



different types of opportunities will come from your digital sales strategy.

“Leads” and “Digital Ups”

LEADS & DIGITAL UPS



Leads are consumers that did not ask a direct question.

These leads are **Red**, **Yellow**, or **Blue**.



Digital Ups are consumers that have asked a question and/or scheduled an appointment and need assistance ASAP.

Digital Ups from the website show up as “flagged” 🚩 in CRM.



PHASE 1: FOLLOW-UP PROCESS

- **The experiences that will be live in Phase 1 include: Ask A Question, Request More Information and Check for Special Offers. All of these opportunities should be considered “HOT” Leads / Digital Ups.**
- All PERQ Opportunities will receive Branded Lead Nurture (Email Automation) based on what was learned from website.
- Remember to: Give prompt answers, check-in, and attempt to get an In-Store or Virtual Appointment
- Use OPEN-ENDED QUESTIONS when responding: Questions that are not easily answered with “yes” or “no”
 - I have a tool I will send you to help with this
- When an appointment is scheduled in the CRM, consumer will receive confirmation and reminders via email/text.

THE “MAGIC” FORMULA:

● INTRODUCE YOURSELF & YOUR STORE

- ❖ Hey (Customer Name), this is Your Name @ Store Name.

● ADDRESS THEIR QUESTION & ANSWER IT

- ❖ I see you had a question regarding _____ (XYZ QUESTION).
- ❖ Then, give the answer...

● ASK AN OPEN-ENDED QUESTION TO CONCLUDE

- ❖ Use a relevant question that is not easily answered with “Yes” or “No”.
- ❖ See Open-Ended Question Repository for examples



PHASE 2: FOLLOW-UP PROCESS

- The experiences that will be live in Phase 2 include: all experiences from Phase 1, as well as Product Assessments/Quizzes, New Customer Welcome & Exit Intent. All of the opportunities with a red flag 🚩 are Digital Ups.
- Use the same Follow-up Process / Notes from Phase 1...HOWEVER...
- Now you need to prioritize your time and efforts: 🚩 / Red / Yellow / Blue is the order of importance.