

SALES PROCESS

LEADS

A lead is a potential job with a status of lead and is linked to a client record (who is a target, active, dormant client). It is linked but sits separate to the client record.

A lead is a potential job that has not been qualified. The goal of the assigned surveyor is to try a convert to an opportunity or qualify it out of the sales funnel.

Show the number of days it has been a lead for. Also show the source of the lead (this is a different record from the source of contact).

REFERRAL

If it is a referral then link the potential job to the referring contact as well (the contact will need to be listed in your database). This will allow you to view all job referrals from specific source.

And also the outcome of those referrals (% success; total £).

QUALIFICATION

Important to use a consistent qualification criteria to evaluate the likelihood that it will turn into a genuine opportunity.

BANT. Do they have a BUDGET? Does the contact have AUTHORITY? Is there a NEED for the work? Is there a TIMEFRAME?

Only when all 4 criteria are yes then it is moved to an opportunity. Equally important to qualify potential jobs out of the funnel so time isn't wasted.

OPPORTUNITIES

Once qualified a potential job becomes an opportunity. This might be before or after a proposal / quote (it will depend on the job).

Important to update the estimated value and to record the date when it becomes an opportunity.

FOLLOW UP

Set regular intervals to follow up and record when these happen and set a future date if no decision has yet been reached.

No need to make it too detailed, just date, contact type, notes, planned follow up.

REPORTING

Produce a monthly sales report that shows

- Number of leads in the funnel and value
- Number of opportunities in the funnel and value
- Conversion rates leads>opportunities>jobs
- Average duration (lead>job)
- Sales won; jobs and value this month
- Forecast new business next month

Some of these figures will take time to collect so the reports will be built up over time.

