Fast Start Highrise, the Local Search Force Memory

Highrise is the Local Search Force CRM. CRM stands for **C**ustomer **R**elationship **M**anagement. A CRM is a computerized program that helps manage our business relationships with current and prospective customers. Highrise acts as the memory for Expansion Support Services, including prospects, clients, appointments, notes about the clients, etc., so keeping it updated and current is vital to Local Search Force's success.

Make up a fictious business and do each of the below actions below:

Entering or correcting a business…

a. Using the search bar, determine if the business or person is already in Highrise. If not, continue.

b. Click on Add Contact. Note: When creating a Spotlight Story on CAB, the contact will add automatically.

c. Click on "Add a new company". We add all company information under the company, not a person. Do not click on Add Contact and start entering information as the Add Contact opens up into adding a person.

d. Complete as many fields as possible.

e. Under "Background Info"… first, list the business owner's name and the person you are working with if different, and any other rapport or important info. For example, "Don't call before 9:00 am", "goes by 'Bud' "

f. At the very bottom of the form under "Who Else Can See this business/person", ALWAYS click on "Everyone in my account", except when adding payment information in which case you will only permit Treasury Manager, Mimi Kintzel and Kurtis Kintzel to view the note.

g. Click on Add Person(s) and enter the owner's name, cell and email address, then "Add this person". Add people within the company you or others will be dealing with.

h. To update or make changes to the business profile, find the business in HR and click on Edit Company found on the top right. Make additions and changes to the test company and save it. Companies and the information about the Company in HR should ALWAYS be current and correct.

For examples…

1. If you do a sales presentation, you'll edit the profile after your appointment to show a presentation was done and the customer status is changed from "Contacted" to "New Customer".
2. Perhaps you call a prospect and get their voicemail. You'll add a note in HR that you called and got voicemail.
3. The client sends you an email. You'll copy and past the email into HR.
4. Your client does an online order with us and you get the copy emailed to you. You'll copy the order form and post it into HR.

Entering a Note, Appointments, Task, and Deals

a. **Notes:** When you locate a business's profile, there will be a black rectangle box in it's Latest Activity. This is where ALL notes are entered. Add notes giving background data, memory joggers, links to Spotlight story, appointment dates and time, each time a call is made out even when just leaving a vm, etc. If you want someone to read the note you are entering, click on Show Options and towards the bottom there will be a list of staff members under a heading "Email this Note". Check the person to receive your note.

b. **Tasks and Appointments:**
    a. On the right side of your screen, click on Add a Task.
    b. In the top space, name the task, for example, "(**Company Name) Spotlight Appt**"
    c. Select the date and time. Note: The data entry screen does not always input the correct date/time
    d. Assign the task to the correct person.
    f. ALWAYS click on the "Let everyone see this task".

c. **Deals** – Add a Deal when a prospect gives you "buy signs", whether or not they have paid yet.
    a. Click on "Deals", then "Add a New Deal"
    b. Name the deal by listing the "**Company Name"** and then "Category" (XYZ Company-CMA);
    c. Under Category, select the correct category.
    d. Under Who is Responsible, add your name or the correct person that is accountable;
    e. Click "Add the Deal"

AFTER THE APPOINTMENT
    a. **Add a note…** After all scheduled appointments, the salesperson will immediately add a note in the Latest Activity Notes saying one of 3 things: "Presentation Done – Sale", "Presentation Done – No Sale (and the barrier or consideration)" or "No Presentation – (why no presentation)". A presentation is considered done if the salesperson shared the Spotlight Story with the prospect in person or using a screen share, had rapport, discussed the client's business problems that can be resolved through a Company service and offered our service including pricing as a solution.

    b. **Edit the company's profile** by finding the "Edit this Company". Change the "Presentation?" to what occurred. Select the drop down for the weekending the Presentation occurred and add the presentation weekending date which will be the upcoming Friday in numerical for. For example, Friday October 27, 2023 will be listed as 231027. Input the client's problem they originated, number of staff, etc. Go through and add any other data in the available tabs that you know about.

    c. **Check or Change the Task…** If the prospect and salesperson do the appointment, check the box on the task signifying you completed the task. If the appointment does not occur, change the date to the new scheduled appointment or "Later" if there is no date set.

      If the appointment occurs and there is a follow up needed or the client is interested in a service, check off the task for the initial appointment showing it was done, then create a new task for the new action.