**Virtual Financial Group- Easy as pie CRM**

**Contact Name**   **Email** **Phone**

**City State Time Zone**

**Notes**

**Tier level 1,2,3 or 4 or flush (choose 1)**

**Tier 1 status**

No initial contact

3x3 in progress

Contacted 25 minute sent

Follow up after video

Schedule Tier 2 call

**Tier 2 Status**

Call scheduled

Call made

Contact signed up, schedule tier 3 call

**Tier 3 status**

Call scheduled

Call completed

Fast Track

Traditional

Schedule Tier 4 call

**Tier 4 status**

Call scheduled

Call made

Policy yes

Policy no