

Login: **Please log in to your account**

Your Email

Your Password

[I forgot my username or password](#)

Cancel

Go

[Feedback](#)



[Help](#)



[FAQ](#)



Login: **Please log in to your account**

Your Email

Your Password

Sorry, wrong password

[I forgot my username or password](#)

Cancel

Go



Home

System Score | Lead Status | Primary Contact | Resident Name(s) | Attempted Contact

Contact Attempted in the last 3 days Exclude Reset

1	■	Jonnie Patterson	Peggy Patterson	4/09/2018
2	■	Daniel Peletis	Nancy Petelis	4/08/2018
9	■	Frank Coyle	Paddy Coyle	5/16/2018
27	■	Alicia Dooley	Michael Dooley	6/27/2018
3	■	Franklin Geomongie	Mary Geomongie	6/17/2017
4	■	Missy Pruitt	Luke Skywalker Pademe Amadala	8/3/2018
5	■	John Stottlemeyer	Alison Stottlemeyer	9/20/2018
6	■	Kim Baze	Fran Baze	11/14/2018
7	■	Livia Sims	Susan Sims	4/28/2018
8	■	Missy Pruitt	Mark Pruitt	6/17/2017
10	■	Kate Pugh	Aadam Pugh	4/28/2018
11	■	Chris Carey	Kate Carey Steve Carey	6/17/2017
12	■	Bail Organa	Leia Organa	6/17/2017
13	■	Nichole Neale	Mary Katherine Neale	6/17/2017
14	■	Roksana Davie	Suzanna Davie	6/17/2017
15	■	Manveer Phelps	Tushie Phelps	6/19/2017

### Daniel Peletis: Lead ID: 17376542



Attempted Contact: 04/12/2018 | Successful Contact: 04/18/2018 | Sales Phase: Wait List | Expected Move-In: September, 2018 | Lead Status: Hot

#### Primary Contact

YGL

Name: Daniel Peletis  
 Email: dpeletis@gmail.com  
 Relationship to Resident: Son  
 Phone: (630) 372-9987 (Home), (630) 649-0064 (Work), (630) 314-6175 (Mobile)  
 Do Not Call

#### Key Note

Last Updated: 06/09/2018

YGL

Add a new note...

#### Resident(s)

YGL

Name: Nancy Peletis  
 Email: npeletis@comcast.net  
 Age: 85  
 Care Type(s): Assisted Living (A)  
 Location(s): Seattle, WA 98118  
 Budget: \$2,000 - \$2,499 / month  
 Likelihood to Move: 64%  
 Expected Move: January, 2019

#### Tasks

YGL

Due	Priority	Task	Task Details
05/05/18	High	Call Family	HOT - Book the Move
05/15/18	Medium	Outreach	Outreach Followup
06/11/18	Low	\$24000/yr	Needs SLA Task
05/15/18	Medium	Outreach	Outreach Followup
06/11/18	Low	\$24000/yr	Needs SLA Task

#### Reason(s) for Follow-Up

YGL

Family's expected move-in date is the next three weeks  
 Resident needs assistance with activities of daily living  
 Family has visited MySearch or used SLF App in the last week

#### Communities

YGL

Name	Status	Referral
The Sheridan at Tyler Creek	Property Toured	01/10/18
Brighton Gardens of St. Charles	Scheduled Tour	01/12/18
White Oaks of Spring Street	Property Toured	01/23/18

Cancel

Save

Home

System Score | Lead Status | Primary Contact | Resident Name(s) | Attempted Contact

