

Project Timeline

The project timeline is a graphic that shows how all the elements of a project line up.

(PTL actually means Project Time Line, PTL Timeline is actually redundant.)

The PTL timeline starts before there is any personal contact with a prospective customer, and ends after a project is completed, while a salesman is wrapping up the relationship with this customer, and recycling the contact back into the PTL.

If there is some possibility of further purchases of cast stone from this person, they are returned to PTL 4.0. You can set up a task in StoneWorks for some appropriate time in the future when this contact may have an interest in purchasing more cast stone.

If there is no real chance of repeat business, you can make some closing actions, such as asking for photos or a testimonial, or sending an appreciation of some sort. You can set a task to contact them months down the road and ask about their satisfaction with their stone. This would probably be the last contact for a one-time purchase customer.

