2021

Freshsales Protocols and Procedures

RESIDENTIAL FUEL SALES

SANTA ENERGY

Abstract

This document will go through the procedures of working in the different modules within Freshsales. The procedures written out in the document are to ensure precision in creating leads, contacts, accounts, and deals and updating all of our systems with current information in the process.

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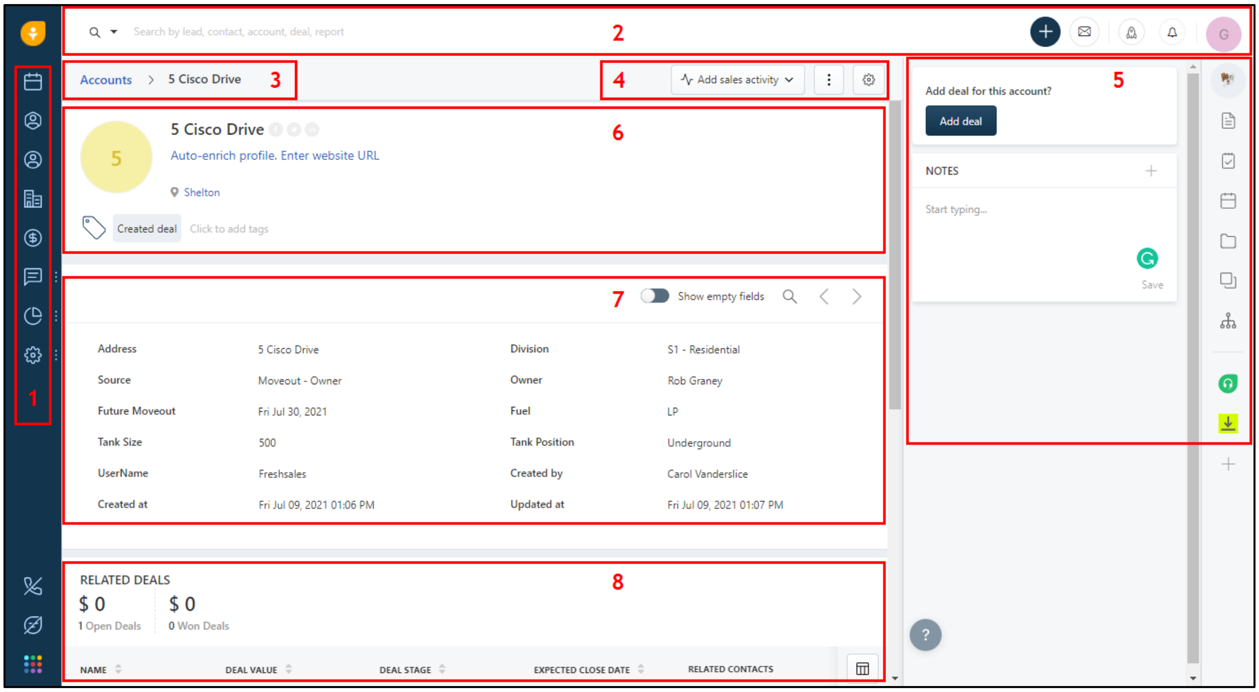
Navigating Freshsales

Screen Layout



The Freshsales screen is broken up into six major parts and follows a "module" style format with the same layout for each (aside from the Reports and Conversations:

