

Key takeaways

Nailing the Sales Process

Set good expectations

A good sales process starts with setting expectations

- Enter in contacts when they reach out or reuse existing contacts to avoid duplication
- Document important details in the lead setup like the source of the lead and the job type
- Create custom fields relevant to your business
- Set up Saved Filters & Grid Settings for users based on those custom fields
- Track when activities are being completed; the software is as useful as you make it

Keep a record

Keep a record of everything, you never know when you'll need it

- Use activities to document conversations from email, text, meetings and phone calls
- Set up sales procedure activity templates
- Upload all documents to leads as needed (photos, pre-sale documents, etc)
- Once a job is lost or sold, change statuses of the lead so reports are accurate

Attract new customers

Use your high-tech system to attract new customers looking for more

- Set up a client login portal on your website
- Link website with the contact form
- Send proposals via Buildertrend to receive approvals
- Outline what sales proposal templates you need and build them



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