SALES DIRECTIVE - CONFIDENTIAL
Highrise CRM = Company Memory

Keep this Training Checksheet and continually refer to it.

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

____ ____________________________

Staff Member Date Started

1. ____ Read Description

DESCRIPTION: Highrise is a **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.

2. ____ Read Directive “CRM (Highrise) Tasks”

EXECUTIVE DIRECTIVE

November 9, 2025

"CRM (Highrise) Tasks"

Highrise, our CRM, organizes actionable workflow by tasks. Tasks are something to "do". They are created when a company is open in Highrise, which creates a hyperlink back to the company. Each task is assigned to a specific person with a due date and time to complete.

If a staff member assigns a task to another, they should always add their name at the end of the task description.

Each task is assigned a "category". Creating and/or approving task categories is the responsibility of the President. Staff may request a new categories, but not create one.

The below categories text are or should be self explanatory. If you do not know what something means, please get with your trainer.

Before the Task Category text, there will be a letter and number or a letter, number, dash and another number. ESS is Divided into Dvisions:

- Divison 1 - Human Resources
- Division 2 - Quality Control
- Divison 3 - Treasury
- Divison 4 - Delivery
- Division 5 - Customer Service
- Division 6A - Lead Generation
- Division 6B - Inside Sales
- Division 6C - Remote Sales
- Division 7 - Executive

Each Division is sub-divided into Departments. For example, Division 4 has a Department 10 Tech Support, Department 11 Creative Arts and Department 12 Internet Marketing.

So a task in category D4 – 11, indicates it's a task for Divison 4 (Delivery), Department 11 (Creative Arts).

D1 - Human Resources	Edit category
D1 - Recruiting	Edit category
D1 - Staff Not Working	Edit category
D2 - Corrections	Edit category
D2 - Training	Edit category
D3 - Payroll, Treasury, Billings, Collections	Edit category
D4 - 10 On Boarding, Domains, Online Listings	Edit category
D4 - 10 Departures	Edit category
D4 - 10 Tech Support, Email Support	Edit category
D4 - 11 Website Designs	Edit category
D4 - 11 Website Updates or Changes	Edit category
D4 - 12 Advertising Campaigns Mgmt	Edit category
D4 - 12 Local Search & Rankings	Edit category
D4 - 12 Marketing Reports	Edit category
D4 - CODE RED - Website or Email Not Functioning	Edit category
D4 - VIP or Advanced Service Delivery	Edit category
D5 - 1st Introduction Call	Edit category
D5 - Actives Enlightenment & Closes	Edit category
D5 - Customer Service, Payments Sort Out	Edit category
D5 - Salvages, Bad Indicators Handlings	Edit category
D6 - Do Spotlight Presentation	Edit category
D6 - CLOSE HOT DEAL - NEXT 5 DAYS	Edit category
D6 - Close or Complete Active Within 30 Days	Edit category
D6 - Close or Complete CMA Sale within 30 Days	Edit category
D6 - Deliver CMA or SBA	Edit category
D6 - Produce CMA or SBA	Edit category
D6 - Sales Actions, Follow-up	Edit category
D6 - Schedule or Re-Schedule Appointment	Edit category
D7 - Corp Affairs	Edit category
D7 - ESS Sales Pilots	Edit category
D7 - Pilot Companies	Edit category

Note: The above is subject to change. The real time tasks can be found in Highrise.

Kurtis Kintzel

ENTERING, UPDATING, AND CORRECTING a BUSINESS…

There are **two ways** to enter a business into Highrise. Mostly used by Appointment Setters is to enter a form at https://countyadvisoryboard.com/spotlight-input/ which will electronically create a Contact in Highrise.

The **second** is to enter the contact directly into Highrise.

The Contact information on the far right is referred to as the Contact's Profile. Their profile should continually be updated.

___ 3. **DRILL:** Go to https://countyadvisoryboard.com/spotlight-input/ and enter a test company with the business name called your last name and the word Test, for example "Smith – Test". Complete the form making up date. This story will get emailed to you and the client will be added to Highrise. After a few minutes, go to Highrise and locate your test company.

