ASR Training Guide

Marketing process training guide for Fiberlink ASRs and SMB team members

Dear Team Member,

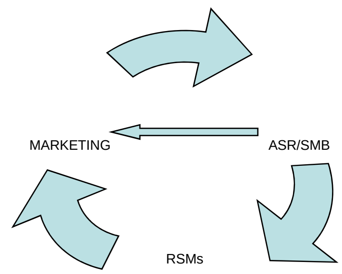
Welcome to Fiberlink! You have joined an excellent team that is supported by the marketing department.

Your team is the first to contact leads, provided by marketing, and provide them with knowledge of our company and our solutions.

For this reason, we have created this guide. It explains the lead process in details from marketing to your team to the RSMs.

It is important to follow all the steps in this guide because of the lead nurturing and lead reporting process that sales and marketing implement. The more updates and feedback we receive the higher quality of leads that we can provide.

Lead Cycle



- Marketing generates leads from various activities (events, online media, virtual tradeshows)
- Marketing creates campaigns then assigns leads to ASR and SMB team
- Marketing sends information about campaigns to the team
- ASR follows up on leads
- ASR updates lead information in salesforce
- When applicable, ASR assigns leads to RSM

Updating Leads

- Refer to following slide for Marketing's expectations for updating leads
- There are four different lead rankings that ASRs should use, ONLY use the following four, despite other options available.
  - Refer to the Lead Ranking slide for definitions
- It is the ASR's responsibility to update the lead status.
  - Marketing uses these lead statuses for reporting so this is extremely important
  - Please refer to the lead status definitions and usage slides
- Campaigns
  - ASRs should ONLY add a lead to the 2009 Fiberlink ASR campaign when an appointment has been made
- Logging an Activity
  - This part of the process is provided by the ASR team manager, all of the above information are Marketing's expectations.

Marketing Lead Updates Expectations

Marketing expects the following updates on leads to be noted in salesforce from the ASR/SMB team

- Add any further information that is given to you by the lead to the lead comment section in salesforce. Date and initial all comments.
- DO NOT remove the leads from their original campaign.
- DO NOT change the original lead source of any lead.
- Always update the lead status.
- Always update the lead ranking.
- Only clone a lead if you are given the direct contact information.
  - Always make sure the email address is correct
- Do not recreate an email based on the email format at the same company due to CAN SPAM laws.
- When you clone a lead make sure you add it to a campaign.
  - Unless it is ASR generated (please follow instructions in the following slides for ASR Generated leads)
- We expect you to keep the lead data as updated and as clean as possible.
- The campaign survey MUST be completed a week after receipt of survey.

Lead Status

Each lead status and what they mean

- New Lead
  - This lead has not been opened or contacted by anyone
- ASR Active Calling
  - This lead is actively being called on by an ASR team member
- SMB working
  - This lead is being actively called on by an SMB team member
- RSM Meeting
  - A meeting has been set by an ASR or SMB team member for an RSM (the lead owner should be which ever RSM the meeting is for, and there should be an activity logged for the RSM)
- Call Back
  - The ASR/SMB Team member has made an attempt at calling this lead, and should return to it after other leads have been exhausted
- Do Not Call
  - The lead has asked not to be contacted by Fiberlink
  - When this status is picked, the ASR/SMB team member should contact marketing to opt out this lead from receiving emails.

Lead Ranking

Assign a lead ranking to every lead you contact

Note: Use the following five rankings despite other available options

- A: Good Contact, Good Company

Good lead -Lead information is correct could possibly turn into an appointment

- B: Suspect Contact, Good Company

Good lead - lead information is correct but not the right person to talk to. Could pass you on to the right person and possibly turn into an appointment.

- C: Bad Data

Bad Lead – The information is incorrect and there is no way to contact the lead, find the right information or be referred to another lead.

- D: Could not reach

Information is correct but unable to reach this lead after multiple tries. Return to this lead at a later date.

- L: Left Company

No longer works for company – will try to get new contact’s information

Transfer of Lead Ownership

- Transfer a lead to the RSM when an appointment has been made
- Transfer a lead to Meghan Carney when the lead has a ranking of bad data
- If an appointment is made for the RSM make sure you add the lead to the ASR/SMB campaign in SF.
  - Only add the lead to these campaign when you have made an appointment
  - Fiberlink ASR Team (for ASRs only)
  - SMB Program: ASR Team (for SMB team only)
- All ASRs must complete the campaign survey provided by marketing. Incentives will be put in place for the whole team once the surveys are complete.

When referred to a new Lead

- Occasionally, when Marketing provides you with a lead, that person will not be the right person to call. *(ex. They might be in marketing, when you are looking for someone in IT)*
- When this happens, try to get the information on the right person to talk to for our solution.
- When the original lead refers you to the correct person to call, this is when you will need to create a new lead in Salesforce.com
  - Note: before doing this, search the new leads name to make sure they are not already in our database
- Please follow the instructions for creating a new lead on the next few pages.

