LONDONIST HOSPITALITY –SALES AGENTS - Selling Workflow

Lead Identification & Qualification

1

Action:
Identify potential leads from various sources (events, referrals , online inquiries, CRM data)

CRM Action:
- d. Create a new lead entry
- e. Record key details (name, contact info, source and initial notes
- f. Qualify lead by assessing interest, budget and needs

Initial Contact and Needs Assessment

2

Action:
Reach out to the lead via email, call or meeting

CRM Action:
- a. Log the contact activity with date, time and outcome
- b. Record lead's specific needs, preferences and challenges under "notes" or "Requirements"

Product Presentation

3

Action:
Present tailored solutions to the lead, including service packages, pricing and benefits.

CRM Action:
- a. Upload product brochures or presentations decks sent to client
- b. Schedule and log meetings or follow-up calls
- c. Update the lead's stage in the sales pipeline to "Presentation/Proposal"

Proposal Submission

4

Action:
Send a formal proposal, including itemised pricing and terms

CRM Action:
- a. Attach the proposal to the lead's CRM profile
- b. Set a follow-up reminder to check for feedback
- c. Note any revisions or objections raised by the client.

Negotiation & Objection Handling

5

Action:
Address client concerns and revise offers as necessary

CRM Action:
- a. Record Objections and resolutions in the CRM
- b. Update proposal details if changes are made
- c. Track all communications and keep a timeline in the CRM

Closing the Sale

6

Action:
Finalize the agreement, sign contracts and confirm the order

CRM Action:
- a. Move the lead to the "closed Won" stage CRM
- b. Upload signed contracts and confirmation emails to the lead's profile
- c. Generate and save an invoice (if applicable) within the CRM or linked accounting software

Coordination with Operations

7

Action:
Notify the Operations Assistant about items sold to Clients

CRM Action:
- a. Share Client order details with relevant teams via CRM integrated workflow
- b. Set a task for the operations assistant for the weekly collection list preparation

Delivery & post-Sale follow-up

8

Action:
- Ensure successful delivery of items
- Conduct follow-up to ensure client satisfaction and address any issue

CRM Action:
- c. Update CRM with delivery confirmation and client feedback
- d. Create a task for a post-sale check-in after an appropriate time (e.g. 1 week)
- e. Log any upsell or cross-sell opportunities

Reporting & Performance Tracking

9

Action:
Analyse Sales performance and trend

CRM Action:
- a. Generate reports on sales activities, conversion rates and client feedback.
- b. Evaluate performance against targets to identify areas for improvements.

Ongoing Relationship Management

10

Action:
Maintain a relationship with the client for future opportunities

CRM Action:
- a. Set periodic follow-up reminders
- b. Add notes on client preferences or potential future needs
- c. Keep the client in a segmented marketing list for tailored campaigns