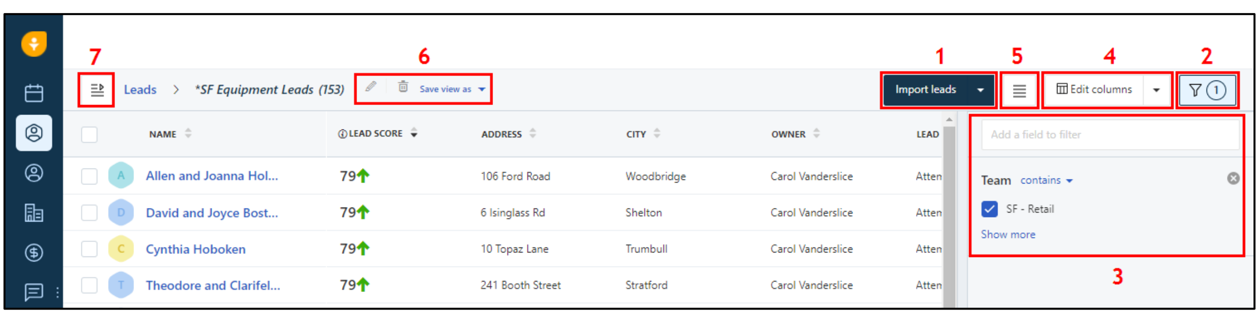
1. The left side **menu bar** gives access to each of the 7 modules and settings.
2. The **top navigation bar** is reserved for searching, adding new information, sending emails, notifications, and personal settings.

In the Leads, Contacts, Accounts, and Deals modules:

3. The top **breadcrumb header** will display the module you are in and then the specific lead, contact, account, deal, or report you are in.
4. **Quick actions** to add an activity, edit the information, or edit the sections are found here.
5. **Module tools** are on the right side of the screen to add notes, create tasks, make appointments, attach files, check for duplicates, and view the account hierarchy.
6. **Key information** will be shown in the top bar within the module.
7. **Supplementary information** will be shown in the group below with an option to show/hide empty fields.
8. **Attached Deals and Activity** is found at the bottom.

Editing Views and Filters

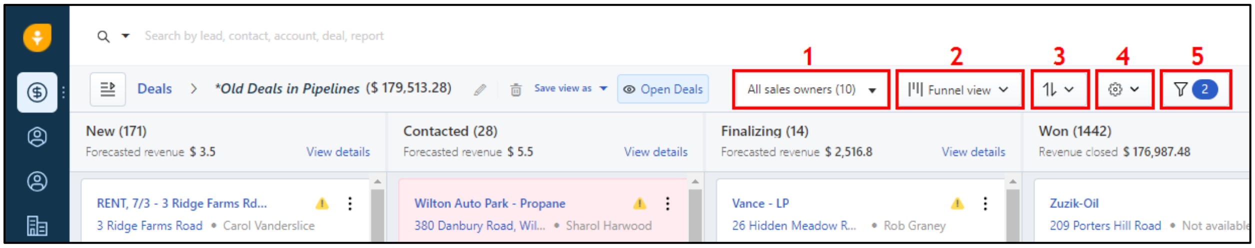
The Leads, Contacts, Accounts, and Deals modules provide you the information held in the system based upon the views and filters you have in place.



1. You can import a list of leads, contacts, or accounts from an Excel or CSV file.
2. To start, select the filter icon to add, select, and remove filters to your liking.
3. Below will show all the filters you have in place.
4. You can then edit the columns of the information you are viewing to either add, subtract, or rearrange the information displayed.
5. The view can be switched back and forth from a default or compact view style.
6. After making edits to the filters you can then edit the name of the View and save it for future use.
7. You can then select from the list of preset views or choose from a view you have created yourself.

Funnel View in Deal Module

The only module with a variance in the filters and layout is the deal module. The deal module has an option to view all deals in a “Funnel” view which displays all deals in their given stages along a chosen “Pipeline”.