___ 4. **DRILL**: Find your Test Company in Highrise by doing a search in the HR search bar. In the top right hand corner, find the "Edit this Company" and click on this. Change #14.1 "Country the Appointment Setter is from?" and correct this data. Then Save it, look to the right and see the data is now added correctly.

To enter a company directly, follow these directions:

a. Using the search bar at the top of Highrise, determine if the business or person is already in Highrise. If not, continue. If the Contact is in Highrise, update the current contact without creating a nee one.

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 not the company.

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 including who set the appointment, weekending dates, etc.

e. Under "Background Info"… first, list any important information about this business that anyone speaking to them should immediately know. For example, "Don't call before 9:00 am" or "goes by Nickname 'Bud' "

Note: Whenever a production weekending (W/E) date is asked for, it will always be the Friday of the production week. The date is entered listing the year, month and the day of the month. For example, production weekending September 12th will be listed 250912.

f. While at the Company in Highrise, look under the rectangle box next to Latest Activity and click on "People". Then click on Add the first Person(s). Enter the owner's name, cell and email address, then "Add this person". Add additional people you know that are associated with this Company by adding more people. If the person is not added here, you/we cannot search Highrise by the person's name as they will not come up.

When a Company status changes, please edit the Company to ensure the data is accurate.

g. 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.

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…

a. If you do a sales presentation and sell a service, 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".

b. Perhaps you call a prospect and get their voicemail. You'll add a note in HR that you called the prospect and got voicemail.

c. The client sends you an email. You'll copy and past the email into a Highrise note.

d. 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.

___ 5. **DRILL**: Enter a Business called "Test – (your last name2)", complete all tabs that you know the data for, make the Contact visible to your company code, and then add two people.

Ensure after you click on Add Contact that you immediately click on the hyperlink Add a New Company.

___ 6. **DRILL**: Add a second email address to the Company. Click on Edit the Company, then click on "Add Another" under email.

Be aware that every time the Company status changes or is not up to date, it is your job to Edit the company and make the addition or correction.

ENTERING NOTES

Highrise tracks all activity on prospect and clients and makes it available to others working on the account can quickly know what has occurred.

There is a rectangle box to type the data into and a “Show Options” tab that will allow you to add attachments, email a fellow staff member the note, and determine who can see the note.

Every action gets a note, whether you speak to the client or not. If the client emails you, copy the email and add it to Highrise.

Under “Who else can See this note?”, nearly always you will leave the preset “Everyone in this account”. The exception is that when you add the client’s payment information, you’ll then click the group name “Treasury”.

___ 7. **DRILL**: Add a test Note “I called client and got Voicemail” in the rectangle box under the Company, not the person. See that it shows up in Latest Activity under the Company.

___ 8. **DRILL**: Add a test Note “Client called wants the attached image added to their website”. Attach any image from your computer. Under “Email this Note”, click on the check box for “Web Design”.

___ 9. **DRILL**: Add the test Note “Client provide their credit card information: Visa 4111-1111-1111-1111 Exp 3/2028 code 416 Billing Name Joe Smith Billing Address 123 Main Street, Chicago, Illinois 60611”. Under Who Else Can See this Note, scroll down and click on the group “Treasury”

___ 10. **DRILL**: Edit the test note with the credit card information. The Highrise Edit takes some time to open up. Click on the pencil in the bottom right corner, now click a second time on the pencil and wait for it to open. Change the credit card number and hit save.

