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Approved by:

Department: 411 Locals Customer Success

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## CPT to AE Referral Project

### I. Purpose and Objectives

- A. Create a new working channel for generating Referral Leads
- B. Get Referral Deals from this new channel
- C. Generate more leads for Additional Services
- D. Close more Additional Services Deals out of the generated lead

Increase upsell revenue: By training call answering agents to identify upsell opportunities and pass them along to the upsell team, the company can increase its upsell revenue.

Improve customer satisfaction: By providing personalized and relevant upsell offers to customers, the company can demonstrate its commitment to meeting their needs and improving their experience.

Increase customer retention: By offering customers additional products or services that meet their needs, the company can increase their likelihood of remaining loyal and continuing to do business with the company.

Streamline the sales process: By integrating call answering and upselling processes, the company can create a more efficient and effective sales process that results in increased sales and revenue.

Enhance cross-selling opportunities: By identifying customers' needs and preferences during call answering, the upsell team can offer complementary products or services that meet those needs and increase cross-selling opportunities.

Create a unified customer experience: By providing a seamless and integrated experience across all touchpoints, the company can create a strong and consistent brand image that resonates with customers and encourages them to do business with the company.

### II. Process

- A. Send leads to Area Expansion if business owners meet the criteria set by the team.
  - 1. If the account already received 4 CPT leads since signing up, this account will become a HOT lead.
  - 2. 15 minutes after sending a potential client to the BO, CPT will call the BO back to offer additional services that can improve their marketing campaign. **"Our business development manager would like to discuss with you your marketing campaign and on how to further improve your online business presence, I'll go ahead and transfer you now"**.
  - 3. If the business owner agrees, CPT will send them over to AE.

- B. [Track](#) all potential leads and provide the outcome base on the agreement with BO or the status of the account

Outcome	Description
Yes - Transferred to AE	Upsell was offered and BO agreed to be transferred to AE.  <b>Note:</b> -CPT to chase after the BO if requested for call back with in the day
Yes - Not Interested	Upsell was offered but BO was not interested.  <b>Note:</b> -If BO declined, CPT can offer again after 30 days
Yes - Requested to cancel	Upsell was offered but BO requested to cancel.  <b>Note:</b> -CPT should transfer and create a ticket to RET .
No - Do not upsell pop-up	Upsell was not offered because a “ Do NOT Upsell” pop-up was placed on the account
No - CDTNP/Canceled	Upsell was not offered because the account was canceled.
No - Under RET/ESC/HTS	Upsell was not offered because the account is currently being handled by RET/ESC/HTS
No - Pending balance	Upsell was not offered because the account has a pending balance
No - Not qualified	Upsell was not offered because BO did not meet the criteria
No - Already offered	Upsell was not offered because the account has an outstanding upsell card or BO declined the offer  <b>Note:</b> -If there’s an existing Upsell Card - CPT can offer again 30 days after the upsell card was closed.
No - Did not answer/ Requested for CB	Upsell was not offered because the BO didn’t answer or wasn’t available.  <b>Note:</b> -If BO did not answer within the day, CPT can still call the next day
No - Did not offer	Behavior issue

### III. Participants

A. Customer Protection

1. Simon Vale
2. Lee Gomez
3. Mars Peters
4. Maria Lopez
5. Loueis Castro
6. Ed Grant
7. Mary Thompson

B. Area Expansion

1. Matthew Benton
2. Calvin Myers
3. Yamil Cabrera