Contact Attempted in the last 3 days Exclude Reset

Rank	Lead Status	Primary Contact	Resident Name(s)	Attempted Contact
1	Hot	Jonnie Patterson	Peggy Patterson	04/09/2018
2	Hot	Daniel Peletis	Nancy Petelis	04/08/2018
9	Hot	Frank Coyle	Paddy Coyle	5/16/2018
27	Hot	Alicia Dooley	Michael Dooley	6/27/2018
3	Warm	Franklin Geomongie	Mary Geomongie	06/17/2017
4	Warm	Missy Pruitt	Luke Skywalker Pademe Amadala	8/3/2018
5	Warm	John Stottlemeyer	Alison Stottlemeyer	9/20/2018
6	Cold	Kim Baze	Fran Baze	11/14/2018
7	Cold	Livia Sims	Susan Sims	04/28/2018
8	Cold	Missy Pruitt	Mark Pruitt	06/17/2017
10	Cold	Kate Pugh	Aadam Pugh	04/28/2018
11	Cold	Chris Carey	Kate Carey Steve Carey	06/17/2017
12	Cold	Bail Organa	Leia Organa	06/17/2017
13	Cold	Nichole Neale	Mary Katherine Neale	06/17/2017
14	Cold	Roksana Davie	Suzanna Davie	06/17/2017
15	Cold	Manveer Phelps	Tushie Phelps	06/19/2017

### Daniel Peletis: Lead ID: 17376542



Attempted Contact: 04/12/2018 | Successful Contact: 04/18/2018 | Sales Phase: Wait List | Expected Move-In: September, 2018 | Lead Status: Hot

#### Primary Contact

Name: Daniel Peletis  
 Email: [dpeletis@gmail.com](mailto:dpeletis@gmail.com)  
 Relationship to Resident: Son  
 Phone: (630) 372-9987 (Home), (630) 649-0064 (Work), (630) 314-6175 (Mobile)  
 Do Not Call

#### Key Note

Add a new note...

Lead Status dropdown menu:

- Hot (Orange square)
- Warm (Dark Gray square)
- Cold (Light Gray square)

#### Resident(s)

Name: Nancy Peletis  
 Email: [npeletis@comcast.net](mailto:npeletis@comcast.net)  
 Age: 85  
 Care Type(s): Assisted Living (A)  
 Location(s): Seattle, WA 98118  
 Budget: \$2,000 - \$2,499 / month  
 Likelihood to Move: 64%  
 Expected Move: January, 2019

#### Tasks

Due	Priority	Task	Task Details
05/05/18	High	Call Family	HOT - Book the Move
05/15/18	Medium	Outreach	Outreach Followup
06/11/18	Low	\$24000/yr	Needs SLA Task
05/15/18	Medium	Outreach	Outreach Followup
06/11/18	Low	\$24000/yr	Needs SLA Task

#### Reason(s) for Follow-Up

- Family's expected move-in date is the next three weeks
- Resident needs assistance with activities of daily living
- Family has visited MySearch or used SLF App in the last week

#### Communities

Name	Status	Referral
The Sheridan at Tyler Creek	Property Toured	01/10/18
Brighton Gardens of St. Charles	Scheduled Tour	01/12/18
White Oaks of Spring Street	Property Toured	01/23/18

Cancel

Save

Home

System Score | Lead Status | Primary Contact | Resident Name(s) | Attempted Contact

Contact Attempted in the last 3 days Exclude Reset

1	■	Jonnie Patterson	Peggy Patterson	4/09/2018
2	■	<b>Daniel Peletis</b>	<b>Nancy Petelis</b>	<b>4/08/2018</b>
9	■	Frank Coyle	Paddy Coyle	5/16/2018
27	■	Alicia Dooley	Michael Dooley	6/27/2018
3	■	Franklin Geomongie	Mary Geomongie	6/17/2017
4	■	Missy Pruitt	Luke Skywalker Pademe Amadala	8/3/2018
5	■	John Stottlemeyer	Alison Stottlemeyer	9/20/2018
6	■	Kim Baze	Fran Baze	11/14/2018
7	■	Livia Sims	Susan Sims	4/28/2018
8	■	Missy Pruitt	Mark Pruitt	6/17/2017
10	■	Kate Pugh	Aadam Pugh	04/28/2018
11	■	Chris Carey	Kate Carey Steve Carey	6/17/2017
12	■	Bail Organa	Leia Organa	6/17/2017
13	■	Nichole Neale	Mary Katherine Neale	6/17/2017
14	■	Roksana Davie	Suzanna Davie	6/17/2017
15	■	Manveer Phelps	Tushie Phelps	6/19/2017

Daniel Peletis: Lead

Attempted Successful



Attempted Contact: 04/12/2018 | Successful Contact: 04/18/2018 | Sales Phase: Wait List | Expected Move-In: September, 2018 | Lead Status: Hot

Primary Contact

Name: Daniel Peletis  
 Email: dpeletis@gmail.com  
 Relationship to Resident: Son  
 Phone: (630) 372-9987 (Home), (630) 649-0064 (Work), (630) 314-6175 (Mobile)  
 Do Not Call

Key Note

Add a new note ...

