SALES DIRECTIVE - CONFIDENTIAL

Highrise = Company Memory

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Staff Member   Date Started

Do the following 5 Drills in the established sequence. After each action is done with complete comprehension, check it off by initialing.

Highrise is **C**ustomer **R**elationship **M**anagement (CRM) software we utilize. It stores our customer base online and permits staff members to easily share data and organize their workflow. 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 our success.

Log in… localsearchforce.highrisehq.com, enter your email address & your password.

___ 1. **DRILL:** Follow the instructions for, "**ENTERING, UPDATING OR CORRECTING A BUSINESS…**" Enter a Business called "Test – (your name)" and complete each below lettered action.

___ 2. **DRILL:** Follow the instruction below for, **"ENTERING AN APPOINTMENT"** Enter an artificial and complete each below lettered actions.

___ 3. **DRILL**: Follow the instructions below for, "**AFTER AN APPOINTMENT… DO THE FOLLOWING** ". Do all below lettered actions.

___ 4. **DRILL**: Follow the instructions below for, "**PIPELINES**". Do all lettered actions.

___ **5. DRILL:** Follow the instructions below for, "**ADDITIONS AND CORRECTIONS".** Do all lettered actions.

ENTERING, UPDATING, AND 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

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, including name of business, phone, email, website, address, adding your name as the salesperson, company status, etc. Every field that you know the data, please add.

When status changes, please ensure custom fields 01-07 are updated so they are accurate.

e. Under "Background Info"… first, list the business owner's name and the person you are working with if different, and any other very pertinent information about this business that anyone speaking to them should know. For example, "Don't call before 9:00 am" or "goes by Nickname '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 the 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 now or in the future people within the comp any you or others will be dealing with. If the person is not added, you/we cannot search Highrise by the person's name as they will not come up.

h. Now that that the business and person(s) is entered, add a note under Latest Activity communicating any information about a potential appointment or lead. These notes will be create a running record for the client but also appear in you latest activity which lets management know who you are working on.

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". Be sure and check who you want to receive your communication. If its important, check their name and also create a task for them to read the note.

I. 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.

Highrise is our company-wide memory bank. It is designed so that a person can review a company profile and know exactly what is going on without having to ask any questions to the people who have been working on the account. Please do your part to keep our database useful by keeping it accurate.

ENTERING APPOINTMENTS

a. **NOTE:** Add a note in Latest Activity of the Company that an appointment has been set, adding the date, time, time zone of the appointment, and any other vital information. If it is a Spotlight Appointment, add a link to the story by copy and pasting the story's URL into the note.

b. **PROFILE:** Ensure the business profile has you listed as the person who procured the lead, the correct sales person is listed, the Company Status is changed to "Contacted and Appointment Set", and there is a note in HR showing the date/time/time zone of the appointment and a link to the spotlight story.

c. **TASK:**

a. On the right side of your screen, click on Add a Task.
b. In the top space, name the task "**Company Name – Appointment**"
c. Select the date and time. If a data entry screen from another platform, like the County Advisory Board, generates a task for the appointment, ensure the data is correct.
d. If you are setting an appointment for another, assign the task to the correct person.
e. If it is a Spotlight Story Appointment, select Category "**D6a Spotlights Interviews & Appts**". Other categories are used for other events.
f. ALWAYS click on the "Let everyone see this task".

d. **DEAL – SALES… Add this when creating the appointment is ideally to close a sale for $$.**

a. Click on "Deals", then "Add a New Deal"
b. Name the deal by listing the "**Company Name"** and then its service("XYZ Co - Website Design");
c. Add the amount that has been offered to the prospect and the duration (fixed bid, monthly, etc.)
d. Under Category, select the appropriate service;
e. Under Who is Responsible, add your name or the person's name that will be closing;
f. Click "Add the Deal"

f. **EDIT PROFILE… In the custom fields on the right, make the following changes:**

a. Field 01., change to "Contacted & Set Appointment" or whatever applies.
b. Field 03, add the weekending date the appointment is set for. This will be a six digit number using the year, month and weekending Friday . For example, 240920.

COMPLETING AN APPOINTMENT… DO THE FOLLOWING

a. **Add Task…** If there is follow-up to do upon completion of one task, create a new task.

b. **Add a note…** Once the salesperson attempts to makes contact with the prospect, they are to add notes into Highrise based on what occurred. If the client did not answer or you leave a message, add a note saying "No Answer – left VM" or simply describe what occurred.

c. **Spotlight Results?…** If the salesperson is in contact with the prospect, the very first thing added in the Latest Activity Notes is "Presentation Done – Sale", "Presentation Done – No Sale" or "No Presentation – (why no presentation)". Some staff will write paragraphs about the appointment which will help them later but slows down sales management when wanting to quickly see if we presented or not. After you list if it was a presentation or no presentation, add whatever notes you need for yourself that will help you in the future recall this sales cycle. Never add notes to anywhere in HR except under a business and in the Latest Activity.

