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MANUAL OF POLICY AND PROCEDURE

**SUPPLEMENT
CLIENT RELATIONS DIVISION**

**REVISED
12/2022**

INTRODUCTION

This supplement to the manual of policy and procedure is presented as a matter of information and has been prepared to inform employees assigned to the client relations division about specific practices and policies, as well as the conduct expected from them. While this manual is not intended to be a book of rules and regulations or a contract, it does include some important guidelines which employees assigned to the investigation division should know. Except for the at-will employment provisions, the manual can be amended at any time.

This supplement to the manual of manual of policy and procedure will not answer every question employees may have, nor would the Agency want to restrict the normal question and answer interchange among us. It is in our person-to-person conversations that we can better know each other, express our views, and work together in a harmonious relationship.

No one other than authorized management may alter or modify any of the policies in this supplement. No statement or promise by a supervisor, manager, or designee is to be interpreted as a change in policy, nor will it constitute an agreement with an employee.

Should any provision in this supplement be found to be unenforceable and invalid, such a finding does not invalidate the entire supplement, but only the subject provision. Nothing in this supplement is intended to infringe upon employee rights under Section 7 of the National Labor Relations Act (NLRA) or be incompatible with the NLRA.

We ask that employees assigned to the client relations division read this guide carefully, become familiar with the Agency and our policies, and refer to it whenever questions arise.

LEAD MANAGEMENT

The Agency uses an online CRM to track leads, prospects, and marketing outreach efforts. This system can be accessed online or through mobile devices. Access to set up your username and password will be sent to your Agency email address. If you have not been granted access, please contact your supervisor for further details.

Access <https://app.nutshell.com/dashboard>
Support <https://www.nutshell.com/customer-support>

Overview

Nutshell will be your main portal to access leads, conduct email outreach, and log any new activities conducted on a prospective client. You will find most of our prospective clients are individuals who work for an organization such as a law firm, insurance company, or private company.

Dashboard

The dashboard allows you to reference your sales metrics by month, and lead summary by week. The sidebar in the dashboard gives you an overview of any activities you have scheduled for today or for future dates, any task you have scheduled, and a timeline of any past activity you have performed.

Logging Activities

It's extremely important to log all new activities (phone calls, emails, voicemails) performed on a prospect to have a point of reference for future contact. The more detail you can provide on what transpired during the conversation, the better it will be to reference if you need to reach out again.

Marketing

Under the "Marketing" tab on the left-hand sidebar, you can access the available tools to advertise our investigative services on a wide scale.

Broadcasts

The broadcasts are all the email marketing emails curated to be sent out to match the specialties of the audience.

Audiences

Audiences are the prospective clients split into categories based on their organization's specialty such as Criminal, DUI, Civil, Family, Corporate, SIU, Worker's Compensation.

Drip Sequences

Drip sequences are automatic messages that you can activate to send out a series of marketing broadcasts to the particular audience attached to the sequence. You can automate the days in which you would like to send each email sequence.

Monitoring Drip Sequence Performance

You can check the open and click rates on each individual broadcast to determine which emails perform better. If you click on the particular drip sequence recipients, Nutshell has a 5-star engagement rating scale. If there are individuals with high engagements numbers, it is a good idea to reach out to them to continue marketing efforts via phone or individualized emails. Also, it's always recommended that, before you reach out to a prospect, you review their company's website and get to know what work they do.

CALL SCRIPTS

Criminal/DUI

Hello, [FIRST NAME] please. **Note: Sound confident. Make it sound like you already have a scheduled appointment with this person.*

**Wait to be transferred to that individual* [See Gatekeeper Scripts, if necessary]*

If that person is already speaking, then:

Hi [FIRST NAME].

This is [PROVIDE YOUR NAME] with Origin Investigations. How are you?

Pause and wait for their answer

That's good to hear. The reason for my call is that we currently work with similar firms who concentrate on criminal law cases, and we have been particularly successful in providing them with comprehensive investigative services such as conducting witness interviews, locating new evidence, and backgrounds research needed to boost their defense strategies.

