J.M. FIELD MARKETING

Standard Operating Procedures (SOP)

Fulfillment Leads & Onboarding Process

Date: 05/18/18
Author: KP

For more info and how-tos to do anything here go to:
support.jmfieldmarketing.com/leads-management-sop (password: pw)

1. **Daily Setup**

    a. Launch Pipedrive
    b. Launch LiveChat
    c. Launch TalkDesk
    d. Make Sure You're Covering Ext. #120 (instructions at bottom)

2. **Receive New Leads & Review**

    Leads will arrive daily via phone, email or live chat. Monitor Pipedrive to receive leads from Unbounce forms and keep LiveChat and TalkDesk open to receive leads via phone/chat. When a new lead arrives (whatever method) follow these steps:

    a. Review Leads in LEAD IN column on Pipedrive, if good, proceed
    b. Initiate First Contact: reach out via phone call and use the "First Contact Questionnaire" to have a conversation and gather information.
        i. If answer, move to step 3.
        ii. If no answer, follow up with an email to invite person to later conversation (template First Contact 2.0)

3. **First Contact**

    When first contact is made via phone call with a lead, use the "First Contact Questionnaire" to guide the conversation and gather info:

    a. What's the actual product that you're selling/shipping? Tell me about your business.
    b. Are your operations B2C, B2B or are you shipping for internal purposes?
    c. How many orders per month are you shipping?
    d. What channels are you selling on?
    e. How many SKUs do you sell?
    f. Are your products barcoded? (not mandatory, but definitely preferred)
    g. How much storage space do you require (in pallets)?
    h. What are the general weight/dimensions of the products (this isn't mandatory, but it helps deliver a better proposal)?
    i. How are you shipping now? Is there pain-points (if yes, address these and how we would fix)?

3570 NW 53rd Court, Fort Lauderdale, Florida 33309
P: 954.523.1957 | F: 954.523.1814 | E: info@jmfield.com | www.jmfieldmarketing.com

j. How soon are you looking to move?
k. Important: get company name, name, phone number, email

Record all notes from call in Pipedrive – if Pipedrive isn't available when you're having a conversation take notes for input later.

4. Qualify & Send Pricing

After you've established contact and gathered the information you need, qualify them internally and determine if JMF can deliver a proposal. If yes, proceed:

a. Open PandaDoc
b. Create new document
c. Populate relevant info in tokens such as company name, etc.
d. Add recipients and send doc
e. In Pipedrive, move the deal into "Proposal Made" status

5. Follow Ups

Every day leads will need to be followed up on. Pipedrive automatically places deals at the top of the column that require action.

a. In Pipedrive, deals that require follow up will rise to the top of each column and will have a red bubble icon
b. Open the deal and review the last contact, then follow up via phone/info
c. After a phone call or action, ALWAYS mark a task complete or make a note so that a record is taken and can be referenced later.

Note: if you need to know what stage a lead is in, or see last communication, open the "Deal" and read the timeline.

Other How-Tos

1) LiveChat Management

a) Login to LiveChat
b) Bottom left corner click the avatar and make sure "Accept Chats" is selected. Green dot will be visible.
c) New chats will automatically appear
d) Be sure to always select "Don't Accept Chats" when away from desk
e) To automatically create a DEAL in Pipedrive from a live chat, complete the below:
   i) In LiveChat, click the MORE button in the top left of the chat window
   ii) Select CREATE TICKET
   iii) In TICKET SUBJECT field, put "Lead: [company name]" (you must use this exact format for it to work)

3570 NW 53rd Court, Fort Lauderdale, Florida 33309
P: 954.523.1957 | F: 954.523.1814 | E: info@jmfield.com | www.jmfieldmarketing.com

iv) Click CREATE TICKET, deal will now be created in Pipedrive with all contact info and chat history.

2) **How To Cover extension #120 (Kyles phone)**
If you're setup to cover leads, your phone will have this feature. Kyle will always confirm with you before handing off leads coverage and covering the #120 extension.
a) To turn a cover button on your phone: your phone will be ringing when Kyles phone rings
b) Press feature 00
c) Press the button on your phone that you wish to designate- usually a top one above the number pad
d) Press *40 and extension you wish to cover (kyle is 120)
e) Lift handset and hang up
f) To turn off cover
g) Press feature 00
h) Press the button you had chosen as the cover button
i) Press *49
j) Lift handset and hang up

Miscellaneous:
- All lead submissions are automatically input into Pipedrive via integrations, including JMF form and landing pages.
- Exceptions to this are phone calls, these will need to be manually created in Pipedrive

3570 NW 53rd Court, Fort Lauderdale, Florida 33309
P: 954.523.1957 | F: 954.523.1814 | E: info@jmfield.com | www.jmfieldmarketing.com