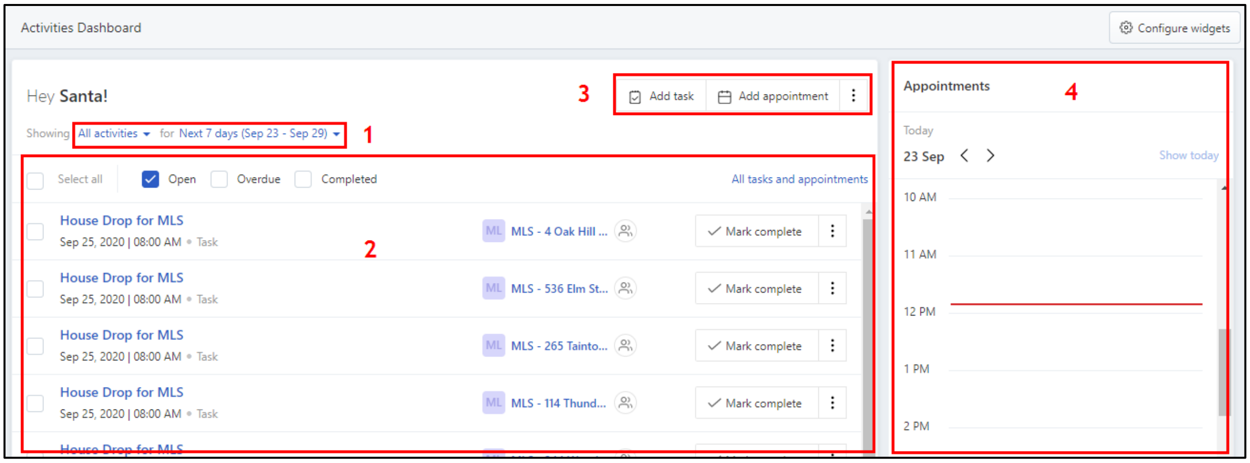
The differences in this module are highlighted as follows:

1. You can quickly toggle between sales reps from the dropdown option.
2. The funnel view can be switched for a list view from the next dropdown.
3. The deals can be sorted to your preference.
4. Then you can edit the deal pipeline settings.
5. Further filters can be applied to your current view.

Starting Your Day in Freshsales

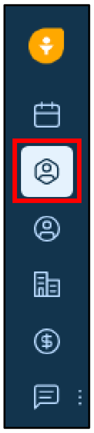
Typically your day can start out in the Activities Dashboard module to see what you have lined up for the day ahead.

1. Determine the time span and type of items to view.
2. See an itemized view of upcoming tasks and appointments.
3. Add a task or appointment.
4. View the day’s appointments and tasks in a hour by hour view.



