Sales Call Wrap-up

Transitioning from post-call ***page*** to post-call ***stage***

Introduction

The Post-Sales Call Page was introduced in early November 2019 to capture relevant data about HTM sales calls:

- Did prospect show?
- Did prospect buy?
- “No” reason
- Etc.

Specifically, the intention was to capture data around the “green” sales appointment calls scheduled through Acuity.

Since then, the “**Deals**” feature within ActiveCampaign is gaining use as a sales planning and tracking tool within the HTM Sales team.

Combining the post-sales call data with deals creates a powerful tool to maximize the revenue from the sales pipeline, as well as simplify managing the contacts that flow through it.

This document describes how the deals feature will replace the Post-Sales Call page and how to use it.

Page vs Deal

Capturing the post-sales call data in the page vs in a deal is conceptually the same:

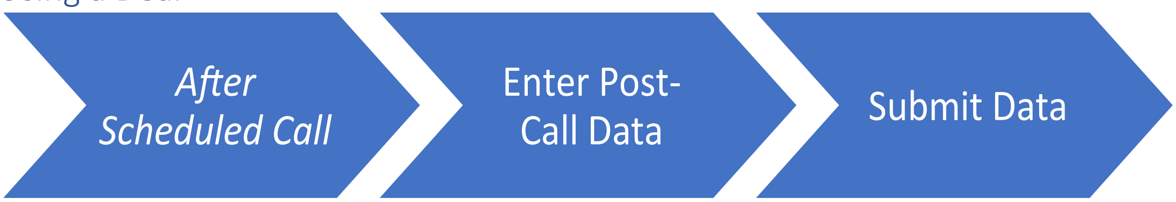
Current Process (Page)

Go to Page

Fill out form

Click Submit
Correct if necessary

Using a Deal



Go to Active Campaign

Find deal
Fill out deal fields

Correct if necessary

The Data

The data that is captured is identical whether using the page/form or the deal/fields. The list and drop-down values are the same as well.

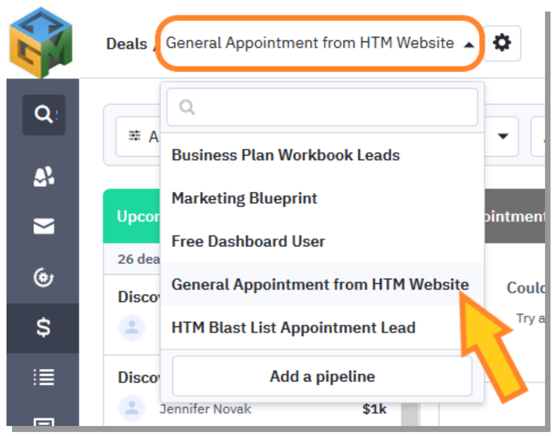
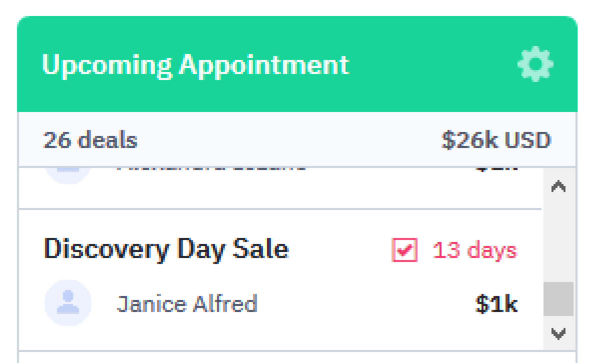
> IMPORTANT: the data captured in the current page/form is stored **once per contact.** This means that data from each new sales call will overlay the previous one(s).

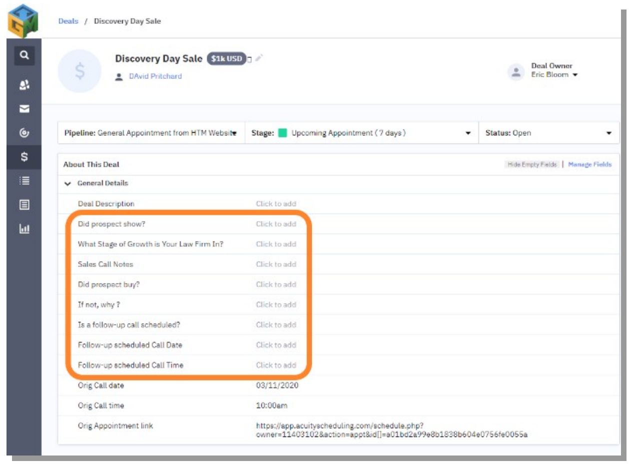
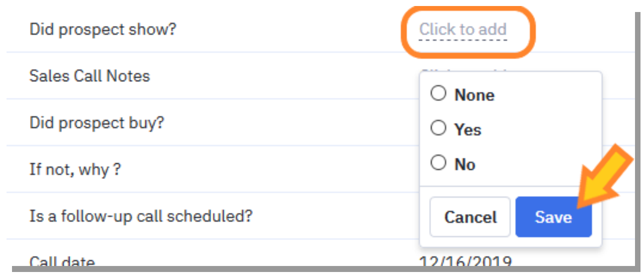
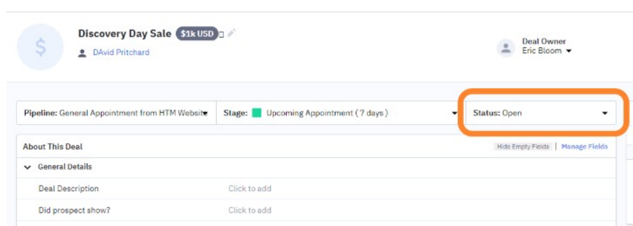
The new way using deals stores the data per each deal. That way, we can have a good record of why a given customer bought (or did not buy) a given product.

FYI, in the deal record the scheduled call date, call time, and Acuity scheduling link are pre-filled into deal fields.

How To

Follow the steps:

Log in to AC	https://howtomanage.activehosted.com/
Go to Deals	
Select pipeline: *"General Appointment from HTM Website"*	
Open customer's deal record: In first stage, "*Upcoming Appointment*". FYI, the deal name for the green appointments is "*Discovery Day Sale".* The deal name is not important for the rest of this process, just an FYI.	

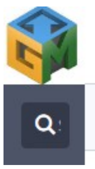
Update deal fields *Did prospect show?* *What Stage of Growth is Your Law Firm In?* *Sales Call Notes* *Did prospect buy?* *If not, why?* *Is a follow-up call scheduled?* *Follow-up scheduled Call Date* *Follow-up scheduled Call Time* Note that the original Call date, Call time, and Acuity Appointment link are pre-filled into the deal for your reference.	 
Finalize the deal Once prospect buys, or you are confident that they will not buy, set the status to "won" or "lost".	
Done.	

Pro Tip: Find all deals for a Contact

You can quickly see all deals for a given contact in their contact record.

Pull up the contact record by

- Searching by name or email



- Or, clicking contact name in the deal record, or anywhere else you see it

Click the “Deals” tab: