SALES LEAD | Keep Warm Process

Step 1: LEAD CAPTURE with Executive Assistant/Office

a. Gather lead contact information & <u>basic</u> project details
b. Gather lead source (referral, campaign? etc.)
c. Send scripted “next steps” email with:
   I. Confirmation on meeting date or who’s calling back
   II. Profile link on salesperson calling back
   III. VIDEO: “What to look for in a professional _______”
d. Enter all lead details into CRM with notifications

Step 2: PREQUALIFYING PHONE CALL

a. Background research on the client, area, etc.
b. Call lead to prequalify (see separate prequalifying steps & questions)
c. Determine advance: if so, schedule a meeting
d. Send meeting confirmation together with:
   I. VIDEO OPTION 1: “Our Process/What to Expect”, OR
   II. VIDEO OPTION 2: “Price vs. Value Testimonial”
   III. Project Planner Questionnaire

Step 3: IN-PERSON SALES MEETING

a. Meeting prep: Sample projects & iPad resource library
b. If it is the ideal client, provide them Keep Warms:
   I. Key take-home portfolio with similar project sample
   II. Budget samples & how-to’s
   III. Existing client Introduction & references
c. Email follow-up Keep Warms: (within 30 mins)
   I. Inspiration photos & scope outline
   II. Next steps confirmation

Step 4: PROPOSAL & PLANNING

a. See separate DETAILS FOR COMPREHENSIVE PROCESS & S.O.P
b. Keep Warm Tools include: (see schedule/timing S.O.P)
    a. QUICK PIC OF “US WORKING ON IT”
    b. INSPIRATION IDEAS: Gallery, project or blog they haven’t thought about
    c. VIDEO OPTION 3
    d. VIDEO OPTION 4
    e. BUDGET UPDATE
    f. US WORKING ON IT: update, vids, sketches, “wow-factor”
    g. Benefits Article/Post
    h. IN-PERSON PROJECT TOUR
    i. CROSS SELL INSPIRATION
c. Presentation & in-person project tour
d. Video on construction/implementation
e. Get advance
f. Details
g. Close the sale
h. Hand-off with detail wrap-up
i. Scheduling & next steps