Note: This document is “view only”. Please create a copy of this document and save it to your drive.

**Master: SOP- OBM Sales- Systems Vault**

**PREREQUISITES**

[Master: URLS (master links)- Systems Vault](https://docs.google.com/spreadsheets/u/0/d/1mlQjpjNMlD4NJVtNFufaUVEE326vNw4TkKrwULAD43U/edit)

[Template: Sales Call Prep: Due-Diligence- Systems Vault](https://docs.google.com/document/u/1/d/1JB30jHRz47SOThzUFkENpR2P_BCRmXFqs-KPlodkQMA/edit)

[Template: Client Intake- Systems Vault](https://docs.google.com/forms/d/1O7BbS9TXXmrl9yLthC0ays3bcK-M60xZRuSS7OzXB2U/edit)

[Template: Sales Call Emails: Confirmation, Reminder and Agenda- Systems Vault](https://docs.google.com/document/d/1IzaVAQCOuSKos0TA50tCnvUiEaoW4TzmJUTfUcgbLoE/edit?usp=sharing)

[Template: Sales Call Emails: Invite and Nurture Series- Systems Vault](https://docs.google.com/document/d/10piM-hOXRPTDhr0ZAy4l1HNWpc-OUf02Y-it_8rfVIA/edit?usp=sharing)

[Template: Sales Script, Leading the Call- Systems Vault](https://docs.google.com/document/d/1sWETeBFYq4CKigVSz-t_q3IpmsHJ-ZZu2C9KSzSf784/edit?usp=sharing)

[Template: Proposal and Follow-up Series- Systems Vault](https://docs.google.com/document/d/1cCaP94TiH02prMx7obxVcVcCZRUCIUtWB0ZmZOI3rc8/edit?usp=sharing)

[Template: Sales Call Prep-Sheet- Systems Vault](https://docs.google.com/document/d/1n3x_Db18eKSjo2BaujYzLMB9ilLeJHI8-voCZCEmgLo/edit)

Call Scheduler Link

Welcome Pack Example: [Sarahnoked.com/welcome](http://www.sarahnoked.com/welcome)

**PURPOSE**

To conduct sales conversations confidently.

**POLICY**

All potential clients must fill out an intake questionnaire.

Clients are screened before being invited to a call.

**PARTY**Online Business Manager

**PROPERTY**

Online Business Manager

**PROCESS**

Part 1: Screen Candidate

Part 2: Due Diligence

Part 3: Conduct Sales Conversation

Part 4: Follow up

**PROCEDURE**

**Part 1: Screen Candidate**

1. Review Submitted Questionnaire
2. Tag as “Approved”, “Waitlist” or “Rejected” and follow up with [Template: Sales Call Emails: Invite and Nurture Series- Systems Vault](https://docs.google.com/document/d/10piM-hOXRPTDhr0ZAy4l1HNWpc-OUf02Y-it_8rfVIA/edit?usp=sharing)

**Part 2: Due Diligence**

1. Conduct prep and due diligence using: [Supporting Docs: Sales Call Prep: Due-Diligence- Systems Vault](https://docs.google.com/document/u/1/d/1JB30jHRz47SOThzUFkENpR2P_BCRmXFqs-KPlodkQMA/edit)

**Part 3: Conduct Sales Conversation**

1. Conduct sales conversation using: [Template: Sales Script, Leading the Call- Systems Vault](https://docs.google.com/document/d/1sWETeBFYq4CKigVSz-t_q3IpmsHJ-ZZu2C9KSzSf784/edit?usp=sharing)

**Part 4: Follow up**

1. Follow up using: [Template: Proposal and Follow-up Series- Systems Vault](https://docs.google.com/document/d/1cCaP94TiH02prMx7obxVcVcCZRUCIUtWB0ZmZOI3rc8/edit?usp=sharing)

**Created by:**

**Department:** Sales & Products

**Date:**

**Revised:**

**Revised by:**