   A presentation is considered done and should be checked off as done if the salesperson shared the Spotlight Story with the prospect and emailed a link to the story to the client.

   If the client is agreeable to and does participate in the Spotlight Edit and is engaged while we introduce our company and services, a presentation has occurred. Its considered a presentation done because its up to the salesperson to develop rapport and move the cycle forward including helping the client find the money to buy our services.

   There is no presentation if they do not participate in the edit or are not willing to be introduced to our company, are not qualified because they are not accepting new customers (closing down) or not qualified because they are not in an industry we services.

d. **Update 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.

Ensure the custom fields on the right, minimally Fields 01, 02 and 04, are up to date.

e. **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 based on when you reschedule the appointment for. If you do not speak to the prospect, for example they did not come to work so no appointment, change the task due date to "Later".

   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.

f. **Deals Won, Pending Lost:** If the appointment occurs with a qualified prospect, the salesperson is to click on "Deals" tab under the notes input box, click on the Spotlight Deal, then Edit the Spotlight Deal changing it to "Won", regardless if a sale was made or not. If the salesperson does not mark it Won but the appointment setter sees in the notes a presentation has occurred, they can do this edit themselves. If the appointment does not go down because the client was unwilling to engage in the spotlight edit, the Deal is marked lost. The Spotlight Deal signifies whether or not a presentation occurred, not if the client ordered a service.

g. **New Deals…** If the prospect is considering ordering a service, create a new Deal for that service. If the client orders the new service, create a new Deal for that service, if not already done so, and mark it

NQ "Not Qualified" is to be used only if A) the prospect does not want to make more money, is not accepting new customers, does not want to expand, and does not want help with online marketing, B) the prospect is not within the approved list of business categories, or C) the prospect does not engage (will not do a screen share, has not interest in the Spotlight Story, etc.), refuses to participate in the Spotlight Edit process or refuses to give the sales person a few minutes to enlighten them on our company(ies).

Notice that “**no money**” is not a disqualifier. People often spit this objection out robotically, but prospects always find money when they really want to make a purchase.

PIPELINES

Adding Contacts, Tasks and Deals and then sub-categorizing the deals by product and by pending, won or lost organizes a Business Consultant’s prospects and income flows.

EVERYTIME the client is giving you buying signals for any of our services, a Deal is to be created in Highrise whether you get the payment now or you intend to close the prospect later. This may be for a CMA, a website design or an internet marketing package. You will be able to run lists of “Deals” by their category and this is especially helpful when you are determining who to call. It takes about 30 seconds but will save you far more time later on.

Practice…

a. Locate your Test Company and Click on the tab that says “Deals”.
b. Click on Add a New Deal and add deals categorized as CMA, Get Found and Internet Marketing.
c. Edit the CMA Deal as Won, the Get Found as Pending (leave as is) and the Internet Marketing as Lost.
d. On the far left column in HR, click on Deals.
e. At the top of the page, click on “Everyone” and change to “Me”. Notice the deals that now come up.
f. At the top of the page, click on “All Deals Created” and change to “Pending Deals”, then “Deals We Lost” and “Deals We Won” noticing which deals comes up.
g. Now change the top to Pending Deals, Everyone, and Get Found Services. Notice the deals that come up and that some have our sales reps name and some have no name. Those with no name are open to any IMC.
h. Do the same exercise as in G but for “Deals We Lost” category Get Found. Just because a client said no to some IMC at some point does not mean another IMC with a different approach at a different time would not be able to close the prospect. All Deals We Lost are Open Deals and can be called by any IMC unless another IMC has been in contact with the prospective customer within the past 60 days.

Make a List

If you want to close and you don't know who to call even after reviewing the deals, make a list.

a. In the left column, click on "Contacts".
b. At the top, click on link "Showing all people and companies" and in the drop down click on Companies only.
c. Click on Filters, scroll down and add your name to 3. Sales Representative and click enter.
d. Realize there are many different filters you can add to make the list you want, such as, entering a state, business category, etc.

ADDITIONS AND CORRECTIONS

As communication with prospects advances, we often learn more information about the prospect or client. Add to or correct the Prospect's profile and/or add notes.

For example, we may not have the client's address or cell phone when we first enter the client or perhaps we learn that his favorite thing in life is his pet dog "Bubble Gum". Whenever you get more detailed information about the Contact (email address, 2^{nd} website, etc.) or some data that you want to be aware of immediately, Edit the Business profile in Highrise and add or correct the information.

a. Locate your Test Company and Click on the Edit Company's phone number, add a 2^{nd} email address, and ensure there is an address listed.
b. Change the Customer Status to "Basic Services – CMA" which means the client bought a CMA.
c. Put your name in #3 Sales Representative.
d. Add a website address into the bottom box that says "Old Website"
e. Add into background information "Client loves his Golden Retriever named Bubble Gum".

Keep this Checksheet and refer to it as needed.