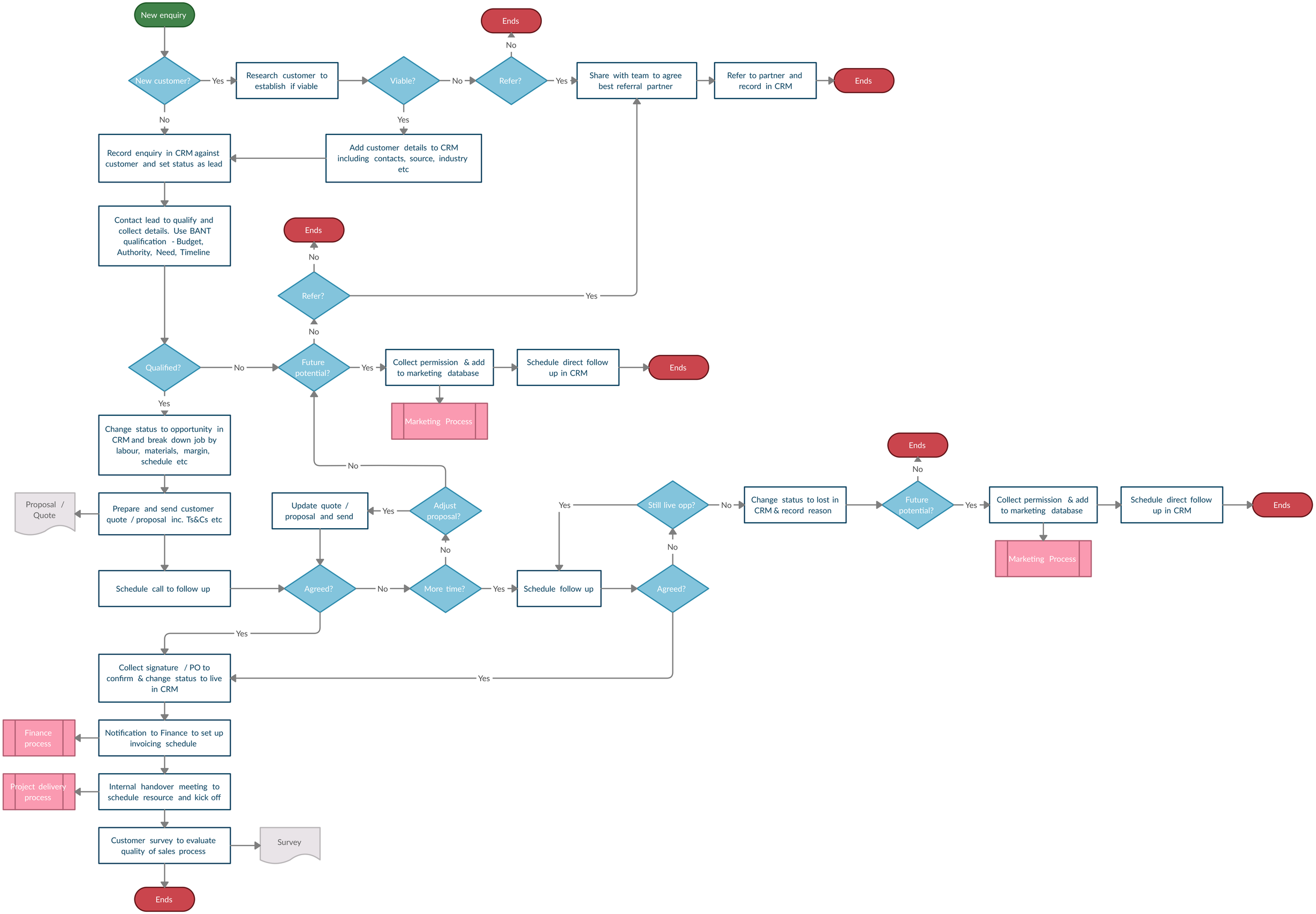
New enquiry
New customer?
Yes
No
Research customer to establish if viable
Viable?
No
Yes
Refer?
No
Ends
Yes
Share with team to agree best referral partner
Refer to partner and record in CRM
Ends
Add customer details to CRM including contacts, source, industry etc
Record enquiry in CRM against customer and set status as lead
Contact lead to qualify and collect details. Use BANT qualification - Budget, Authority, Need, Timeline
Ends
No
Refer?
Yes
No
Qualified?
No
Future potential?
Yes
Collect permission & add to marketing database
Schedule direct follow up in CRM
Ends
Marketing Process
Yes
Change status to opportunity in CRM and break down job by labour, materials, margin, schedule etc
No
Ends
No
Proposal / Quote
Prepare and send customer quote / proposal inc. Ts&Cs etc
Update quote / proposal and send
Yes
Adjust proposal?
Yes
Still live opp?
No
Change status to lost in CRM & record reason
Future potential?
Yes
Collect permission & add to marketing database
Schedule direct follow up in CRM
Ends
Marketing Process
No
No
Schedule call to follow up
Agreed?
No
More time?
Yes
Schedule follow up
Agreed?
Yes
Collect signature / PO to confirm & change status to live in CRM
Yes
Finance process
Notification to Finance to set up invoicing schedule
Project delivery process
Internal handover meeting to schedule resource and kick off
Customer survey to evaluate quality of sales process
Survey
Ends