Resident(s)

Name: Nancy Peletis  
 Email: npeletis@comcast.net  
 Age: 85  
 Care Type(s): Assisted Living (A)  
 Location(s): Seattle, WA 98118  
 Budget: \$2,000 - \$2,499 / month  
 Likelihood to Move: 64%  
 Expected Move: January, 2019

Tasks

Due	Priority	Task	Task Details
05/05/18	High	Call Family	HOT - Book the Move
05/15/18	Medium	Outreach	Outreach Followup
06/11/18	Low	\$24000/yr	Needs SLA Task
05/15/18	Medium	Outreach	Outreach Followup
06/11/18	Low	\$24000/yr	Needs SLA Task

Reason(s) for Follow-Up

Family's expected move-in date is the next three weeks  
 Resident needs assistance with activities of daily living  
 Family has visited MySearch or used SLF App in the last week

Communities

Name	Status	Referral
The Sheridan at Tyler Creek	Property Toured	01/10/18
Brighton Gardens of St. Charles	Scheduled Tour	01/12/18
White Oaks of Spring Street	Property Toured	01/23/18

Cancel

Save

Home

Primary Contact

Resident Name(s)

Attempted Contact

Contact Attempted in the last 3 days Exclude Reset

Jonnie Patterson	Peggy Patterson	4/09/2018
<b>Daniel Peletis</b>	<b>Nancy Petelis</b>	<b>4/08/2018</b>
Frank Coyle	Paddy Coyle	5/16/2018
Alicia Dooley	Michael Dooley	6/27/2018
Franklin Geomongie	Mary Geomongie	6/17/2017
Missy Pruitt	Luke Skywalker Pademe Amadala	8/3/2018
John Stottlemeyer	Alison Stottlemeyer	9/20/2018
Kim Baze	Fran Baze	11/14/2018
Livia Sims	Susan Sims	4/28/2018
Missy Pruitt	Mark Pruitt	6/17/2017
Kate Pugh	Aadam Pugh	4/28/2018
Chris Carey	Kate Carey Steve Carey	6/17/2017
Bail Organa	Leia Organa	6/17/2017
Nichole Neale	Mary Katherine Neale	6/17/2017
Roksana Davie	Suzanna Davie	6/17/2017
Manveer Phelps	Tushie Phelps	6/19/2017

Daniel Peletis: Lead ID: 17376542



Attempted Contact: 04/12/2018 Successful Contact: 04/18/2018 Sales Phase: Wait List Expected Move-In: September, 2018 Lead Status: Hot

Primary Contact

Name: Daniel Peletis  
 Email: dpeletis@gmail.com  
 Relationship to Resident: Son  
 Phone: (630) 372-9987 (Home), (630) 649-0064 (Work), (630) 314-6175 (Mobile)  
 Do Not Call

Key Note

Add a new note...

Resident(s)

Name: Nancy Peletis  
 Email: npeletis@comcast.net  
 Age: 85  
 Care Type(s): Assisted Living (A)  
 Location(s): Seattle, WA 98118  
 Budget: \$2,000 - \$2,499 / month  
 Likelihood to Move: 64%  
 Expected Move: January, 2019

Tasks

Due	Priority	Task	Task Details
05/05/18	High	Call Family	HOT - Book the Move
05/15/18	Medium	Outreach	Outreach Followup
06/11/18	Low	\$24000/yr	Needs SLA Task
05/15/18	Medium	Outreach	Outreach Followup
06/11/18	Low	\$24000/yr	Needs SLA Task

Reason(s) for Follow-Up

Family's expected move-in date is the next three weeks  
 Resident needs assistance with activities of daily living  
 Family has visited MySearch or used SLF App in the last week

