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.

Definition/s:

- 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.

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

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

Procedures

Start

Sales in- charge

1. Generates list of qualified accounts from any of the following:
   - Telemarketing
   - Sales Blitz
   - Networking
   - List of company directories per area
   - List of participants and company information during events and sponsorship activity
   - Company research using website
   - Use of technology and social media
2. Sets an appointment for initial probing
3. Conducts company presentation to explain and delivers the strength and capabilities of the company's services.

Sales in- charge

4. Encodes the following information in the CRM
   - Company Name
   - Contact Person
   - Telephone number
   - Email Address
   - Website
   - Warehouse, Office and Billing Address (Whichever is applicable based on the submitted information by the customer.

End

DDC: This Document is already Approved and Posted on Intranet.

Please refer to printed files for signatures of approvers.

Any printed and saved copy of this document is considered uncontrolled