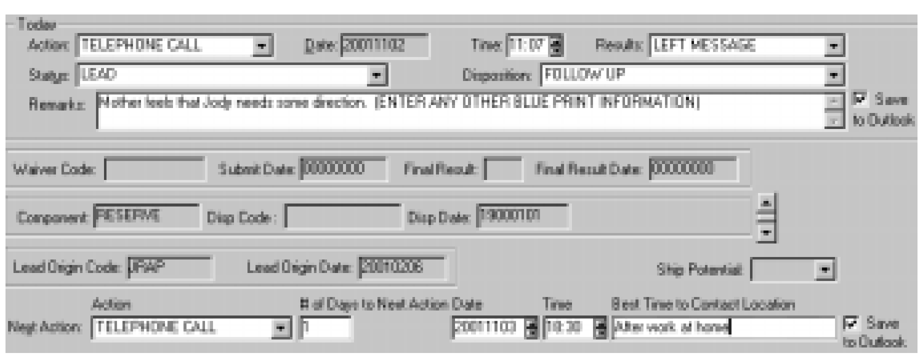
(2) **PROSPECT:** You have contacted this individual and agreed to discuss the programs and options that the Army can provide. He or she has agreed to an initial appointment to discuss these items, but has not agreed to process.

(3) **APPLICANT:** This individual has agreed to start processing for enlistment into the Army. He or she has agreed to test or physical. Remember if he or she agrees to process on their initial appointment, show that in the **ACTION** field.

6-4. Record your contact actions.

a. During your scheduled telephone prospecting, you tried to contact Jody and left a message with the mother. She informed you that Jody would be back tomorrow evening around 1830. She feels that Jody needs some direction in life and should discuss the options that the Army can provide. Now it is time to record your actions in the **Today**'s box. Notice that there is a check box to **Save to Outlook**. By checking this box, the information that you enter in the **Today** fields will be posted to your Outlook calendar. If your calendar is not set up, review chapter 31 on how to set up and use your calendar.

b. Since you were not able to talk with Jody, the **Status** will remain as a **LEAD**, but you want to record that you did make the call. Click the **Action** drop-down arrow and select **TELEPHONE CALL**. Click the **Results** drop-down arrow and select **LEFT MESSAGE**. Since you were successful in making contact with the mother, click on the **Disposition** drop-down arrow and annotate **FOLLOW UP**. You can annotate that you talked to the mother and any other blueprint information in the **Remarks** field. Before you click on **Save**, you want to record your next action. In **Next Action** click on the drop-down arrow and select **TELEPHONE CALL**. You can enter the **# of Days to Next Action Date** and click on the ***Tab*** key and it will change the date or just enter the new date in the **Date** field. Since the mother stated Jody would be home at 1830, enter that time in the **Time** field. If you want to enter the **Best Time to Contact Location**, type ***Home***

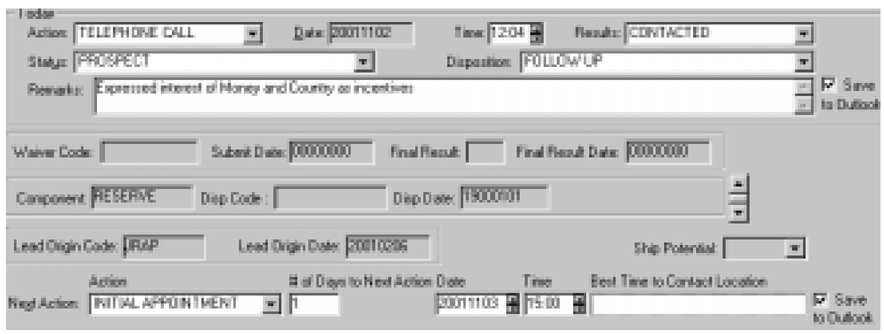


in that field. Again, checking the **Save to Outlook** boxes in the **Today** and **Next Action** fields, those actions will be posted to your Microsoft (MS) Outlook calendar.

c. Now click **Save.** The information that you just entered is now in the **History** box. When you replicate, your SC, first sergeant (1SG), and recruiting company (Rctg Co) commander will be able to see that you made this call.

d. Now, instead of talking to the mother you were successful in talking with Jody and he agreed to an appointment. Jody expressed an interest in hearing more about the military and you identified that two of his interests are money and service to country. Jody agreed to come into the office tomorrow at 1500.

6-5. Change record status.



a. Since Jody agreed to an appointment, he is no longer classified as a lead. The first thing that you have to do is change the **Status** to **PROSPECT**. Then you would select **TELEPHONE CALL** from **Action,** select **CONTACTED** from **Results**, and **FOLLOW UP** in **Disposition**. Summarize your conversation in the **Remarks** field. Don't forget you need to record your **Next Action** information. Since this will be your first appointment, select **INITIAL APPOINTMENT** in the **Next Action** field and record the **Date, Time**, and **Best Time to Contact Location** of the initial appointment. If you notice, there is nowhere to record Jody's interests on this screen except in the **Remarks** field. However, there is a screen where you can record this information and that is on the **Lead Information** screen that you just came from. Now it's time to save all your hard work. You do this by clicking **Save** under the **File** menu or click on the **Save** icon. Again, you will see that the information is now showing in the **History** box. When you replicate, your SC, 1SG, and Rctg Co commander will see that you have an appointment scheduled when they review their Find screen.

✔ Remember to check the **Save to Outlook** box to post the actions you did today and scheduled tomorrow.

✔ Remember, each time that you conduct the first appointment with the candidate, always show the Today's **Action** field with **INITIAL APPOINTMENT**. Every record should show INITIAL APPOINTMENT for the first appointment conducted with the candidate. This is the only way a record will populate to your Applicant Processing List.

b. We have discussed and shown how to annotate the record for someone that may be interested or has made an appointment. For leads that you find temporarily or permanently disqualified annotate your actions in the **Today** fields. Since you have determined they are disqualified there is no need to enter a **Next Action**, but you should explain in detail why they are disqualified in the **Remarks** field. This is more information for your SC. The SC will not have to guess why the lead is disqualified and can approve your action. Records that are shown as permanently disqualified will be removed from your laptop after your SC has approved the action and replicated.

✔ If you have any questions on what should be recorded in the **Today** box, get guidance from your SC.