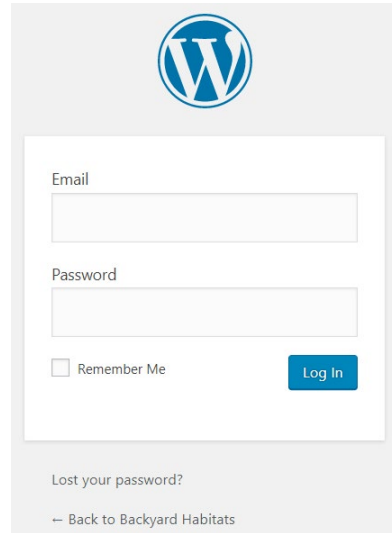


# FOLLOW UP PHONE CALLS

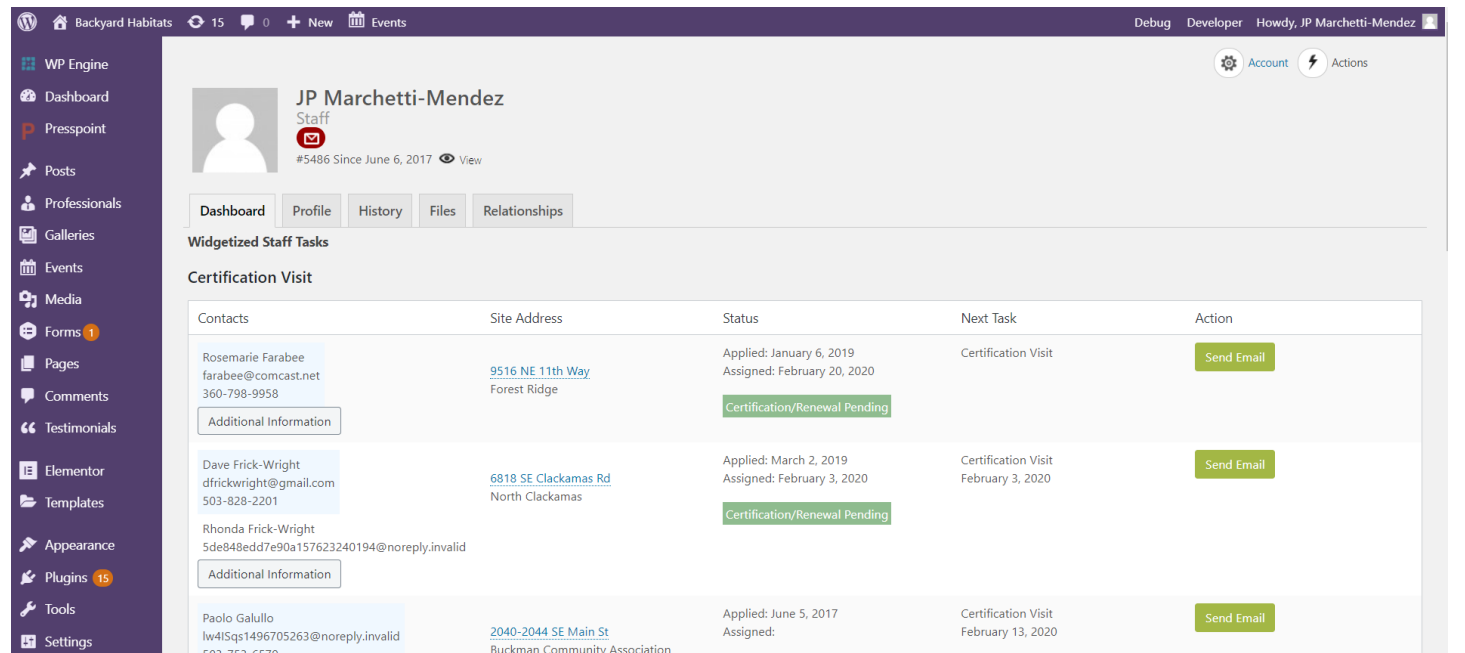
Follow up calls keep participants connected to the program and motivated to get certified. Our expectation is that each technician will dedicate six to eight hours every month to make follow-up calls to participants that they visited over 6 months before.

