SALES PROCESS OVERVIEW

Establishing a consistent approach to lead and prospect follow-up is essential to achieving top sales results. Lasso’s Sales Process feature helps Sales Reps consistently follow up with their prospects by alerting them to sales activities that need to be completed based on certain criteria – online registrations for example. The Sales Process is set up with triggers that automatically notify the reps to perform required activities such as phone calls or emails depending on the trigger type.

Triggers can be based on various items or events within Lasso, including:

- Registration Date
- Registrant Source Type
- Registrant Secondary Source Type
- Registrant Rating
- Registrant History
- Registrant Follow-up Process
- Registrant Becomes Purchaser

The Sales Process set-up can be very simple or complex depending on your needs. Following are two typical examples of how to use the Sales Process feature in Lasso – one is for Online Registrations and the other is for Walk In Registrations. Both examples involve a straightforward set-up of a follow-up email immediately upon registration and then a follow-up phone call a number of days later.

To access Sales Process:

1. Go to the Project Administration Center.
2. Click on Project Setup and select Sales Process.

Note: You must have a Project Administrator Role and the Sales Process Permission to access the Sales Process feature in the Project Administration Center.
To add a new Sales Process:

1. On the Sales Process page, under the Add Process panel on the right, you will see blank fields where you can begin to enter your new Sales Process. If the fields on the right are not blank, click on Add Process on the left side of the page under Sales Process.

SALES PROCESS EXAMPLE #1 – ONLINE REGISTRATION

The following is a standard Sales Process for prospects who register on the project website. With the Source Type of Online Registration as the trigger, two notifications are sent to the assigned Sales Rep – the first to email the new Online Registrant as soon as they register and then another seven days later to follow up with a phone call.

To set up a Sales Process with Online Registration as the trigger:

2. In the Add Sales Process panel, give the Sales Process a Name such as Online Registrations.
3. In the Registrant Status field, select Normal. This field is applicable only if you are using Lasso’s Inventory Center wherein Normal means the Registrant is not associated to a Unit of inventory.
4. In the Trigger Type field, select Registrant Source Type.
5. In the Source field, select Online Registration.
6. Check the On Insert box to activate the trigger on initial registration. Checking the On Update box will activate the trigger if the Source Type is changed to Online Registration.
8. In the **Activity 1** section, leave the **Delay By (days)** field at 0. This will prompt the trigger as soon as someone registers online.

9. In the **Activity Type** field, select **Email**. This will bring up an **Email Template** field.

10. In the **Email Template** field, select the email template that is to be sent.

11. Enter an appropriate description of the follow-up activity in the **Notes** section.

![Activity 1 diagram](image1)

12. Click on **Add Activity** at the top of the **Add Process** panel. This will bring up an **Activity 2** section.

![Add Activity button](image2)

13. In the **Activity 2** section, select or enter 1 in the **Delay By (days)** field.

14. In the **Activity Type** field, select **Phone Call**.

15. Enter an appropriate description of the follow-up activity in the **Notes** section.

![Activity 2 diagram](image3)

16. Click **Save**.
SALES PROCESS EXAMPLE #2 – WALK IN REGISTRATION

Following is a Sales Process for new prospects who walk into the Sale Center. When Walk In is entered as the Source Type, this triggers two notifications to the assigned Sales Rep – the first to email the new Walk In Registrant and then another three days later to follow up with a phone call.

1. In the Add Sales Process panel, give the Sales Process a Name such as Walk In Registrations.
2. In the Registrant Status field, select Normal. The Normal Status means the Registrant is not a Purchaser yet.
3. In the Trigger Type field, select Registrant Source Type.
4. In the Source field, select Walk In.
5. Check the On Insert box to activate the trigger on initial registration. Checking the On Update box will activate the trigger if the Source Type is changed to Walk In.

![Sales Process Image]

7. In the Activity 1 section, leave the Delay By (days) field at 0. This will prompt the trigger as soon as the Registrant is entered with a Source Type of Walk In.
8. In the Activity Type field, select Email. This will bring up an Email Template field.
9. In the Email Template field, select the email template that is to be sent.
10. Enter an appropriate description of the follow-up activity in the Notes section.

![Activity 1 Image]
11. Click on Add Activity at the top of the Add Process panel. This will bring up an Activity 2 section.

12. In the Activity 2 section, select or enter 3 in the Delay By (days) field.
13. In the Activity Type field, select Phone Call.
14. Enter an appropriate description of the follow-up activity in the Notes section.

15. Click Save.

UPDATING THE SALES PROCESS

The Sales Processes that you create will be listed under Sales Process on the left panel of the Sales Process page. You can make changes to the existing Sales Processes as follows:
1. To update a Sales Process, click on it and change the fields on the right under Edit Process as needed.
2. To delete a Sales Process, click on it and then click on Delete Process on the left under Sales Process.
3. To add another sales activity to the Sales Process, click on it and then click on Add Activity on the right under Edit Process.