Creating a New Lead

(referred by Another Lead)
Campaign

- If you call a lead and they refer you to another person, MAKE SURE to add the new lead to the campaign that the OLD lead came from
  - First create a new lead
  - Update all necessary fields (see expectations for updating a lead)
  - Make sure to add this new lead to the SAME marketing campaign that the old lead came from
    (e.g John Smith came from a tech target campaign he refers you to Jane Lee. Both should be added as members of the tech target campaign)

Creating a new lead

(when referred by another lead)
Lead Source

- Keep the lead source the SAME as the original lead you contacted

(e.g John Smith and Jane Lee should have the same lead source)

- DO NOT make the lead source ASR Generated

Creating a new lead

Lead Status

- As soon as you call a lead, the status should be changed to ASR Active calling.
  - If you are part of the SMB team, change the lead status to SMB Working
- Please note that status can change during your calls and follow-ups
- Once an appointment has been set change the status to RSM Meeting.
  - If you are part of the SMB team, change the lead status to SMB Demo
- Change the lead owner to the RSM whom you made the appointment for (use RSM region guide to help you)

ASR Generated leads

- Occasionally an ASR will generate their own lead which was not a part of a Marketing initiative
  - ASR generates leads from previous contacts, LinkedIn, etc..
- When this happens, the ASR can put the lead into Salesforce.com, however you MUST do the following:
  - Create the lead
  - Lead Source: ASR Generated
  - Lead Status- ASR Active Calling
  - Lead Ranking (this depends on the ranking the ASR will give the lead
- Email:
  - These types of leads are NOT to be contacted by email unless permission is given
  - When the lead source ASR generated is given to a lead, that lead will automatically be opted out of email
  - When one of these leads is created, email Josephine and Meghan letting them know the name, company, and source of the lead (i.e. if the ASR had the contact from a previous job, or if they got the lead from Linked in)

ASR Generated Leads

- Campaigns
  - These leads should NOT be attached to a campaign
  - Do NOT put them in the ASR campaign unless an appointment has been made by an RSM

- Note: Because of CAN SPAM laws, these previous steps are VERY important to follow.
- Email address cannot be generated based on the ASR knowing the format of a person at the same company
  - EX: John Smith is a lead in SFDC, and his company formats their emails: jsmith@fiberlink.com. If the ASR knows Jane Lee also works for Fiberlink, they CANNOT add her email address into SFDC as jlee@fiberlink.com solely because they know the format
  - ALL leads must give permission to be emailed if they do not come from a marketing campaign.

Frequently Asked Questions

1) I received a lead without all of the contact information. What should my next steps be?

- First check to make sure they are not opted out of email.
- If they are not opted out, and there is no Phone number send them a follow up email with basic info about Fiberlink
- If there is a phone number, but no email address, follow the normal process for contacting a lead.
  - If you are able to contact the lead, try to get the missing contact information and fill it in.

- 2) I have contacted the lead and they no longer want to receive emails or phone calls from Fiberlink. What should my next steps be?

- Change the Lead status to "do not call"
- Scroll down to "Marketing information" and opt them out of email
  - This is VERY important, because of the CAN SPAM laws of 2003, when a contact asks to be opted out businesses have to comply.
- Search their name in Salesforce.com to make sure there are no duplicates
- If there are duplicates, inform the lead owner of the duplicate lead that they no longer want to be contacted by Fiberlink

Frequently Asked Questions

3) I have found a duplicate lead. What should I do with it?

- Change the status of the duplicate to “do not call”
- Write in the lead comments that this was a duplicate
- Add your initials and date to the comment.
- Send Marketing an email about the duplicate lead
- Marketing will merge the lead information into the original lead owner

4) Why do my lead counts go down sometimes?

- Due to of duplicate leads in the database, marketing will periodically “de-dupe” to avoid more than one ASR calling on the same lead
- Cleaning out the duplicate leads helps keep the data clean, but makes the actual lead count decrease

Frequently Asked Questions

5) I have a lead that has an old lead ranking. Can I change the ranking?

- Yes, the lead rankings are changeable for this reason.
- If it is an old ranking, please change it to the appropriate ranking

6) I have made an appointment and added the lead to the ASR/SMB campaign. Should I remove the original campaign it came from?

- *NO* Never remove a lead from any campaign unless directed to do so by Marketing.

Frequently Asked Questions

7) I received an international lead. Should I call them?

- Yes, if you have been assigned an international lead then make the call on them. Generally, one ASR will be picked to make international calls.

8)I have a lead who is interested but on the fence. Is there any collateral we can send?

- Yes, Marketing is always willing to help the ASR/SMB team get more appointments.
- If you have a lead that you think would be persuaded with some collateral, please let Meghan or Josephine know.
- Note: we can not give collateral to EVERY lead, so make sure it is a qualified lead before requesting marketing materials.

Frequently Asked Questions

11) Why does marketing need all this information on a lead?

- There are many reasons why this information is important to marketing
  - Keeping the database clean and accurate
  - Finding better qualified leads
  - Improving the sales process
  - Eliminating campaigns that are not producing quality leads
  - Accurate reporting and analysis
  - Ensuring Validity of Data.