Our team would love to get to know your firm better and the challenges you encounter so we can determine how we supplement your team and provide favorable results to your clients. Does [TIME] on [DAY OF WEEK] work for you?

See Objections Scripts, if necessary

Civil

Hello, [FIRST NAME] please. **Note: Sound confident. Make it sound like you already have a scheduled appointment with this person.*

**Wait to be transferred to that individual* [See Gatekeeper Scripts, if necessary].*

If that person is already speaking, then:

Hi [FIRST NAME].

This is [PROVIDE YOUR NAME] with Origin Investigations. How are you?

Pause and wait for their answer

That's good to hear. The reason for my call is that we currently work with similar firms who concentrate on civil law cases, and we have been particularly successful in providing them with comprehensive investigative services such as witness locates, asset searches, and uncovering new evidence to provide advantageous litigation support.

Our team would love to get to know your firm better and the challenges you encounter so we can determine how we supplement your team and provide favorable results to your clients. Does [TIME] on [DAY OF WEEK] work for you?

See Objections Scripts, if necessary

Family

Hello, [FIRST NAME] please. **Note: Sound confident. Make it sound like you already have a scheduled appointment with this person.*

**Wait to be transferred to that individual* [See Gatekeeper Scripts, if necessary].*

If that person is already speaking, then:

Hi [FIRST NAME].

This is [PROVIDE YOUR NAME] with Origin Investigations. How are you?

Pause and wait for their answer

That's good to hear. The reason for my call is that we currently work with similar firms who concentrate on family law cases, and we have been particularly successful in providing them with comprehensive investigative services such as locating subjects for process service, hidden asset searches, and discreet surveillance needed to win the case.

Our team would love to get to know your firm better and the challenges you encounter so we can determine how we supplement your team and provide favorable results to your clients. Does [TIME] on [DAY OF WEEK] work for you?

See Objections Scripts, if necessary

SIU (Insurance)

Hello, [FIRST NAME] please. **Note: Sound confident. Make it sound like you already have a scheduled appointment with this person.*

**Wait to be transferred to that individual* [See Gatekeeper Scripts, if necessary].*

If that person is already speaking, then:

Hi [FIRST NAME].

This is [PROVIDE YOUR NAME] with Origin Investigations. How are you?

Pause and wait for their answer

That's good to hear. The reason for my call is that we currently work with various insurance SIU departments, and we have been particularly successful in providing them with comprehensive investigative services such as background checks on involved parties, loss location canvass, recorded statements, accident reconstruction, and claim withdrawals.

Our team would love to get to know your organization better and the challenges you encounter so we can determine how we supplement your investigative team to mitigate claims. Does [TIME] on [DAY OF WEEK] work for you?

See Objections Scripts, if necessary

OBJECTION SCENARIOS / RESPONSES

1. *"I am not interested."*

Response: "That is exactly what a lot of our long-term clients said the first time I called. Most people say they aren't interested before they see how much we can help improve efficiency on their investigations and impact their case results while being conscious of their budget."

We should really get together to discuss further. Does [TIME] on [DAY OF WEEK] work for you?"

2. *"I'm too busy."*

Response: I figured you would be busy. I wanted to find a better time that suits your schedule. Does [TIME] on [DAY OF WEEK] work better for you? We also can do a late evening or early morning meeting.

3. *"We're good" "We're all set" "We already have someone."*

Response: "That's great news. If you are achieving the results you are looking for, then there is no reason to think about changing."

However, my goal is to set some time to chat and get to know you and your company better. And even if it doesn't make sense to do business with us, at least we can give you a competitive quote to make sure your current investigators are providing you with their best rates.

We should really get together to discuss further. Does [TIME] on [DAY OF WEEK] work for you?"

4. *"We are not using investigators at this time."*

Response: "I completely understand. A lot of our clients we work with now had no idea the wide range of services a private investigator can offer to enhance their desired results."

