SALES DIRECTIVE - CONFIDENTIAL

Highrise Instant Hat

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Staff Member Date Started

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. This is to be done in under 30 minutes. There is a more in-depth Highrise training later.

___ 1. **DRILL:** Add a fictious Company, appointment, and a Spotlight appointment to Highrise.
___ 2. **DRILL:** Create a fictious Appointment, the presentation was made, & the client wants to order the CMA tomorrow at 3:00. Do all Completing an Appointment actions.
___ **3. DRILL:** Set a task for Mimi Kintzel for one week out to remove the fictious business.

NEW CONTACT…

a. Using the search bar, determine if the business or person is already in Highrise. If not, click on Add Contact, then "Add a new company". Complete as many fields as possible.

ENTERING APPOINTMENTS

a**. ADD A NOTE:** List the day, date, time and client's time zone of the appointment, anything else the salesperson should know and a link to the Spotlight story.

b. **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 using eastern time zone.
- 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".

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

- a. Field 01., change to "Contacted & Set Appointment"

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. **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)". 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.

   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.

b. **Check Box or Change the "When Should It Be Done" 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 "When Should it Be Done" date based on when you reschedule the appointment for or 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".

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

d. **Edit Profile…** In the custom fields on the right, update Fields 01, 02 and 4.