1. Login to Presspoint using the link, username, and password provided. This will take you to your dashboard.



The image shows a WordPress login form. At the top is the WordPress logo. Below it are two input fields: "Email" and "Password". There is a "Remember Me" checkbox and a "Log In" button. At the bottom, there is a link for "Lost your password?" and a link to "Back to Backyard Habitats".

What your dashboard will look like:



The image shows a screenshot of a WordPress dashboard. The top navigation bar includes "Backyard Habitats", "15", "New", "Events", "Debug", "Developer", and "Howdy, JP Marchetti-Mendez". The left sidebar contains various menu items: WP Engine, Dashboard, Presspoint, Posts, Professionals, Galleries, Events, Media, Forms (1), Pages, Comments, Testimonials, Elementor, Templates, Appearance, Plugins (15), Tools, and Settings. The main content area shows the user profile for "JP Marchetti-Mendez" (Staff) with a "Dashboard" tab selected. Below the profile is a "Widgetized Staff Tasks" section titled "Certification Visit". This section contains a table with the following data:

Contacts	Site Address	Status	Next Task	Action
Rosemarie Farabee farabee@comcast.net 360-798-9958 <a href="#">Additional Information</a>	<a href="#">9516 NE 11th Way</a> Forest Ridge	Applied: January 6, 2019 Assigned: February 20, 2020 <span>Certification/Renewal Pending</span>	Certification Visit	<a href="#">Send Email</a>
Dave Frick-Wright dfrickwright@gmail.com 503-828-2201 Rhonda Frick-Wright 5de848edd7e90a157623240194@noreply.invalid <a href="#">Additional Information</a>	<a href="#">6818 SE Clackamas Rd</a> North Clackamas	Applied: March 2, 2019 Assigned: February 3, 2020 <span>Certification/Renewal Pending</span>	Certification Visit February 3, 2020	<a href="#">Send Email</a>
Paolo Galullo lw4lSqs1496705263@noreply.invalid 503-753-6579	<a href="#">2040-2044 SE Main St</a> Buckman Community Association	Applied: June 5, 2017 Assigned:	Certification Visit February 13, 2020	<a href="#">Send Email</a>

You'll see a section in your dashboard called Followup Phone Call:

2. Start at the top with those accounts whose Next Task date is the oldest, and work your way down the list to the newer Next Task dates.
3. Click on the hyperlinked Site Address, which will take you to the Property Profile.

4. Click on the history tab

5. Click on the site report to open it so you can reference it during the call.

**NOTE:** The site report may be stored in the history tab of the Individual profile.

**NOTE 2:** The site report name follows the pattern (LastName)(FirstInitial)\_SiteReport\_(VisitDate)\_(TechInitials)

Contacts	Site Address	Status	Next Task	Action
Jennifer Lawson jajl2019@gmail.com 650-283-1706 (other)	<a href="#">7518 SE 29th Ave</a>	Applied: November 1, 2019 Assigned: <b>In Progress</b>	Followup Phone Call March 15, 2020	<a href="#">Send Email</a>
Emily Myers emyersmad@hotmail.com 503-820-8418 (other)	<a href="#">4520 SE Brooklyn St</a>	Applied: November 3, 2019 Assigned: <b>In Progress</b>	Followup Phone Call March 15, 2020	<a href="#">Send Email</a>

**Participant Availability**  
Monday daytimes are the best, otherwise weekends.

**Participant Interests**  
I have planted quite a few native plants and trees in my front yard over the years.

**Property**  
c995bd49619587158206033904@noreply.invalid  
#20975 Since February 18, 2020 View

**Profile** **History**

March 8, 2020 [NorrisM SiteReport 03-01-2020 CG](#)  
Type: pdf Categories:

March 1, 2020 [Initial Assessment](#)

February 18, 2020 [Manly Norris \(edit\)](#)  
Manly Norris is the **Primary Contact** for 2309 SE 51st Ave

Making the call:

6. Make the call using the contact information in the Contacts column of the dashboard or in the site report.
7. Follow the example and guidelines.

