1103: Lead Log Policy

1100: All Sales Policies · https://milo.masseyservices.com/docs/1103-lead-log-policy/

Section: Sales
Subject: Lead Log Policy
Approved by: Harvey L. Massey
Effective Date: 18 March 2004
Last Reviewed Date: 18 March 2004
Policy Owner:

Policy

> WE ARE COMMITTED TO ONGOING TRAINING AND EMPLOYEE EDUCATION WHICH DEVELOP PRIDE, JOB ENRICHMENT, AND PERSONAL AND PROFESSIONAL GROWTH.

- The Lead Log is one of the most important Sales Management tools used by the General Manager to assist in evaluating, coaching and improving the sales skills, performance and productivity of all Sales Team Members.
- By properly utilizing the lead log, the General Manager can monitor and assure same day response on leads, quality inspections, quality paperwork and proposals, complete and thorough presentations regarding problems, solutions, guarantees, . . . and proper follow up on all leads.
- Correctly used, the General Manager can coach all Sales Team Members in the areas of time management, inspection techniques, sales presentations, sales objections and how and when to ask for the order (closing).
- The General Manager’s ultimate goal is to utilize his Sales and Service Team Members to accomplish the following objectives:
  - Close a minimum of 75% of all office leads.
  - Generate a minimum of four (4) additional calls around every office and website lead.
  - Generate a minimum of 1.5 sales for every office and web lead received.

- In accomplishing these goals, our Team Members will prosper, as well as make a beneficial contribution to the growth, security and future opportunities of all Team Members, our Company, and Our Customers.

Administration

- Answer and handle the phone and prospective Customer with a smile in your voice, expressing interest, care and concern for their problem and request. Take all lead information and enter it in the “Service Center Call Book.”
- Determine territory for assignment of lead.
- Set an appointment with the customer. Enter customer information on sales appointment log by entering the prospective customer’s name, address and phone number. A separate page is to be maintained for each Sales Team Member per day.
- From the Service Center Call Book, enter the customer information in the lead log by entering the date/time received, the prospective customer’s name, address, phone number and marketing source code on the Sales Team Member’s Lead Log. A separate Lead Log is to be maintained for each Sales Team Member. It is a primary responsibility of the Office Manager to assure that all leads are taken from the Service Center Call Book and recorded in the Lead Log each day.
- Every lead will reflect a “Marketing Code” which indicates how the prospective customer learned about our Company. The Marketing Codes are as follows:

Abbreviation	Marketing Code
T	Television Ad
DM	Direct Mail
R	Radio Ad
WL	Website
YP	Yellow Pages
RL	Referral
BB	Billboard
V	Vehicle

Abbreviation	Marketing Code
O	Other

- Every lead entered should be designated as an Office or Website Lead under the “Type of Lead” column. Service Leads should be listed on a separate Lead Log due to split commission sales, etc.
- Indicate the service type as designated by the codes in the appropriate column under “Type of Lead,” i. e. PP for Pest Prevention, TP for Termite Protection and LC for Lawn Care.
- Enter date of scheduled appointment in “Date of First Contact” column.
- At the end of the day, place all Lead Logs and Sales Appointment Logs on the General Manager’s desk for review and for conducting the daily accountability check-in session each morning.

General Manager's Responsibilities

- Every General Manager will conduct a “Daily Check-In Session” each morning beginning at 8:00 a.m.
- Follow up daily with each Sales Team Member on the action taken on each lead until lost or sold.
- Enter the date that the prospective customer was first contacted in the “Date of First Contact” column, if different from the “Lead Received” column.
- Enter the date that a proposal is made in the “Proposal Date” – using the service type codes listed for each service.
- Enter the total price of the proposed contract in the “Value Pending” column.
- Enter all “Callback Dates” in the columns provided. (These need to correspond to the callback dates on the Daily Sales Activity Report.)
- Enter any comments concerning the proposed contract in the “Comments” section.
- Upon sale of the contract, enter the dollar amount in the “Value Sold” column. In “Comments” section, enter “Sold/Type of Job” (i.e. annual, one-time, traditional liquid, bait, fume, etc.) and the sold lead will be highlighted or line out in “black.”
- If the sale is lost, the reason for loss is placed in “Comments” column and the lost lead shall be highlighted or line out in “red." This will differentiate lost leads from those pending and sold.
- Any entry in the Lead Log which is determined not to be a bona fide lead (i.e. reinspections, creative callbacks or any other administrative error), will be highlighted or lined out in “blue” in

the Lead Log and notated in the comment section. The lead count will be adjusted accordingly in the lead log and on the

- Daily Sales Activity Report.
- A summary of the lead status color codes are as follows:
  - Sold leads, highlight or line out in “Black”
  - Lost leads, highlight or line out in “Red”
  - Not a bona fide lead, highlight or line out in “Blue”
  - Pending Entries will be left open.
- After the daily check in with the Sales Team Member, return the Lead Log and Sales Appointment Log to the Administrative Staff for entering new leads, as received.
- At the end of each month, a lead count reconciliation must be performed using the Service Center Call Books, Lead Log, Daily Sales Activity Reports and other Computer Reports to assure an accurate count and performance on all leads before submitting the final sales recap to Corporate Operations and Marketing.
- The ***General Manager must contact “lost leads”*** to determine “Why they didn’t buy from our Company.” When calling, these questions should be explored:
  1. Did we keep the appointment and were we on time?
  2. Did we make a thorough inspection?
  3. Did we offer a logical explanation of the problem? Solution?
  4. Did we put it all in writing (proposal)?
  5. Did we explain the features and benefits of our guarantee?
  6. Was our price competitive?
  7. Specifically, why didn’t you buy from us? Who did you buy from?

The ***General Manager will evaluate and analyze the responses from “lost leads”*** and make the necessary adjustments, including:

Instructions to Sales Team Members, including working in the field with Sales Team Members and offering corrective instructions.

Recommendations to Regional and Corporate Management, in addition to the Marketing Department.

Dowloads

Embedded media: https://milo.masseyservices.com/wp-content/uploads/2025/09/1103-Lead-Log-Policy.pdf

1103 Lead Log PolicyDownload