	<h1 style="text-align: center;">Profiling and Qualifying of Customer</h1> <h2 style="text-align: center;">Policies and Procedures</h2>		Document Number: 2P-SAL-12.01
	Department: F2 Logistics Philippines Inc.- Sales	Effective Date: July 25, 2018	Revision No 1

Scope

Starts with generating list of qualified accounts and ends with encoding of customer information in the CRM (Customer Relation Management) System.

Objective

- To build a strong database to ensure the bottom level of sales pipeline are always full by continuously getting new prospect that can convert into a potential customer.
- To be able to determine potential customers who are fit, able, willing and authorized to buy.
- To sell more and boost company's revenue.


Policies

1. Sales in-charge shall be able to generate prospect accounts by conducting any of the following:
 - Telemarketing
 - Sales Blitz
 - Networking
 - Secure lists of company directories
 - Secure lists of participants and company information during events and sponsorship activities
 - Conducts company research using website
 - Maximize use of technology and social media

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2. Sales in-charge shall be able to qualify six (6) prospect accounts per month. Qualification is asking the following:

- Name
- Commodity
- Origin
- Destination
- Volume
- Frequency
- Service Type
- Service Mode

References/ Source (Any of the following):

- CRM
- Sales Reports
- Emails


Definition/s:

- Cold Prospect- uninterested to buy your services
- Warm Prospect – customers with possible service requirements in the future.
- Hot Prospect – customers with immediate service requirements.

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- CRM (Customer Relation Management) - is a business tool that allows sales personnel to manage information of customers, partners, workflow processes, communication, productivity, sales activities such as report and itineraries.

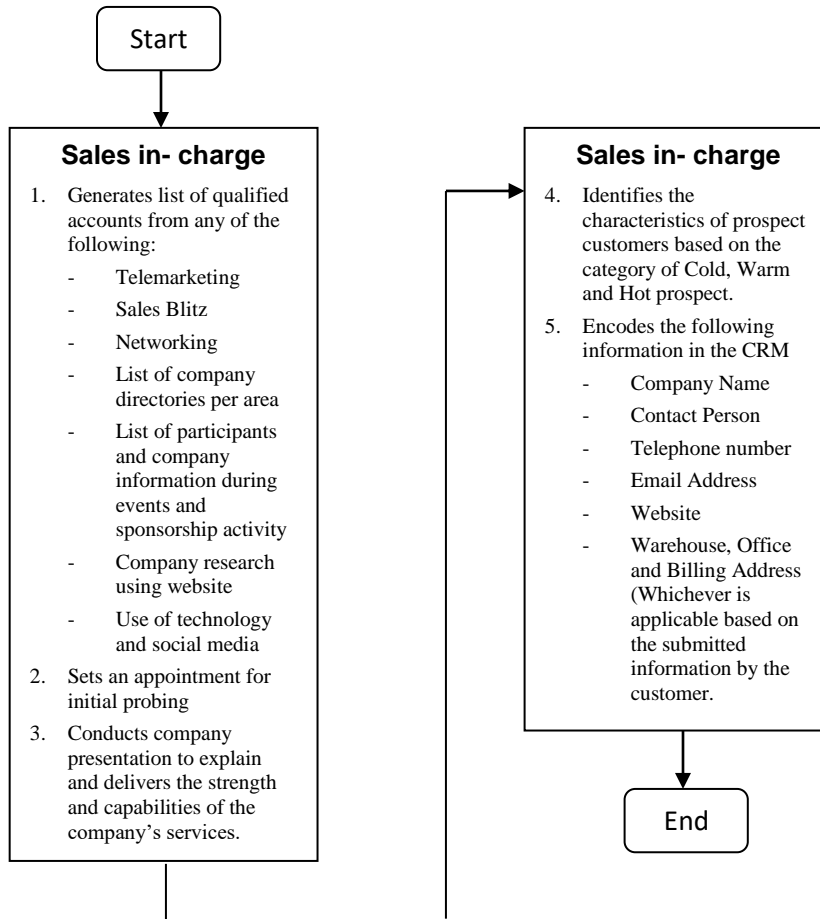
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Procedures



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