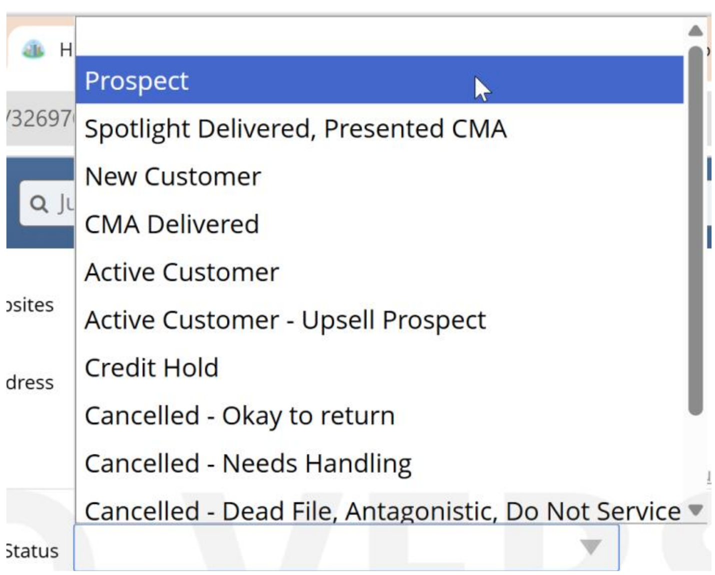
ENTERING APPOINTMENTS, TASKS

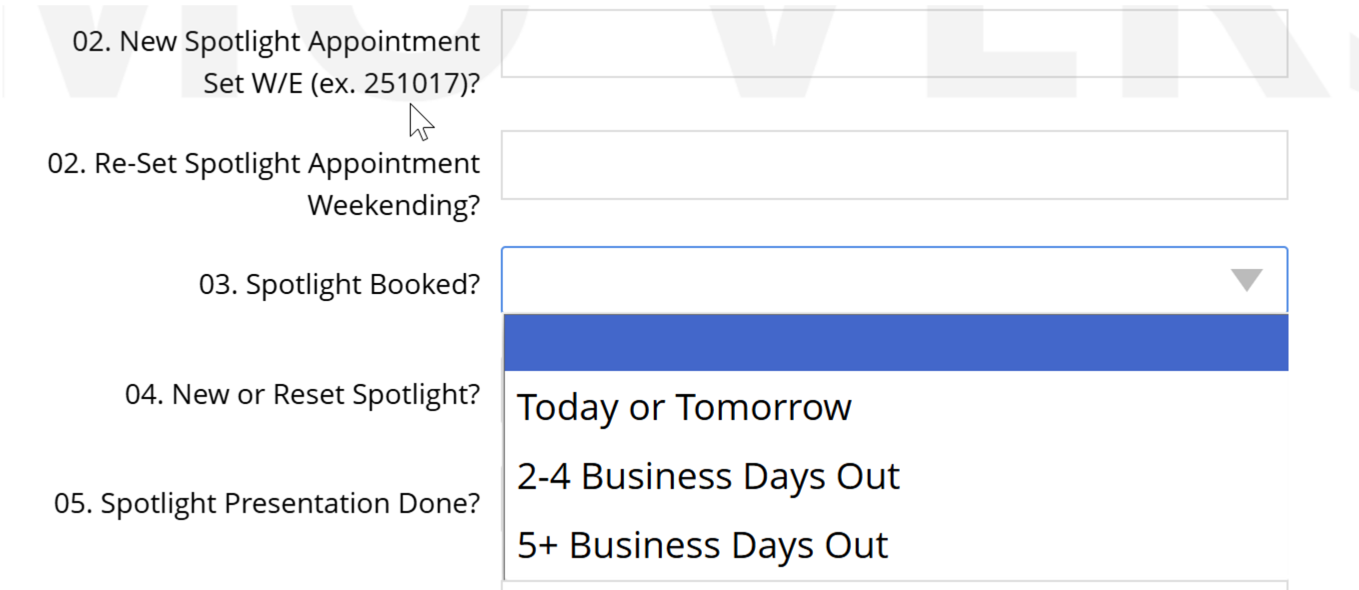
When you set an appointment with a prospect, do the following:

a. **Add the Contact** either through the County Advisory Board data entry screen if this is a Spotlight Story Appointment or add the Contact directly into Highrise.

b. **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 hyperlink to the story by copy and pasting the story's URL into the note.

c. **Contact Profile:** Ensure the business profile is up to date with all information you know, such as, it has you listed as the person who procured the lead, the Company Status is changed to "Prospect", the weekending date is listed for the Friday in the production week. Complete all fields you know the data, leave the rest blank.





d. ADD A TASK:

Note: If adding the appointment through the County Advisory Board, a Task may exist. Edit this task to ensure the data is correct. If two tasks show up instead of one, delete the second task.