Communities

Name	Status	Referral
The Sheridan at Tyler Creek	Property Toured	01/10/18
Brighton Gardens of St. Charles	Scheduled Tour	01/12/18
White Oaks of Spring Street	Property Toured	01/23/18

Cancel Save

**Why Skip?**

**Contacted recently**

---

**Expected Move (< 3 Months)**

---

**On-Hold**

---

**Do Not Call**

---

Cancel

Save

### Why Skip?

**Contacted recently**

**Set Follow-Up**

Phone

MM/DD/YR



**Priority**

Low  Medium  High

**Next Steps**

**Expected Move** (< 3 Months)

**On-Hold**

**Do Not Call**

Cancel

Save



### Why Skip?

Contacted recently

---

Expected Move (< 3 Months)

Set Follow-Up

Phone

MM/YR



Priority

Low  Medium  High

Next Steps

On-Hold

---

Do Not Call

---

Cancel

Save

### Why Skip?

Contacted recently

---

Expected Move (< 3 Months)

---

On-Hold

Set Follow-Up

Phone



Priority

Low

Medium

High

Next Steps

Do Not Call

---

Cancel

Save

**Why Skip?**

**Contacted recently**

**Expected Move (< 3 Months)**

**On-Hold**

**Set Follow-Up**

Phone  MM/DD/YR  

**Priority**

**Next Steps**

**Do Not Call**

Today is: March 13, 2018

**< September, 2018 >**

						1
2	3	4	5	6	7	8
9	<b>10</b>	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

### Why Skip?

Contacted recently

Expected Move (< 3 Months)

On-Hold

Do Not Call

Set Follow-Up

Email

MM/DD/YR



Priority

Low

Medium

High

Next Steps

Cancel

Save

### Add a Task

Task Type

Call Family

MM/DD/YR



Priority

Low  Medium  High

Next Steps

Completed

Talk  Voicemail  Email  Text

Download calendar entry after save

Cancel

Save

### Edit a Task

Task Type

Call Family

09/21/18



Priority

Low  Medium  High

Next Steps

Outreach call completed

Completed

Talk  Voicemail  Email  Text

Download calendar entry after save

Cancel

Save

## Customer Journeys: I'm glad I could help you and your family!



John, SLA, logs into the Power Follow-Up system and sees he has a lead on which he needs to follow-up



John calls the contact, the son, Daniel, who's looking for placement for his Mom, Nancy, and might need help with his father in the near-future.

Nancy has had a stroke recently and needs mobility care as well as rehabilitation for cognitive and speech skills.

Daniel's Dad is just getting older and needs help, especially now since his wife is now going to be living alone and his transportation options are limited.



John gives information to Dan for his parents' next-choices for placement in a community

The family communicates with the community and sets up an appointment

Updates current task: "talked to the client, looking at placement"

Creates a future tasks

Add or update keynotes/notes



# APFM Power Follow-Up Styleguide

## Font-family:

"Segoe UI", Roboto, "Helvetica Neue", Arial, sans-serif, "Apple Color Emoji", "Segoe UI Emoji", "Segoe UI Symbol";

**Headline (h1): Bold 18px #333**

**Sub-Headline (h2): Bold 14px #333**

Field Label: Bold 12px #999

**Field Bold: Bold 12px #333**

Field Indicator & Help: 11px Regular #999

Standard Text (p): Regular 11px #707070

**Alert Text: Regular 14px #**































Small text:

**Button Text: Regular 15px #ffffff**



## Margins and padding

20px

## Iconography (16px high)

- |   |                         |   |                          |
|---|-------------------------|---|--------------------------|
|    | Phone Call              |    | Notes                    |
|    | Email                   |    | Add                      |
|    | Chat                    |    | Help                     |
|    | Text                    |    | Location                 |
|    | Skip                    |    | Logout                   |
|    | Okay                    |    | Login                    |
|    | Alert                   |    | Sort (Inactive)          |
|    | Search                  |  | Sort/Dropdown (Inactive) |
|    | Radio Button (Inactive) |  | Statistics               |
|    | Radio Button (Active)   |  | Five9                    |
|  | Checkbox (Active)       |  | Delete                   |
|  | Checkbox (Inactive)     |  | Launch YGL               |
|  | Calendar                |  | Dropdown (Unactivated)   |
|  | "Hot" Lead              |  | Dropdown (Activated)     |
|  | "Warm" Lead             |   |                          |
|  | "Cold" Lead             |   |                          |



