

SCHOOLBONDFINDER BEST PRACTICES

- 1) Attend a SBF training session with our Customer Experience team, utilize the Tutorials area, and/or use the 'SchoolBondFinder Search Secrets' document to understand SBF's basic features.

- 2) Search the SBF database by casting a 'wide net' and then target down to your preferred opportunities using the Filter tool.

- 3) Create alert(s) for your preferred Filter set.
 - a. These emailed alerts will come to you on your choice of a daily, weekly, monthly, or bi-monthly frequency. You will be alerted to new items that meet your filter set as well as if any of your previously received items have substantial modifications to them (added changes = green text; removed changes = red text with a strikethrough).

 - b. Watch List & Propose status provide the earliest phase of referendum opportunities.

 - c. Filter status of Districts that had referendums fail in the last 12-18 months (using the vote date filter) for your solution. These Districts almost always circle back to Watch list. The District's needs won't disappear and failed referendums can serve as "pre-watch list".

 - d. Filter status of Districts that had referendums pass in the most immediate few months (using the vote date filter) for your solution. These Districts will likely be putting out RFPs soon if not already.

- 4) Sales managers are encouraged to include regular reviews of SBF opportunities/leads with their associates to check on status.