If no task exists or you need to edit the task, do the following that apply:

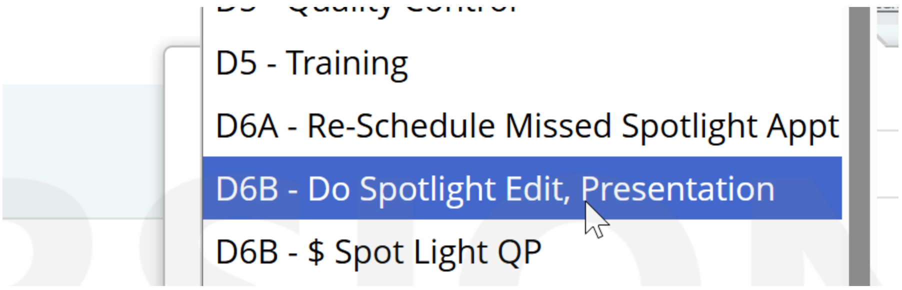
a. On the right side of your screen, click on Add a Task.

b. In the top space, name the task "**Company's Name – Spotlight Appointment**" for example, "Joe's Towing – Spotlight 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. Use the Eastern Standard Time Zone (Florida) for the appointment time. For example, if you set an appointment with a client in California for 11:00 am California time, add the task as 2:00 (Florida time). All tasks are set based on Florida time.

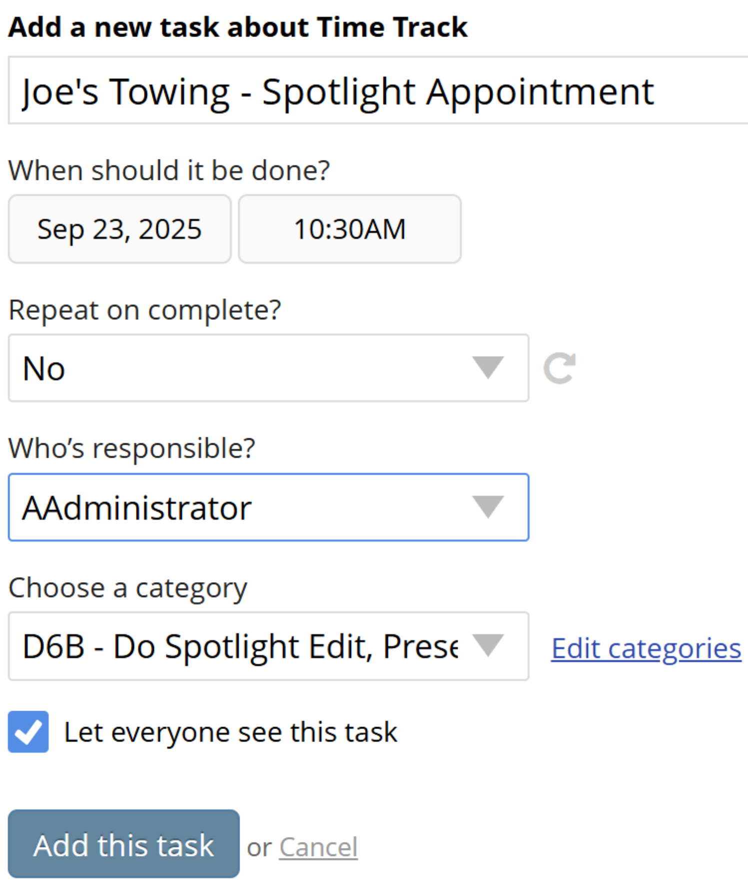
d. If you are setting an appointment for another person, assign the task to them.

e. If it is a Spotlight Story Appointment, select Category “**D6b Spotlight Edit, Presentation**”. Other categories are used for other events.



f. ALWAYS click on the “Let everyone see this task”.

