

SCRIPT Professional Greeting

“Thank You for calling U.S. Flash & Technologies this is _____ , how may I help You.

CSOP-A

Client Has Concerns About An Order that is in process or Order that has shipped

Calling to get information about a current order that has shipped

“I can help you with that. What is your Company name and purchase order number, what is your phone number in case we get disconnected” What can I help you with specifically.

Pull up the order in Netsuite and listen to clients concerns. Transfer the call to the NAM if the callers concern has to do with any of the following:

1. Invoice in box
2. Delivered late
3. Missing product
4. Product is damaged or not working
5. Missing upload / Missing Accessories

Calling to get information about a current order that has not shipped

“I can help you with that. What is your Company name and purchase order number, what is your phone number in case we get disconnected” What can I help you with specifically.

Pull up the order in Netsuite and assess the clients concerns and address them yourself. Only involve the sales agent if the below issues arise.

1. Pricing / Order Discrepancy
2. Change To Order
3. Payment Matters
4. Order Cancellation
5. Upset with Production Process

CSOP- B

Getting Free Report Info

Script: "No problem, I can help you with that. What is the name of the report that you are calling about?"

Make sure you note the name of the report they are requesting

Script: "Alright, Let me get you over to a Business Development Manager to get you that information. What is the name of the company you are calling from?"

1. The name of the company, and person calling.

Check in Netsuite if this is the name of a company that is currently in there or new.

- New Clients- Check with Sales Manger/Report to see who gets the next lead, and then transfer
 - o Make sure to enter the lead info into Netsuite
 - o Check the Box that says "Requested Free Report"
- Current Clients- Transfer the request to the correct Business Development Manager (BDM)
 - o Go to the contact and Check the Box that says "Requested Free Report"

Notify the BDM of the Client's Name, Company, and the Free Report the client is requesting.

Transfer the call.

CSOP- C

Client Wants Pricing/Product Information

Script: “No problem, I can help you with that. I’ll get you over to a National Account Manager. What is the correct spelling of your company name”

Step 1- Search the company name in Netsuite Search (Hint: You should be typing this in as they are giving the spelling to you)

- Use the Global search in the top right. Use the “%” sign then type in the word that you think is the least popular. (i.e.- AAA Wholesale Services- Look Up “%Wholesale”) also, you can try to look up the contact as well (Use the same tip as above).

IF the company name or contact **is already in** Netsuite, place the call on park, notify the rep of the name of the person, company and what Park# the client is on.

IF the company name and contact is **NOT** in Netsuite, follow these steps:

Step 1- Create A New Lead

Step 2- Make sure you Enter the phone, email, and contact name in the contact section

Step 3- Ask the client for their association number (i.e. ASI, PPAL, SAGE, etc.) (Enter this on the Lead NOT the Contact.

Step 4- Place the call on Park

Step 5- Review the report to see what agent gets the next lead.

Step 6- Notify the Rep of the name of the person, and company that is on the phone. Also notify them what Park# their call is on.

Policy: IF the BDM assigned to the **New Lead** is not at their desk, on the other line...etc., Immediately re-assign the lead to another agent. The client is to spend as little time on Hold as possible.

Policy: IF the BDM assigned to the current customer is not at their desk, on the other line...etc., Immediately get the customer over to the Sales Manager. The client is to spend as little time on Hold as possible.

CSOP- D

How To Search Netsuite For Current Contacts/Companies

Step 1- Search the company name in Netsuite Search (Hint: You should be typing this in as they are giving the spelling to you)

- Use the Global search in the top right. Use the “%” sign then type in the word that you think is the least popular. (i.e.- AAA Wholesale Services- Look Up “%Wholesale”) also, you can try to look up the contact as well (Use the same tip as above).

U.S. Flash & Technologies - EMP0009 Gerhardt, Gabe (Administrator) | Sign Out | Help

Global Search

This will show If the found data is a contact, customer prospect, or Lead

This Shows What Company, the contact belongs to

Setup	Support	Period
lers)	~	This Month vs Last Mo
	~	This Month vs Last Mo
	~	This Period vs Last Pe
Month	~	This Month vs Last Mo
	~	This Month vs Last Month

Total Found: 1954

Name	Primary Contact	Phone	Email	How Did You Hear About Us?	Association
1 Dav Sions					

If the initial search you do, pulls up too much information- add more words to the search to see if you can get it narrowed down more. Or try by the contacts name.

