FantaCo Sales Operations Manual

This FantaCo Sales Operations Manual outlines the policies and procedures governing all sales activities, ensuring ethical conduct, operational efficiency, and consistent performance across the sales organization. This is a living document and will be updated quarterly by Sales Leadership in collaboration with Legal and Finance.

1. Sales Code of Conduct

Purpose: To ensure ethical, legal, and professional conduct across all sales activities.

- Do not make **false or misleading claims** about products or services.
- **Protect confidential client and company data**.
- Refrain from offering or accepting **bribes, gifts over $100, or other unethical incentives**.
- Adhere to all **anti-corruption and anti-competition laws**.

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2. Territory Management Policy

Purpose: To provide clear guidelines on account and territory ownership.

- Sales representatives are assigned specific **territories and account lists**.
- Selling outside of an assigned territory requires **approval from the Sales Director**.
- All changes must be **logged in CRM** and communicated to affected representatives.

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3. Lead Handling and Assignment Policy

Purpose: To maximize lead conversion by streamlining lead distribution and follow-up.

- Leads are assigned based on **geography, industry, or company size**.
- **Inbound leads must be contacted within 1 business day**.
- Leads inactive for **14 days** will be returned to the lead pool.

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4. Discounting and Deal Approval Policy

Purpose: To maintain pricing discipline and protect margins.

All discounts must be recorded with justification in CRM.

Discount Range	Approval Level
Up to 10%	Sales Representative
11–20%	Sales Manager
21–30%	Sales Director
> 30%	VP of Sales + Finance Department

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5. Quota & Compensation Policy

Purpose: To drive performance through transparent compensation structures.

- **Quotas are set quarterly** and reviewed mid-year.
- **Commission is paid monthly based on collected revenue**.
- Special incentives (SPIFFs) must be **approved and published by Sales Operations**.

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6. CRM Usage Policy

Purpose: To maintain data integrity and support forecasting.

- **Opportunities must be logged within 48 hours**.
- **Stages, close dates, and expected values must be accurate**.
- All client communication and meeting notes must be **updated weekly**.

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7. Customer Communication Standards

Purpose: To promote brand consistency and professionalism.

- Use **approved messaging templates** for emails and presentations.
- Follow **brand guidelines** for all external-facing materials.
- Avoid committing to pricing or delivery without **prior approval**.

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8. Travel & Expense Policy (Sales-Specific)

Purpose: To manage and control reimbursable expenses.

- **Coach class** for domestic flights under 5 hours.
- Use **corporate-preferred hotels** when available.
- Submit expenses with **receipts within 10 days of travel**.

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9. Sales Escalation Procedure

Purpose: To address high-risk, high-value, or complex deals appropriately.

- **Escalate any deals >$500,000 to Legal and Finance**.
- Flag **customer red flags** (e.g., insolvency, compliance risks).
- Involve **Sales Engineering for technical scope clarification**.

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10. Performance Reviews & Compliance

Purpose: To monitor performance and reinforce policy compliance.

- Representatives are **reviewed quarterly** on quota attainment, pipeline health, and CRM hygiene.
- **Policy violations** may result in coaching, retraining, or formal discipline.

This manual provides the framework for successful and compliant sales operations at FantaCo. Adherence to these policies is crucial for individual and collective success.