**Quick Start Guide Workflow #2 - Attending to the Opportunities:
Flagged Opps, Red and Yellow Dots**

* Make sure all opportunities are assigned to someone in the CRM
* Using your WORK board, click on the Contact Record and review the lead in the PERQ Tab
* Analyze the information you have and decide on some open-ended questions you could sprinkle into your follow-up.

**For Email**: Use the Email Icon. Pick out an email template that is loaded for you

* + If you don’t have these loaded, ask your PERQ CSM for assistance
* Personalize the email and send.
* Then, head back to the Contact Record, if not automatically there, and set yourself a PENDING TASK for 1 to 2-days away and follow-up again if you haven’t heard back.

**For Texting**: First, make sure you have ALREADY responded to all new text messages before starting the individual journey, here. (See ***Quick Start Guide Workflow #1 - Starting your day*** for more information)

Use the Texting Icon. Remember to treat texting like a phone call!

* Introduce yourself, your company and personalize the text to the customer’s specific journey. Don’t forget to add in those open-ended questions – and use PROPER spelling & grammar!

**PRO TIP:** Use a text to ask for a phone call! If you can get the customer on the phone, you will have a higher likelihood of them engaging and buying. **Example**: *Hey Marie, this is Sam Smith from XYZ Furniture. I noticed you were interested in a new sectional (looks like a Contemporary one, at that!) – and, I was hoping to give you a quick call to discuss. Would you have a few moments right now, or can I set up a better time to reach you?*

* Once you send the text, be sure to go back to the Contact Record and set a PENDING TASK to follow-up again with the customer in the next 1 to 2-days, in the event that you do not hear back from him/her.
* If the customer DOES text you back, you will get a notification via the PERQ CRM Mobile App – assuming all notifications are turned on.
* Remember to keep that texting board clean!

***NOTE: Texting does NOT use your personal cell# if you text from within the CRM. It uses a local, assigned number instead.***

**For Phone**: If you decide to call and you don’t want your personal cell # listed, please use the store’s land line.

* Using phone callas as part of your cadence is 100% OK!
* Be sure to log your phone call activity in the Contact Record – History Tab 🡪 +New Activity
* If you leave a VM, be sure to try another method for follow-up, too, before your cadence is over.

*FLAGGED Opportunities should be prioritized, first, and ALWAYS attended to.
Red Leads are next on the priority list...and, if you have time, attend to the Yellow Leads.*