It's important to assess your current business standards and see if there could be improvements while also being conscious of your bottom line.

We should really get together to discuss further. Does [TIME] on [DAY OF WEEK] work for you?"

5. *"Can you send me some information?"*

Response: "Absolutely. Can you tell me specifically what you are looking for?"

The reason I ask is that there is so much information to send that it often creates more questions as a result. Why don't I set up a quick meeting with our lead investigator so they can present you with information and data about our company?"

If All Else Fails

"I'll tell you what, if after 15 minutes you don't see a fit, that's okay. We can virtually shake hands, thank you for your time, and part ways. At least at that point you would know more about our services and I would know more about your organization. Maybe someday down the line we can work together."

When do you have 15 minutes to spare?"

GATEKEEPER (AKA Receptionist/Administrative Assistant for Decision Maker)

1. Ask for decision maker.
 - a. “[DECISION MAKER’S NAME], please,”
2. Typically , they will ask you for your name, company, and what is your call regarding?
 - a. Act like you are supposed to be talking to them. Believe it!
 - b. “This is [YOUR NAME] with Origin, and it’s regarding an appointment.”
3. If they send you to their voicemail, DO NOT LEAVE A VOICEMAIL (not on the first few tries)
 - a. If you leave a voicemail, they will likely screen your calls and never answer moving forward.
4. If you get to their voicemail, dial zero or call back so you can be redirected to the receptionist.
5. Ask receptionist “Is [DECISION MAKER’S NAME] in today?”
 - a. If they are “not sure” ask: “Do you see him/ her?”, “Can you find him/her?”
 - i. “Is there anyone in the office near him/her that knows?”
 - ii. “Could you page him/her or transfer me to their cell phone?”
 1. You don’t need their personal cell. The goal is to be transferred.
 - b. If they are not in the office, ask for a second DECISION MAKER.
 - i. Go to their website or use Nutshell to identify a second P.O.C
6. If you aren’t able to get through, at least use this time to get gatekeeper to verify information on Nutshell and update the information.
 - a. What is [decision maker]’s direct number?
 - b. Verify their name.
 - c. Verify their email.
 - d. Get the Gatekeeper’s name.
 - e. Make friends with Gatekeeper. Small talk. Better your chances of successfully getting through in the future.

ADDITIONAL TIPS

- Call during off-hours (earlier than 8 and after 5pm).
- Try emailing them to set up an appointment.
- If you have their call phone number, text them.
- Try connecting on Linked-In.
- Try a different department to get you through.
 - Call their sales department. They might just blindly transfer you over.
- Voicemails
 - Fight going to their voicemail!
 - This is a last resort after trying to speak with them 4-5 times.
 - Leave a simple and vague voicemail.
 - Speaks slowly and clearly.

MANUAL OF POLICY AND PROCEDURE ACKNOWLEDGEMENT

I acknowledge receipt of the Origin Investigations, Inc. Manual of Policy and Procedure (Supplement – Client Relations Division) and agree to follow the guidelines within it. I also acknowledge the following:

- Receipt of this manual supplement does not create a contract of employment or in any way alter my at-will employment status; the Agency or I can end the employment relationship at any time, with or without notice, and with or without cause.
- I am not entitled to any particular sequence of disciplinary measures prior to termination.
- With the exception of the at-will employment policy, this manual may be modified at any time.
- Violation of any policy in this manual, or any policy included as an addendum, may be grounds for discipline, up to and including termination.
- This manual does not include every process, policy, and expectation applicable to employees, or my position specifically; I may be counseled, disciplined, or terminated for poor behavior or performance even if the behavior or performance issue is not addressed in the manual.
- Should any provision in this manual be in conflict with federal, state, or local law, that provision only will be considered ineffective, while the rest of the manual remains effective.
- If I have questions regarding any policy in this manual, or other expectations related to my behavior or performance, it is my responsibility to speak with Jayden Brant.

EMPLOYEE

Signature

Date

Name