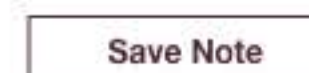



## Colors

- |   |   |
|---|---|
| Dark Grey (general text): #333333                                       |  |
| Mid-Grey (secondary text): #999999                                      |  |
| Light grey (indicator text) & depreciated buttons, header bars: #D9D9D6 |  |
| Orange (alert/important/"Hot"): #d76B00                                 |  |
| Header, Primary Button/Action: #a8ad00                                  |  |
| Active Column Header Text/Icon, #4E2639                                 |  |

## Material form field guidelines



## Interactive items

- |                      |   |   |
|----------------------|---|---|
| Save/Cancel Buttons  |  |  |
| Secondary Button     |  |   |
| Button (Depreciated) |  |   |
| Dropdown Box         |  |   |
| Small Dropdown Box   |  |   |

## Margins and padding

20px

## Nomenclature

Dropdowns  
- Any = All choices



## Qua?: Tim's Need-to-dos and Questions

How do we display dates? 01/02/2018, or January 01, 2018?

Can the Advisor delete a whole entry/resident but leave the contact?

What kinds of information would an Advisor want to export/import?

Do we want to allow inportation of information into our system from other conduits (ie., Advisors' Excel sheets)?

What do the scores mean? They seems pretty meaningless ... no context. I don't understand the gamification of this. I see I'm in 2nd place. Against what? What are those metrics? Tied to my score, mentioned above?

Right now "Help" doesn't do anything. What is it supposed to do?

Right now FAQs doesn't do anything. What is it supposed to do?

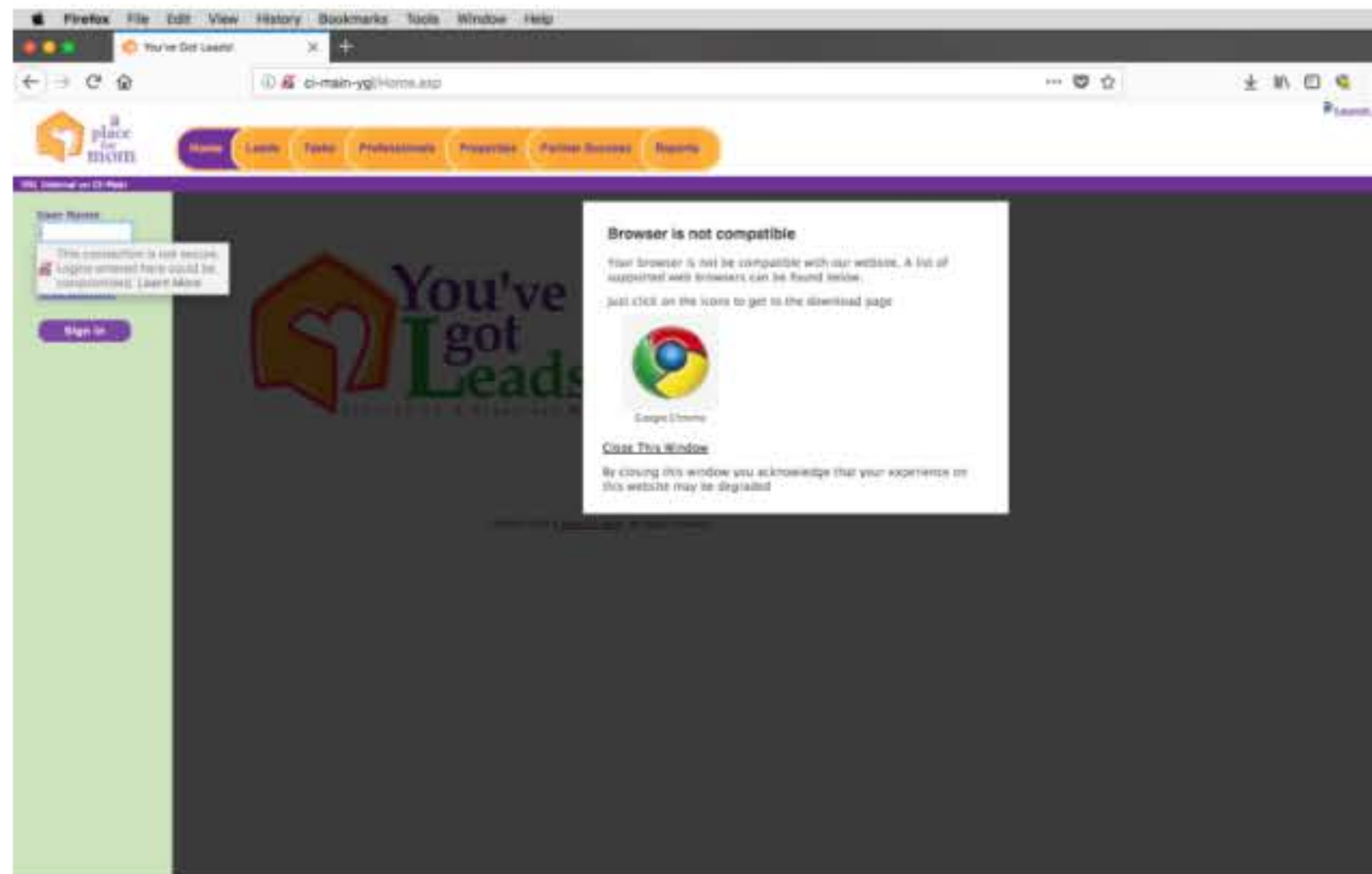
Does anyone use "Feedback"? It's pretty prominent. Maybe bring that down to the footer?

