Lead Follow Up & Management – Best Practice

This document outlines the processes advised by CPB, to maximise the potential of all the sales leads you are allocated.

When you are allocated a sales opportunity:

- Ensure that the lead is reviewed within 24 hours
- Follow up the lead within 24-48 hours
- Flag the opportunity within your internal CRM platform
- If there are any potential issues, please flag to CPB within 1 week max. – **feedback is key!**
- Make sure that the opportunity is deal registered

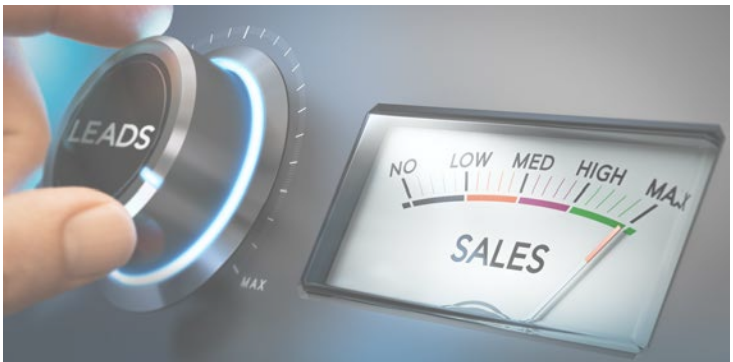
Do not lose hope if the contact does not stick to the agreed call to action.
Be proactive with getting through to the end user, persevere:

Email the end user | **Call the end user** | **Connect via Social channels**

- If a direct line or mobile number is not provided in the lead sheet, try to gain this from reception
- If you are getting the contact's voicemail, leave a message stipulating the date, time, reason for your call, how to reach you and that you will call back later
- If a receptionist is blocking the call, try to get around reception. You could call back and ask for a department, i.e. "can you put me through to Accounts Payable please"? When you have been transferred, "I think I've been put through to the wrong extension, I need Joe Bloggs in IT please". Often a department will put you through to the contact's extension with no questions asked.

- Update, track, and manage the opportunity via your CRM, throughout its sales cycle
- Arm yourself with an arsenal of specific information you can send to prospects on request
- Send relevant, valuable information to every prospect regularly, relentlessly, and frequently
- Ensure that you involve the necessary resource if assistance is required in any remit of lead progression, i.e. internal Marketing, Distribution, Vendor etc.

BE PERSISTENT – BE SPEEDY – BE RELIABLE



CPB's Lead Ratings Explained ...

Appointment Qualified Lead (AQL)

- This opportunity has either a virtual meeting, web demonstration or telephone appointment arranged
- This opportunity has been secured with a calendar invite, which has been accepted by the end user
- This opportunity has been qualified to CPB UK's BANT+A lead qualification parameters
- This opportunity now needs to be followed up by your Sales / Account Management team (recommended within 24-48 hours) with an introductory call and to pre-qualify the lead notes, agenda of the upcoming call to action etc.

Opportunity Qualified Lead (OQL)

- This opportunity provides indicative timescales for the agreed call to action to take place
- This opportunity has not been sent a calendar invite
- This opportunity has been qualified to CPB UK's BANT+A lead qualification parameters
- This opportunity now needs to be followed up by your Sales / Account Management team (recommended within 24-48 hours) with an introductory call to schedule a precise date / time for the virtual meeting, web demonstration or telephone appointment to take place (Account Manager to send invite) and to pre-qualify the lead notes, agenda of the upcoming call to action etc.

Renewal Qualified Lead (RQL)

- This opportunity provides insight into a potential medium- or long-term project to start nurturing in the interim
- This opportunity does not fall into CPB UK's 'short-term' lead criteria and is designed to provide visibility and intelligence of the end user's future requirements
- This opportunity now needs to be nurtured by your Sales / Account Management team with introductions about your services and offerings, as well as to identify if there are any other interim projects that you can be of assistance with, so as to already be engaged with the end user in some way for the future project specified.

CPB UK Ltd, Nortec House, 12 North Bar, Banbury, OX16 0TB

www.cpbuk.co.uk

01296 263410