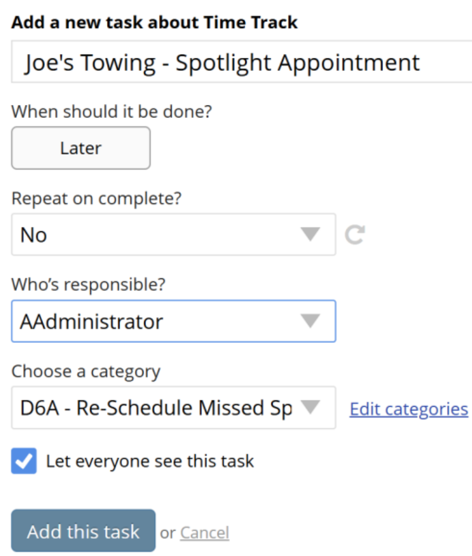
Appointments are meetings with a ESS staff member and a prospect or customer. There is an agreed upon time between 8:00am and 7:00pm Monday-Saturday.

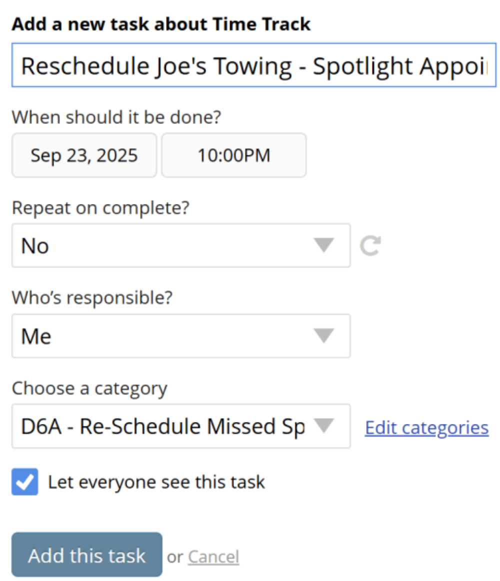


MISSED SPOTLIGHT APPOINTMENTS

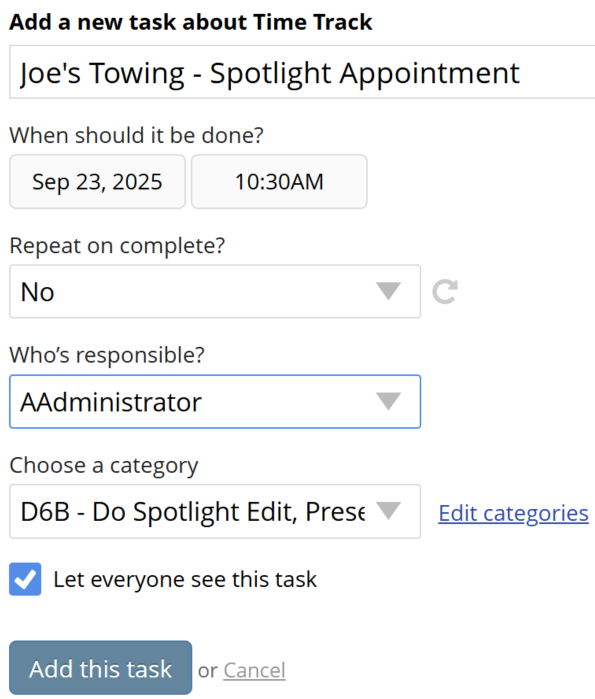
If a prospect missed their Spotlight Appointment or we miss it, do not delete the task. Simply change the When Should it Be Done time to “Later” and add a new task for yourself to Reset the appointment.

If an ESS wants to set a task for themselves whereas the prospect has not agreed to a date and time, the ESS staff can use the time 10:00pm on a specific date or “Later” which communicates to all that there is not set and agreed upon time between Company and prospect.