I can't log in to Five9, so have limited insight there.

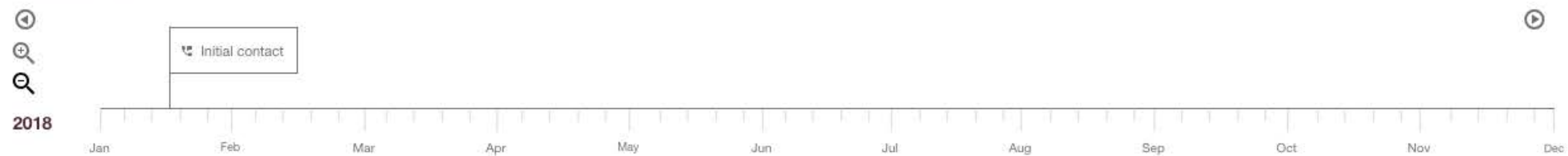
What's our design-pattern with buttons? Pri1 on the left and depreciated on the right? That's not great.

### NECESSARY?

- When a user hits the back button, they're not taken to the last state, but re-instances the app. Is that required? I should be able to hit the back button.



### Engagement Timeline



## User Personas: Son calling on-behalf of his parents



**John Mayers**

Job: **SLA, APFM**

Job: **LOCATION**

Age: **39**

Location: **Lawrence, KS**

Need: **Work with Daniel, the son of Nancy and Joe, to help get Daniel's parents into assisted living care within a reasonable distance from where the son lives, in Seattle, WA**



**Daniel Peletis**

Job: **Project Coordinator, Unknown**

Age: **42**

Location: **Seattle, WA**

Need: **Help placing his parents in assisted living. His Dad is having a hard time remembering things and his Mom needs help with mobility since she had to have hip-replacement surgery recently.**



**Nancy Peletis**

Job: **Retired**

Age: **72**

Location: **Seattle, WA**

Need: **Help with mobility and general healthcare as well as assistance with her husband who is having memory problems.**



**Joe Peletis**

Job: **Retired**

Age: **76**

Location: **Seattle, WA**

Need: **Assistance with increasing memory-loss and and helping his wife, Nancy, with her mobility issues after her last fall, a few months ago.**