Policy: This is a very important function to be able to do Properly and Quickly. The calls need to be directed quickly to the correct person without error. Duplicate entries mean that some BDM will not get credit for the work they are going to put it.

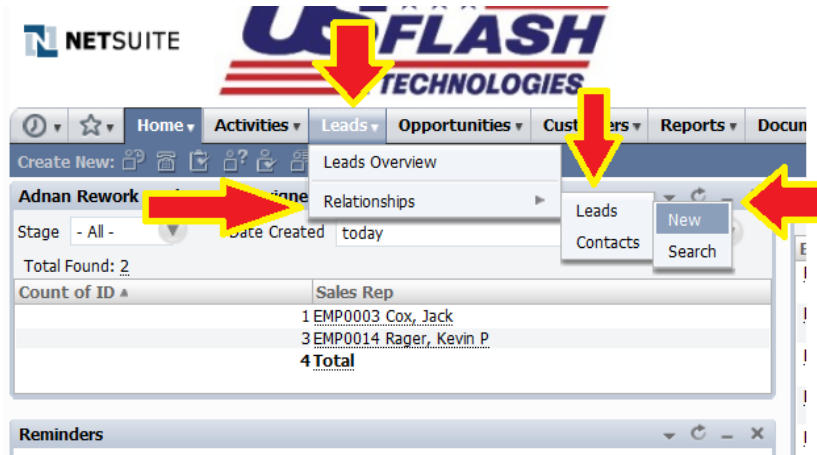
Step 2- IF you do find the name of the company or the person, click on the company/contact to find out which BDM it belongs to. (See screenshot below)

CSOP- E

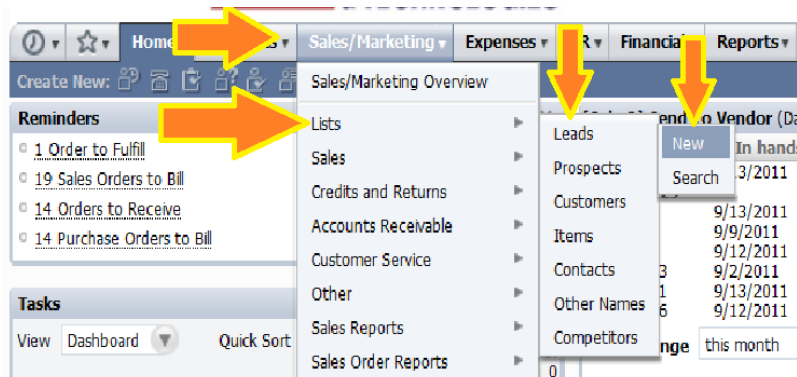
How To Enter New Leads Into Netsuite

Step 1- Click On New Lead

- Account Coordinator- Hover The Cursor Over Leads Tab > Relationships > Leads > New



- Project Manager- Hover The Cursor Over Sales/Marketing Tab > Lists > Leads > New



Step 2- Fill Out The Appropriate Fields and Click Save

Primary Information

* Custom Form: Standard Customer Form

Customer ID: To Be Generated

Type: ☒ Company ☐ Individual

* Company Name:

Parent Company: <Type then tab>

* Status: LEAD-Qualified

Sales Rep: EMP0009 Gerhardt, Gabe

Partner:

Web Address:

Category:

Comments:

Email | Phone | Address

Email:

Phone:

Alt. Phone:

Fax:

Address:

Map

Number of Sales Rep:

Annual Revenue:

Industry:

Products:

How Did You Hear About Us?:

Association:

Association Number:

Membership Approved: ☐

Step 3- Click New Contact and Fill Out Contact info

Relationships Communication Address Sales Marketing Support

Other Relationships

Contacts Subcustomers

New Contact Attach Update Primary Customize View

Contact >> Role

Edit	Company	Job Title	Phone
Edit	Wulff	ACC4225 1-stop marketing	888-440-2966

New Contact

Save Reset Cancel

Primary Information

* Contact Role Mr./Ms... Name Company ACC4225 1-stop marketing Job Title Category Best Buyer Buyer Dream 100 Former Buyer

Email | Phone | Address

Email Main Phone Fax

Historical Invoices

A+ Sage Rating Submitted ☐
5 Star ASI Rating Submitted ☐
Requested Free Report ☐
Scheduled Webinar ☐

If The Client Asks For A Free Report, Please Click This Check Box