



Standard Operating Procedure (SOP)

(CA-Lead Processing)

[11/20/23]

[Revision Number 1]

[10/20/24]

[R Byers/ Sales Manager]

Objective:

[The objective of this SOP is to clearly outline the correct process to convert all inbound marketing leads into deals, and convert them into Bid Scheduled or close them out.]

Scope:

[This process is the end of the Marketing Funnel and the beginning of the Sales Funnel. This is where we turn a prospect into a deal.]

Responsible personnel:

[This SOP applies to Client Advocate & Receptionist Roles. It is overseen by the Office Manager and Sales Manager]

References:

This video covers this process:

<https://share.vidyard.com/watch/4UfaY3m74yU2Rx78maVpUX?>

Procedure:

1. ****Checking the Inbox****

a. The Hubspot shared inbox should be checked at least every 15 minutes during business hours.

2. ****Zero the Inbox****

a. Clearing or Zeroing the Inbox begins with creating a deal for all inbound inquiries that have provided enough data to do so. This ensures we do not miss any potential leads while working our Marketing Pipeline.

b. Once the deal is created in the marketing pipeline, you can close out the conversation in the inbox, and your one email closer to zeroing it out.

3. ****Go Through the Marketing Pipeline****

a. Leads not contact should be contacted within 15 minutes. Contact the lead, get all information and schedule their bid.

b. FU #1 should be done 24 hours later.

c. FU #2 should be done 48 hours later

d. FU #3 72 hours after initial contact

e. Let sit for 1 week after 3rd attempt before moving to Closed/Lost

****Documentation:****

This video covers this process:

<https://share.vidyard.com/watch/4UfaY3m74yU2Rx78maVpUX?>

****Review and Revision:****

[Describe the process for reviewing and revising the SOP, including the frequency of reviews and who is responsible for initiating revisions.]

****Approval:****

[Specify the approval process for the SOP, including the names and positions of those who need to approve it.]

****Distribution:****

Client Advocates, Receptionist

****Acknowledgment:****

Client Advocates and Receptionist should acknowledge understanding of this SOP.

Add photos as needed to help better describe the procedures.