



LEAD GEN SOP

The Sales team makes use of the Lead Management sheet to record and monitor leads originating from various channels. Three sheets, namely 'Website', 'WordPress' and 'Design Sentry', will automatically update as new leads are received whereas the sheet 'Other' needs to be filled manually for leads received through any other channel. Subsequently, all team members will promptly receive an update email informing them of the newly acquired leads.

You may receive leads from any of the below sources:

- ❖ Physique 57 India Website
- ❖ Social Media DM's
- ❖ Yellow Messenger/ WhatsApp
- ❖ WordPress Enquiry Form
- ❖ Walkin/Direct Contact
- ❖ Client Referral
- ❖ Staff Referral
- ❖ Hosted Classes
- ❖ Marketing Events/Outdoor events

Upon receiving new leads from any source, the following timeline for touchpoints should be adhered to:

1. TOUCHPOINT 1: WITHIN 2 DAYS (D+2)

- a. All newly received inquiries/leads must be contacted within 2 hours of their reception.
- b. Mode of Contact: An introductory message sent via WhatsApp.
- c. The purpose of this first contact is to understand the client's requirements, extend a warm welcome, and schedule a convenient time for a brief phone call to arrange a trial session.
- d. If, for any reason, sending a WhatsApp message is not possible, communication should be made through a phone call or another appropriate medium, but reaching out within 2 hours is crucial.

- e. This first contact must be immediately followed by sending the schedule and fee structure along with the relevant template.

2. TOUCHPOINT 2: WITHIN 48 HOURS (D+48)

- a. If the client has not signed up for a trial by this point, proceed to Touchpoint #2.
- b. The second touchpoint should be completed within the first 48 hours after receiving the lead.
- c. Mode of Contact: Phone call.
- d. Purpose: To assist the client in signing up for a trial class, address any questions or queries, and establish rapport.
- e. Depending on the flow of the conversation, this contact can be followed up with sending the waiver link or trial confirmation.

3. TOUCHPOINT 3: WITHIN 7 DAYS (D+168)


- a. If, for any reason, the client has not signed up for a class or remains uncertain about the method, proceed with the third touchpoint around the 7-day mark.
- b. Mode of Contact: Phone call/WhatsApp message.
- c. Purpose: Handling objections, addressing common misconceptions or reservations, and explaining the various benefits of the method.
- d. Depending on the client's specific reservations, it may be beneficial to follow up with relevant collateral. For example, if the client is unsure due to a pre-existing injury, sending an article on the safety aspects of the workout or client testimonials can help build trust and make the client feel more comfortable.

4. TOUCHPOINT 4: WITHIN 2 WEEKS (D+14)

- a. This represents the final stage of the client journey unless the client signs up for a trial class.
- b. This touchpoint must be completed on or before the 14-day mark from the date the lead initially reached out to us.
- c. Purpose: Addressing any remaining objections and encouraging the client to arrive at a decision

It is imperative that the Lead Management sheet is kept up to date at all times. Capturing and recording accurate and actionable information on them will help us take informed and corrective actions, which in turn will enhance client experience & conversions.

The comments from each of these touchpoints must be recorded in their respective Follow up columns and must be concise in nature. The objective of this sheet is to closely monitor and enhance the



experience of potential members & identify the reasons for those who decide not to join us.

SO, WHAT ARE ACTIONABLE INSIGHTS?

For instance, if the lead you have reached out to enquires for a trial, is excited on receiving a call from you, asks for the rate card and schedule but then suddenly becomes unresponsive.

Actionable Insights in this case would be:

- Excited to try a class.
- Shared the schedule & rate card on 01-Aug.
- Unresponsive to outreach calls/messages ever since.
- Most probable reason: Found pricing too steep.
- Will continue with the remaining touchpoints, hoping to turn it around.

Try keeping the comments brief, concise & insightful. Gaining insights will only be possible if you do ask probing questions and interact with them beyond a standard template. Rapport building goes a long way and often holds the key to optimising conversions & retentions.