After the call, under the property profile:

8. Create a Note using the Actions button.

**If someone answers,**

*“Hello, my name is **Susie Peterson** with the Backyard Habitat Certification Program. We met when I did your initial site visit last **November**. I am calling to check-in and see how your backyard habitat is coming along.”*

- a. Be positive and encouraging!
- b. Review the five elements of the certification criteria.
- c. Refer to the Site Report, Resource Packet, and the website.
- d. Avoid referring questions back to the staff.

**If no one answers,** leave a voice message with your name and number so they can return your call.

The screenshot shows the top section of a property profile. On the left is a placeholder for a property image. To its right, the address '7518 SE 29th Ave' is displayed, followed by 'Property' and a contact email 'ad0f6a03e30bae157588527687@noreply.invalid'. Below this is the text '#14940 Since December 9, 2019' and a 'View' icon. At the bottom left of this section are 'Profile' and 'History' buttons. On the right side, there are 'Account' and 'Actions' icons. A dropdown menu is open under 'Actions', listing options: Certification, Email, Form, Initial Assessment, Note (highlighted), Private File, Rating, and Task. A red arrow points from the right towards the 'Note' option. An 'AVE' button is partially visible on the far right.

The screenshot shows the main form area of the property profile, divided into three columns. The left column contains address fields: 'Address Line One' (7518 SE 29th Ave), 'Address Line Two' (empty), 'City' (Portland), 'State' (Oregon), 'Country' (empty), and 'Postal Code' (97202). The middle column contains site and application details: 'Site Status' (In Progress), 'Application Date' (2019-11-01), 'Application fee paid?' (checked), 'The size of my yard is 1 acre or smaller' (checked), 'Property Type' (Single-Family Residential), 'Total Lot: 5000 sqft', 'Plantable: 2959 sqft', 'Naturescaped: 0.0 sqft', and 'Naturescaped: 0% %'. The right column contains relationship and task information: 'Widgetized Relationships', 'Individuals' (Jennifer Lawson, primary contact, : 5855), 'Assignment Date' (empty), 'Next Task' (Followup Phone Call), 'Task Date' (2020-03-15), and 'Next Task Assigned' (Catherine Goode).

9. On the window that opens on the top right corner, add:
  - a. “Follow Up Call Note” on the Subject field
  - b. The call date on the Date field
  - c. The call note
  - d. Select “Telephone Conversation” for the type of interaction
  - e. Click the Save button

**NOTE:** You can edit an existing note to add subsequent information by going to the History tab and clicking on the note hyperlink.

10. If the participant is not ready for a certification visit, change the Next Task to “Follow Up Email.” If they are, skip to **Note 2** below.
11. Change the Task Date field to six months ahead.
12. Remove your name from the Next Task Assigned To field (select the blank option).
13. Click the Save button.

**NOTE 2:** If the participant is ready for a certification visit:

- a. Change the Site Status to “Certification/Renewal Pending”
- b. Change the Assignment Date to the date you made the call
- c. Change the Next Task to Cert Visit
- d. Delete the Task Date
- e. Select JP’s name in the Next Task Assigned field.
- f. Click the Save button.

X CLOSE SAVE  
**Subject** Follow Up Call Note  
**Date** 2020-04-03  
**Message** Examples: "Spoke to Paul, who is still removing ivy" or "Left message."  
**Type of Interaction** Telephone Conversation

Account Actions  
 Certification  
 Email  
 Form  
 Initial Assessment  
 Note  
 Private File  
 Rating  
 Task

**Address Line One** 7518 SE 29th Ave  
**Address Line Two**  
**City** Portland  
**State** Oregon  
**Country**  
**Postal Code** 97202  
**Site Status** In Progress  
**Application Date** 2019-11-01  
 Application fee paid?  
 The size of my yard is 1 acre or smaller  
**Property Type** Single-Family Residential  
 Total Lot: 5000 sqft  
 Plantable: 2959 sqft  
 Naturescaped: 0.0 sqft  
 Naturescaped: 0% %  
**Widgetized Relationships**  
**Individuals**  
[Jennifer Lawson](#) (primary contact)  
 : 5855  
**Assignment Date**  
**Next Task** Followup Phone Call  
**Task Date** 2020-03-15  
**Next Task Assigned** Catherine Goode