	1. Turning Leads into Customers	
1.1	**Understand the lead**	Read the information in the lead (Company, contact name, email, website, search terms, identified products etc) and quickly look up the lead online to get familiar with them. Look for other companies from the same town and whether we've sold to the same organisation in another territory
1.2	**Enter the lead**	Check for duplicates and forward to the appropriate colleague if a duplicate is found, otherwise enter the lead accurately and fully into Netsuite
1.3	**Call the lead**	Within 45 minutes call the lead to open the sales cycle
1.4	**Email the lead**	Within 45 minutes email the lead to maintain momentum after the initial call or as a first point of contact if you haven't been able to reach them successfully
1.5	**Offer samples**	Confirm which samples the lead is interested in receiving, confirm their address - never just send samples to an address that you've found online without confirming with the lead first
1.6	**Get their logo so you can have a Virtual Proof made**	Ask for it as the "Call to Action" in your initial email and on the initial call. If the lead doesn't provide to you after you've asked then look it up online and send a Virtual Proof of their preferred model or an intelligent suggestion if they don't have a preference
1.7	**Provide a Quote**	Once you know what the lead wants and have their logo you can provide a quote. If the lead isn't responsive to your calls or emails then quote based on the info you already know from the enquiry to give you a baseline starting point. If you don't have enough info then intelligently quote for the most popular model, quantity and capacity
1.8	**Be responsive**	Answer all questions and reply to all emails from the lead within 45 minutes - it shows you want their business. Return all phone calls within 45 minutes
1.9	**Be proactive**	If a lead doesn't respond to your follow-ups decide whether to offer a better price, if they give you a competitor quote get approval to match on the Price Check channel
1.10	**Make it easy for the lead**	Always attach the most recent quote to all emails during the pre-sales cycle - this makes it easy for the lead to know what you're offering them
1.11	**Manage the sales cycle**	Always include a "Call to Action" at the end of calls and in the last paragraph of emails to progress to the next stage of the sales cycle
1.12	**Be persistent and follow-up**	Follow-up with appropriate frequency - for responsive leads this will be an active conversation, for unresponsive leads you should set a follow-up date in the pipeline and follow the Automatic Follow-up reminder email notifications
1.13	**Be aware of deadlines**	If the lead has specified a deadline your follow-up needs to be more frequent and remind the lead of their important deadline and our lead times
1.14	**Always send a comprehensive Order Comfirmation**	Have the lead confirm all aspects of the order so both sides know what's being agreed. There is a handy template in Text Parts that you should use to ensure nothing is missed
1.15	**Follow-up payment and data**	Always be aware of any deadlines and make sure you follow-up as often as necessary to ensure they will be met
	2. Enquiries from Existing Customers	
2.1	**Understand the enquiry**	Read the information in the enquiry or email from the existing customer and refresh your memory about the customers past orders and price levels
2.2	**Ensure you make the customer aware they have ordered from us before**	If dealing with a contact you have dealt with personally before you can assume they remember us, if it's a new or unfamiliar contact make reference to past orders from the company when you make make initial contact. Make sure the new contact is added to Netsuite.
	Then proceed from step 1.3 above - just replace "lead" with "customer" in your mind when reading	

v.20181206

	3. After an order has been placed	
3.1	**Follow-up payment and data**	Always be aware of customer deadline and make sure you follow-up as often as necessary to ensure it will be met by securing any advance payments or provision of data in time
3.2	**Keep the customer informed**	If the customer order is subject to capacity upgrades, changes or delays of any sort then keep the customer updated the same day that you find out
3.3	**Confirm customer satisfaction**	Within 2-3 working days of order delivery call your customer to ensure everything about the order and order process was 100% to their satisfaction and raise an Aftersales case if not - we want all our customers to be 100% happy in their dealings with us
3.4	**Earn a TrustPilot bonus**	If the customer confirms they are 100% happy then send them a TrustPilot invite
3.5	**Chase overdue payments**	Secure your commission by chasing all payments that become overdue
	4. Aftersales process	
4.1	**Customer not 100% happy = open an aftersales case**	Follow the Aftersales process for all customers who indicate that they are not 100% happy with any element of Flashbay's products or the service we've provided to them
	5. Respecting privacy	
5.1	**Check contact preferences before follow-ups**	Check Netsuite to ensure that the contact is happy to be contacted - they will have a green tick if they are
5.2	**Unsubscibe contacts from marketing if they ask**	Respect contact email marketing preferences by unticking "Email marketing subscribed" on the contact record in Netsuite if they say they don't want to receive email marketing
5.3	**Mark contacts as "no follow-up" if they ask not be to contacted at all**	Respect contact communication preferences by ticking "No follow-up" on the contact record in Netsuite if the contact says they don't want to be contacted at all
	6. Keep your records tidy and updated	
6.1	**Manage contact information**	Enter all new contacts into Netsuite, update the details of existing contacts, correct any mistakes that you become aware of an mark contacts who leave an organisation as inactive
6.2	**Manage your inbox**	Use the A-Z folder system to organise your inbox, manage your storage use by using the filters provided
	7. Engage and learn	
7.1	**Be active**	Demonstrate that you are active by exceeding the MDAR but be smart and make every interaction valuable and meaningful
7.2	**Engage with your account**	Keep in touch with your existing customers at least once every 180 days, treat re-energised leads as a new opportunity to gain a Customer
7.3	**Be hungry**	Every sales person has an abundance of opportunities for conversions and sales to existing customers - always challenge yourself to maximise your performance and stay hungry for more
7.4	**Learn**	Check the wiki and Slack for updates, refresh your product knowledge, analyse your own performance and approach, learn from feedback, seek out ways to improve
7.5	**Have integrity**	Be honest with your customers and your colleagues, don't cheat or game any systems
7.6	**Be available**	Answer all incoming calls within 3 rings and transfer calls to colleagues / take messages in a polite and professional way