	Profiling and Qualifying of Customer Policies and Procedures		Document Number: 2P-SAL-12.01
	Department: Sales	Effective Date: September 5, 2025	Revision No 2

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.

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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

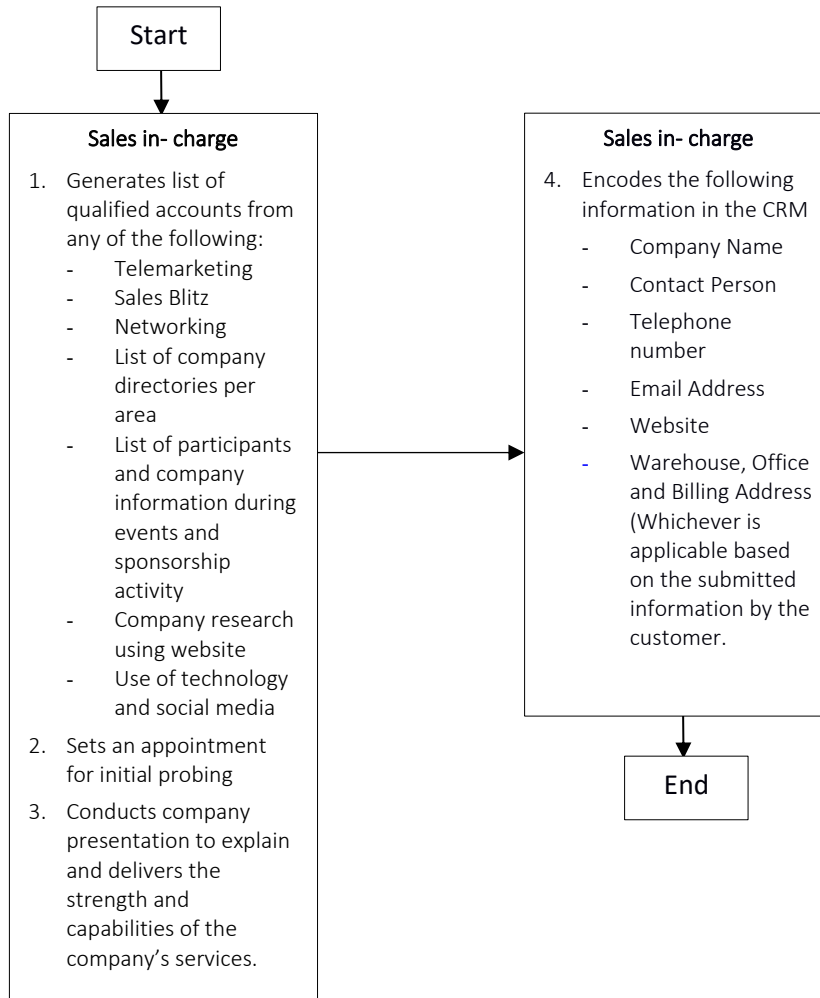
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Procedures



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