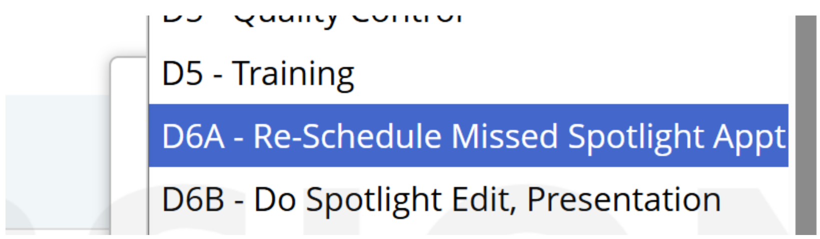


___ 11. **DRILL:** Using the Test Company you created in Drill #1, follow the instruction for **"ENTERING AN APPOINTMENT" including adding notes and the task** for the Spotlight Appointment The task should look like this:



Note: Your Manager will instruct you on who to enter for "Who is Responsible"

___ 12. **DRILL:** Simulate the prospect missed their appointment. Move the time of the Spotlight Appointment Task to Later and create a new task for yourself to reset the appointment using the category, D6A – Re-Schedule Missed Spotlight Appt



COMPLETING AN APPOINTMENT… DO THE FOLLOWING

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

b. **Add notes…** 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"
- "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 the Spotlight Appointment Task should be checked off as done if the salesperson shared the Spotlight Story with the prospect.

If the prospect is agreeable to and does participate in the Spotlight Edit AND permits the Business Consultant to 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 the prospect does not participate in the edit, they are not willing to be introduced to our company, they don't do not want to expand their business, or the business is not in a business category listed by ESS as an approved category in ESS Directives or Policies.

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, 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.

d. **Update the Company’s Profile** by finding the “Edit this Company”. Change the “Presentation?” to Spotlight Delivered, Presented CMA or New Customer. If no presentation occurred, status will be “Prospect”, “NQ” or “Ghost” if they are not responding to calls.

Prospect

Spotlight Delivered, Presented CMA

New Customer

Update other information in the profile:

05. Spotlight Presentation Done?	
06. Weekending Spotlight Presentation Done (ex. 250117)	
07. Presentation Channel?	
08. On-Time Appointment?	
09. CMA Sold?	

Complete the update of the Profile. Input the Business Consultant's Name if not already added, add client's problem they originated, number of staff, etc. Go through every tab and add any other data in the available tabs that you know about.

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 or to Later if you do not speak to the prospect. For example, the prospect did not come to work so no appointment, change the task due date to "Later" and create a new task to reschedule the appointment.

   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. Never just change the Spotlight Appointment's category, create a new task if one is needed.

f. **New Deals…** If the prospect is considering ordering a service, click on "DEALS" under the rectangle box and then create a new Deal for that service you intend to sell. If the client orders the new service during the appointment, also create a new Deal for that service.

   For the name of the Deal, list the service – Company Name, "New Website – Joe's Towing", the price, the person responsible and the product category

   If not already closed, create a task when the follow up should be completed.

   Do not add any notes inside the Deals section as all notes about the Contact and potential Deals are entered in the Latest Activity.

g. **Deals Won, Pending Lost:** When the prospect is closed, edit the Deal to "Won" or if the prospect decides not to purchase the service the Deal is marked "Lost". If the prospect is undecided and still considering ordering the service or follow up just hasn't occurred yet, leave the Deal as Pending. If the prospect becomes a ghost, mark the Deal as Lost

___ 13. **DRILL**: Enter a 3 notes in one of your Test Companies.

The first note will simply state,

> "Presentation Done – Sale"

The second note will simply state,

> "Presentation Done – No Sale"

The 3rd note will simply state,

> "No Presentation – Client had a customer arrive and reschedule till tomorrow same time"

___ 14. **DRILL**: Complete all actions with regards to tasks, notes, and Deals for your a Test Contact that did the Spotlight Presentation and ordered the Competitive Marketing Analysis for $35.

PIPELINES – The secret to producing income!

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.

___ 15. **DRILL**: Complete all actions listed below until you are comfortable creating your Pipeline.

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
Using Highrise tools can improve your efficiency. When you want to make a sale and don't know who to call even after reviewing the deals, make a list.

a. In the far 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 as the 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, appointment setter, etc.

___ 16. **DRILL**: Complete all actions listed and do over and over until you are comfortable creating lists.

KEEP HIGHRISE CURRENT

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.

Keep this Checksheet and refer to it as needed.