

PTL 4.0 Gather Contact Data Details

Objective

Build contact information, and build relationship with this contact, convincing them we are the best choice.

Procedure

1. Review the 4.0 checklist, have sample dialog and an agenda determined before calling the contact.
2. Call the Contact. Gather contact data, and offer to send pertinent marketing materials
3. Be sure to ask about any upcoming projects or any future need for cast or cut stone.
4. Assess the contact and the potential for projects coming from this contact.
5. End conversation with a proactive offer of service.

Key Points

- Call your Contact and get to know them. Establish a Relationship.
- Find out what the contact is interested in, and what projects that have upcoming.
Help the contact to know how we can help him with his projects
- Set up a project ID at the earliest possible point.
- Examine the contact and all relevant info, and determine the likeliness of getting a project from them.



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You learn more about someone over repeated contact when building the relationship beyond your initial meeting. Always be prepared to capture contact details in the database, and ask innocent questions to uncover deeper personal information. Giving some of your own personal information can lead them to offer theirs.

Frameworks of information need to be established and populated for all contacts. The better the framework, the more likely we understand the customer's viewpoint and his needs. This also helps us when assigning company personnel and resources to the project.

PTL Outline

PTL 2: Select Prospects & Match to Campaign

PTL 3: Convert Lead to Contact

- PTL 3.1 Routing Stage
- PTL 3.2 ID Requirements (or Prequalify Contact/Evaluation)
- PTL 3.3 Set Agenda

PTL 4: Gather Contact Data Details

- PTL 4.1 Contact Communications
 - PTL 4.1.1 Phone Call
 - PTL 4.1.2 Send Marketing Material
 - PTL 4.1.3 Request Information
- PTL 4.2 Contact Follow-Up
 - PTL 4.2.1 Phone Call Follow-Up
 - PTL 4.2.2 Marketing Material Follow-Up
- PTL 4.3 Build Details
- PTL 4.4 Pre-Associate ID
- PTL 4.5 Contact Potential

PTL 5: Qualify Project Contacts

- PTL 5.1 Assign Project Champions (Installers and Other Personnel)
- PTL 5.2 Assign Primary Agents (Decision Makers)
- PTL 5.3 Pre-Qualify Project

PTL 6: Evaluate Project

