ERM User Manual

Sales Agent - Call Sales Daily Work Procedures

Follow each step below methodically to ensure accuracy and efficiency in the role of Sales Person/Phone Sales Rep.

You may require scrap paper to make notes for each customer, which will later be added into the ERM Database.

Remember to use the TASKBAR at the bottom of the screen to switch between programs.

Furthermore, remember to use check VIEW/ACTIVITY LIST and INBOX regularly. The steps below are your steps to follow when calling customers.Your daily task sheet is what you do each day, for each contact.

DO NOT WRITE ON THIS SHEET – THIS IS USED TO HELP YOU!

Step 1. Log into the programs as per normal.

Step 2. Click on the **VIEW > VIEW ACTIVITY/TASK LIST** in ERM found on the menu of the program.

Step 4. Look at your scheduled activities and consider your days planning. If there are any **RED background activities** they should take priority calls and and any **Priorities of High Stage** should be planned to be done first.

Step 5. After considering your days plan of activities as listed. Begin your Daily Work by clearing your activities. To clear your activities press on the clear activity button ✅ of the actual activity you are going to clear.



	Type	Day	Date / Time	Country	State	Priority
☐	Call ✅ ✏	Thu	2016/11/10 11:10	Australia	VIC	High Stage 3 Very Important

Please note the pencil button ✏ is used to edit an activity in the event an error or correction needs to be made. You should not use the ✏ Edit Button as this only edits the activity, and does not clear it.

CLEARING AN ACTIVITY with the ✅ BUTTON means that you are going to complete the call, or

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complete the activity.

Step 6. The SYSTEM will open the CLEAR ACTIVITY PAGE. This is now why do either make the call, or do the TO-DO or SEND an email or do what ever the activity requires you to do. It is strongly recommended that when you are on this page, familarise yourself with the activity or activities of the customer by ...

Step 7. Click on **ACTIVITIES TAB** to familiarize yourself with the activity that needs to be done for this contact. There may be other staff also doing things with this customer.

Step 8. Click on **OPPORTUNITIES TAB** to familiarize yourself with what opportunity is being promoted or will be sold to this customer.If there is no **OPEN** opportunity then write down below what you will be promoting or selling. If there is an opportunity, what is the opportunity.

Opportunity Name or Campaign: _____

Step 9. Click on **HISTORY TAB** to familiarize yourself with the contact's prior notes and/or phone call conversations that have been made.

Step 9. **MAKE THE PHONE CALL (by using the sophisticated VOIP LYNC phone system) or TO-DO or email: (SELL AND PROMOTE OUR SHOWS WITH ENTHUSIAM & PASSION).**

Step 10. Select **LYNC VOIP PHONE SYSTEM** and enter the phone number **<Phone>** to speak to **<Contact>.**If the contact name is not a proper name, (for example: TBA, NSW, Coordinator, Principal, Dear Sir/Madam, Care of etc) you will need to find out who is the best person to speak to is.

Step 11. When on the phone call write in the DETAILS text box, important information for you and other staff. Here are a few things you should note down.

Step 12. What number did you call **<Work / Mobile / Customer Direct etc>**
During the phone call, who answered the phone **<Name of SEC>** Did you speak to **<Contact>**? YES / NO.

IF **YES** – what was said, what happened (be specific):

_____

_____

If **NO,** who did you speak to and what happened?

Spoke to: _____**Who is the contact who makes the decision:**
_____

What is their role in the company/organisation: _____

When is the best time to call them (obtain a duration, eg: 11am – 11:30am) :

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_____

What was said, details of what happened: _____

_____

Step 13. **Will you be sending the contact an email with promotional info**? YES / NO.

IF **YES** – what is the contact's work email address (check above), if different, what is the correct one:

Contact's work email address: _____ (is that contact in our database?)

IF **NO** – (you should add the customer details to the existing company by using the Add Customer to Company BUTTON.

IF **YES** - What information are we sending them:

_____

IF **NO** – why? _____

Step 14. **Are you going to do a follow up CALL with this contact**? (remember that 99% of the time a follow up is required to be done) YES / NO.

IF **YES** – what date? _____what time? _____

IF **NO** – why? _____

Step 15. Thank the contact or person you were speaking to and **END** call on **LYNC Phone System. Start next call/sales sheet.**

Step 16. **Is the contact going to book a show**? YES / NO

IF **YES** – what date: _____ (did you check for availability and region?) YES / NO

what show (name of show or event to book): _____

qty attending (number of persons attending): _____price offered per head: $_____

was a discount offered?YES / NO, if **YES**, what was the discount? _____

Inform contact, that our accounts department will complete the booking and send them the confirmation letter. And that they can pay when they receive the Tax Invoice.

IF **NO** – why? _____

Step 16. **You are done.** Either send the email to the customer now or start from Step 1 again and begin again.

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Attached files:

Unique solution ID: #1133
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