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Lead Scope Guidelines for Area Expansion's Language Teams

I. Purpose and Objectives

Upsales & Area Expansion (AE) as a key sales player in the company supports its strategic growth in expanding its market while maintaining to deliver the world's best customer experience.

This document aims to outline the lead scope guideline and ownership between the newly formed Mexico (Spanish) Team and the legacy Philippines (English) Team in AE.

II. Lead Scope Guidelines

To deliver a positive customer experience is to ensure cohesion on the promises and expectations set with the customers.

As front-end sales teams are now selling in Spanish or that a bilingual customer after being surveyed in Welcome Call would prefer to be spoken in Spanish, it is the responsibility of all teams in Customer Success to provide correct follow through. Thus the following guidelines:

1. All accounts that specified language preference (as stated in the Business Information field in CRM) should be handled by the appropriate team (Mexico Team for Spanish and Philippine Team for English).
2. For accounts with no information on Language and/or preference, the scope will be based on the language used by the front-end sales team.
 - a. Accounts sold prior to 2019 are presumed to be in English.
 - b. Another way to determine the language is to check the site/location assignment of the front-end sales closer in CRM. (or Team Lead to listen to the sales call to validate)
 - c. If there's no information in the Business Information field but there's a CRM popup message that instructs team members to communicate with the customer in Spanish then this should be handled by Mexico Team.
3. The Mexico AE team will be the primary AE team supporting the Customer Care Mexico team unless the customer has indicated that English as his/her preferred language, in which case, these will be transferred over to the Philippine AE team.



III. Ownership

Ownership of the leads will be based on the existing [SOP Upsales & Area Expansion Processes \(Sales Pipeline\)](#) under *IV. Lead Ownership and Management*.

1. All pre-existing ownership will be retained until its expiration. Then language scope guidelines should take effect immediately.
2. All disputes should be mediated and resolved by the head of Area Expansion.