
monday.com
BEST PRACTICES

INITIAL DATA ENTRY

- Begin entering new prospects acquired from **November 1, 2020 onward.**
- Only enter prospects with an **estimated revenue of $10,000 or greater**
- **Always search the database before entering any new prospect.** (i.e.- if you have a new prospect "ABC Company Inc" – perform a keyword search for "ABC" to determine if there are any similar matches already entered in the database)
- **Enter new prospects as soon as you receive them.** While it is not mandatory to enter your leads into the system, anything not entered is potentially at risk of someone else claiming it. You may create your own separate list, but until those leads are entered into the main database, they are potentially up for grabs.

INITIAL DATA ENTRY

When entering a new prospect:

- **Always confirm the formal/proper business name** and enter
- **Double-check spelling**
- **Enter full address**, phone, email, website, any additional notes, title, **primary contact**
- Enter your **estimate for possible billing value** ($10k or greater) of your prospect in the proper space. If unsure, quote the lowest number possible as to not overinflate forecasting numbers.

INITIAL DATA ENTRY

- **Location** – if you get a lead in the same area of an existing office, contact that local office to see if there is any additional information available or any conflict that could arise. Local office involvement is a global best practice.

- **Views** – when in Monday.com on your computer (or within the mobile app) – you can select “My Leads” in the view table. This will automatically sort your view to only see your prospects. Use this view to simplify the information and only want to review your own leads.

- **Ask for help** – if you have any issues with formatting, how to enter information, or any general inquiry about Monday.com, contact Eric or Ashleigh immediately.

FROM DISCOVERY TO PROPOSAL

Keep your clients segmented properly (within the proper status of the Frost, PLLC Sales Funnel)

- ***Discovery*** – The Discovery stage is just that. We don't have details yet and have not yet made contact. We are still gathering information in order to make the best contact possible. May be a referral from COI not yet followed up on. Essentially this prospect is now "on your radar".

- ***Relationship*** – Contact has been made and a first meeting has occurred. Going forward, we are developing this relationship with the intent that an "ask" for the business is to follow. This stage could take days, weeks or even months.

FROM DISCOVERY TO PROPOSAL

Keep your clients segmented properly (within the proper status of the Frost, PLLC Sales Funnel)

- ***Proposal*** – Officially have asked for the business and a proposal has been made.
- ***Win/Lose*** – exactly that. Was the new business won or lost?

FROM DISCOVERY TO PROPOSAL

- **Always keep your information updated**
- **Monitor customer conversations and record them in the proper location** – In Monday.com, *right next to the prospect name is a conversation bubble.* By clicking on this bubble you will open a conversation box. Any entries made here will be retained with a date of entry for future reference. Utilize this box whenever you are making a note that you might need to reference in the future. This conversation dialogue will always be retained.
  - Note any calls made, emails sent, appointments held
  - Utilize the mobile app to enter new comments and ensure you are always up to date on current prospect status.
  - Assign yourself tasks/reminders to follow up and maintain an “active” lead list

WON / LOST BUSINESS

- **Move any prospect to either the Won or Lost** status once confirmed.

- Update and confirm the proper **“won value”** in the billing column.

- Any **prospects moved into the Won or Lost columns will be retained for 60 days**, at which time they will automatically move over to the Business won or Business lost Archive for permanent retention.