P & P No.: 1103-A
Section: Sales
Subject: Lead Log Policy
Approved By: Tony L. Massey
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Policy Owner: Vice President of Business Development

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

- The Lead Log is one of the most important Sales Management tools used by the General Manager and others responsible for growing our business 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 ensure prompt and/or 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.
- The Lead Log facilitates communication between New Construction, Customer Care, and the Service Centers to ensure that every lead and appointment (company generated as well as creatively developed) is reported, assigned, and followed up until it is Sold or Lost.
- The Lead Log provides the Service Centers with additional tools to understand, manage, and report lead/appointment counts, proposals, closing rates, and mix of business success. It will assist the General Manager and Inspectors with researching old proposal information and be more effective on follow-up.
- The General Manager's ultimate goal is to utilize his Sales and Service Team Members to accomplish the following objectives:
    1. Close a minimum of 75% of all office leads.
    2. Generate a minimum of four (4) additional calls around every appointment as well as propose multiple services per lead or appointment per company standards.
    3. Generate a minimum of 1.5 sales for every office and web lead received as well as achieve a services-to-appointment sold ratio as described per company standards.
    4. Achieve sales budgets consistently.
- 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.

I. ADMINISTRATION RELATING TO INBOUND LEADS AND APPOINTMENTS

1. 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." Remember to ask the customer how they heard about our company. NOTE: In addition to prospective and current customers calling in to schedule an inspection, Sales Team Members will be calling in their creatively developed sales appointments. The procedures for adding these appointments are the same as described below.
2. Determine territory for assignment of lead/appointment.
3. Set a schedule date and time with customer. Enter customer information in the sales appointment log by entering the prospective customer's name, address, and phone number(s). A separate page is to be maintained for each Sales Team Member per day.
4. It is a primary responsibility of the Office Manager to ensure that all leads/ appointments (whether new or changes in currently scheduled appointments) are taken from the Service Center Call Books and recorded in the Lead Log as they are received. Refer to P&P 1103-B for directions on how to enter and update information in the Lead Log.
5. It is a primary duty of the Office Manager to reconcile the Lead Log, Appointment Log, Call Books, DOR, and recaps on a daily basis.

II. ADMINISTRATION RELATING TO PREPARING FOR DAILY CHECK-INS AND UPDATING INFORMATION DAILY

1. Every General Manager will conduct a "Daily Check-In Session" each morning per Sales P&P #1102, using the Daily Check-in Report and any other appropriate report or tool. While checking in each Inspector, the General Manager will update each pending lead by writing in the proposal amounts, callback dates, sales amounts, and notes in the space provided on the Daily Check-In Report. The General Manager will also note which leads have been "Sold," "Lost" (along with reason), or are "pending" along with proposal info and a call back date. Upon completion of check-in, the General Manager will return the updated Daily Check-In Report to the Office Manager so the new information can be added to the computer record in conjunction with the Office Manager's morning posting, DOR, and data entry work.
2. The Office Manager will update all of the Daily Check-in Report and Lead Log entries every day **as part of their morning work** and as additional leads are called in throughout the day. The updates, along with the new leads added during the day, will provide the General Manager the most up to date and accurate Lead Log to use for the next morning's check-in. Refer to P&P 1103-B for directions on

how to enter and update information in the Lead Log.
3. At the end of each day, print the Daily Check-in Report for each Inspector/Account Manager and place it with the Sales Appointment Logs on the General Manager's desk for review and for conducting the daily accountability check-in session each morning.

II. ADMINISTRATION RELATING TO ACTIVATING, INACTIVATING, AND IDENTIFYING WORK STATUS FOR INSPECTORS AND OTHER TEAM MEMBERS

1. All Sales and Service Team Members in a Service Center are to be activated in the Lead Log by the Office Manager upon being hired. Refer to P&P 1103-B for directions on how to enter and update Team Member information in the Lead Log through the "Manage People" section of the Lead Log.
2. When inputting Inspectors, the Office Manager should ensure that they are correctly coded as an "Inspector" and, likewise, should ensure that technicians, Service Managers, etc. are correctly coded as NOT being an Inspector.
3. On days where the Inspector is in training or on vacation, the Office Manager is to correctly code this in the Lead Log. Failure to input this information will result in misleading information.
4. When a Team Member leaves the Company or is transferred to another Service Center, the Office Manager is to inactivate the Team Member in the "Manage People" section of the Lead Log.