

Changes to the Contact Record

Goal is to have a clear, distinct definition of our clients and to satisfy requests from the field

OLD STATUSES

New Lead
 Suspect/Prospect
 Call 1
 Call 2
 Call 3
 Call 4
 Call 5
 PFA Sent
 PFA Completed

Consult Scheduled
 Consult Completed
 Working with Zors
 Discovery Day
 Dead Lead
 On Hold
 Sales Completed
 Contact
 Communication Center

NEW CONTACT TYPE	NEW STATUS
Client-Prospect	New
Client-Marketing Qualified Lead	Contact
Client-Sales Opportunity	Initial Consultation
Client-Prior Purchase	Referred to Zors
Family	Discovery Day
Franchisor	Under Agreement
Friend	Closed Won
National Partner	Closed Lost
Referral Partner	

Changes to the Contact Record - Contact Type Definitions

- **Client - Prospect**
 - If the person has unknowingly or involuntarily provided you their contact information, they are a prospect.
- **Client - Marketing Qualified Lead (MQL)**
 - If the person has knowingly and voluntarily provided you their contact information but has not requested or accepted a consultation with you, they are a MQL.
- **Client - Sales Opportunity**
 - If the person has at least accepted or requested an initial consultation with you, they are a Sales Opportunity.
- **Client - Prior Purchase**
 - If the person has purchased a franchise through FranNet and is not currently exploring any other opportunities

Changes to the Contact Record - Statuses

- New Lead
 - **Client Prospect / New**
- Suspect/Prospect
 - **Client Prospect / New**
- Working with Zors
 - **Referred to Zors***
- Discovery Day
 - **Reinstated in SKY**
- Dead Lead
 - **Closed Lost**
 - **Closed Lost Reason and Closed Lost**
Comments are static fields
- Sales Completed
 - **Closed Won***
- Contact
 - **No change**
- **Initial Consultation (New)**
- **Under Agreement (New)**

Changes to the Contact Record - Status or field?

PFA Sent and PFA Completed used to be a status, they are now a field in the record that updates automatically

ADDITIONAL INFORMATION

Referred By :

Buyer Motive :

Veteran :

Education :

Most Recent Employment :

PFA Sent :

PFA Completed :

PFA Sent Date :

Changes to the Contact Record - Status or field?

Consult Scheduled and Consultant Completed used to be a status, it is now one field called Date of Consultation

Address2 : 10302 Brookridge Village Blvd	Call At :
Preferred Mode of Contact :	Home Phone :
Cell :	Spouse Name :
Company : FranNet	Spouse Birthdate :
Spouse Occupation :	Marital Status :
<u>Date of consultation :</u>	Closed Lost Reason :
Closed Lost Comments :	