



# EXPANSION DIRECTIVE

## Expansion Support Services

October 15, 2023

### *Key Words List - Sales*

#### **What is a Qualified Prospect (QP)?**

The owner and financial decision maker of a business that is listed on our Targeted Business List who wants to expand, will fully participate in a briefing, and is engaged getting his/her businesses expanding.

#### **What is an Appointment?**

A pre-set meeting between a Qualified Prospect and Consultant whereas the QP is willing to be present and engage in an in-person or a tele-conference (phone call with screen sharing) briefing on our company, our services, and how we help businesses expand. This appointment may or may not include the delivery of a free service.

*If the prospect asks “You aren’t going to try and sell me something?”, the answer is “Of course we are hoping to turn you into a customer if we can help you expand.”*

#### **What is a Presentation?**

A verbal meeting that occurs between a QP and Consultant whereas the QP communicates about their business goals and current situations, originates a problem that can be solved through marketing, listens to and fully understands the solution to resolve the stated problem, and makes a decision.

#### **What is a Proposal?**

A written offer for services that describes features, costs and terms. When prospects/customers are presented with an ESS Order Form, they are receiving our proposal. The offer should address a business problem the client wants to resolve.

#### **What is a Deal?**

A pending deal occurs when a service is presented and the QP is interested and considering purchasing the service. A won deal occurs when the QP orders a service and pays for it. A Deal



lost is a pending deal whereas the QP elects to not order the service or the pending deal becomes stale.

### **What is an Introductory Service?**

Introductory services are those offerings that provide a benefit to the client while also providing a forum for the new client to experience our company without paying any money. The Spotlight Story, Ranking Reports, Free Consultation, etc. are examples.

### **What is a Basic Service?**

Basic services are those offerings that provide a benefit to the client while also providing a forum for the new client to experience our company by paying money but without making a large financial commitment. The Competitive Marketing Analysis (CMA) and Strategic Business Analysis (SBA) are two examples.

### **What is a Development Service**

A Development Service is a service delivered based on the time it takes to complete. An example would be a website designed or redesigned by our Creative Arts Department.

### **What is an Active Customer?**

An Active Customer is a client that fully completes an online or physical order form ordering a service that has a weekly or monthly service fee. An Active Customer fully understands what they purchased, understands and agrees to all terms of the service ordered, and only promised benefits listed in Company's promotional materials and Directives. An example would be our Get Found service, in which we get a client showing up in only searches.