Lead Module

Lead Layout

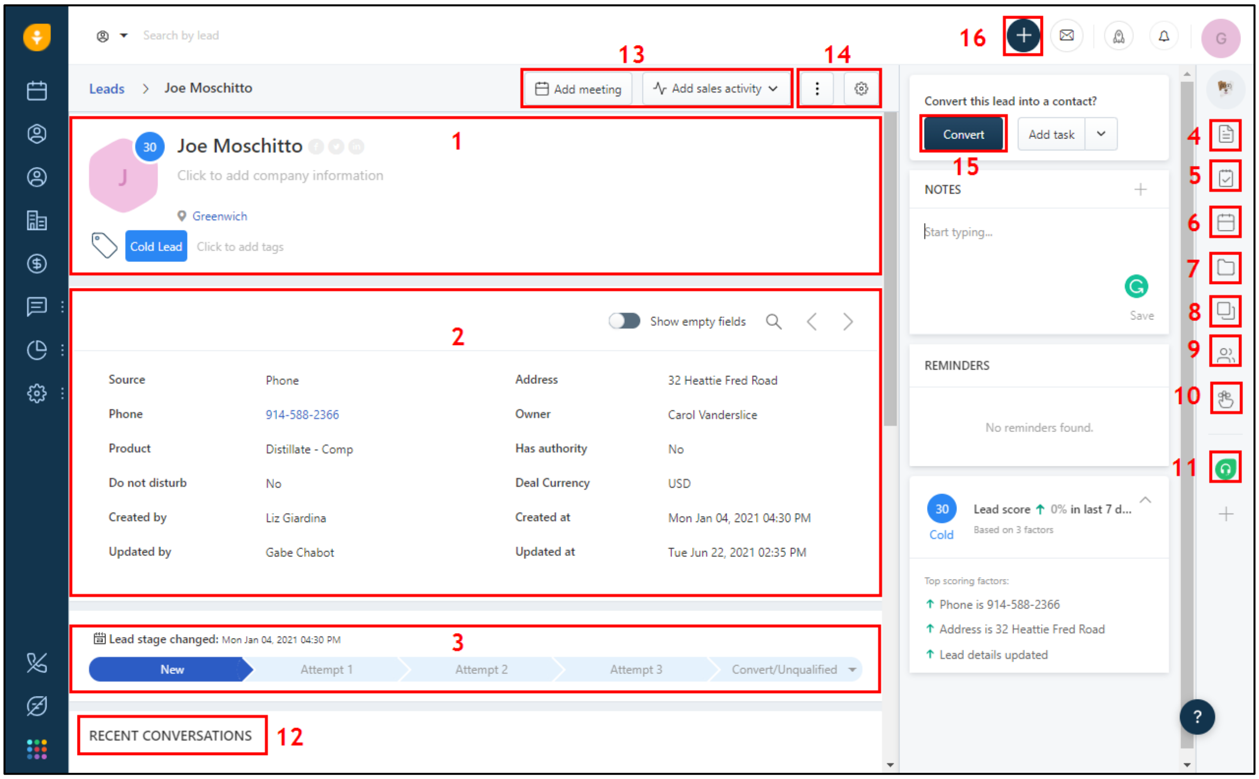


When you have created a lead or you are assigned a lead, you can work on that particular lead within the Lead module found on the left hand side of the screen (see image to the right). Now that you are in the Lead, you can:

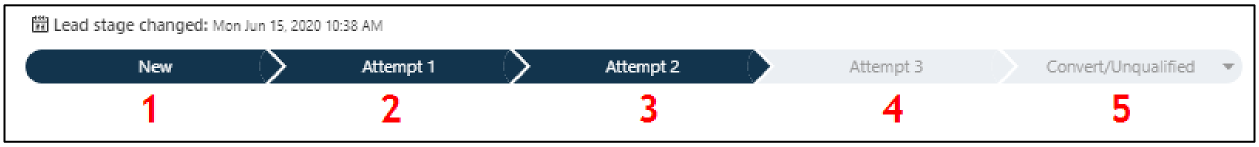
1. Fill in key information:
   This where you input the lead's name and address.
2. Enter in all supplementary information to add detail to who the lead is.
3. Move the Lead along the stages towards becoming a Contact.
   You have 3 attempts to make contact with the lead. After 3 attempts, you will either convert the lead to a contact (successful connection) or convert to unqualified (unsuccessful in reaching person).

Within the toolbar found on the right side of the Lead module, you have various tools you can use in the lead conversion process:

4. Add notes to the lead describing your interactions, attempts, or any other useful information.
5. Create tasks to continue the progress in converting the lead.
6. Make appointments for yourself and/or connected with others that are related to the development of this lead.
7. Attach files to the lead in a multitude of formats such as images, pdfs, documents, etc.
8. Check for duplicate leads within Freshsales to make sure there isn't another lead with similar information.
9. Check for connections to the account and see if there are accounts, contacts, or deals related to this lead.
10. Check to see if there are any reminders associated with this lead.
11. Create a ticket in Freshdesk to be worked on by our internal team in relation to a request/issue with the lead.
12. All of the logged conversations with the lead (email and phone) will be in this section.
13. Quickly add a meeting or other sales activity, like a call log, right from these buttons at the top.
14. There are further options to edit the lead from the 3 dots including; Edit, Clone, Delete, Add to sequence, Remove from sequence, Export, Send SMS, Unsubscribe, and Forget.
15. When the lead has been successfully won over into potential business, we can convert the lead to a contact (as well as create an account and deal.
16. At any point within Freshsales, the blue Plus button is available to add a new lead, contact, deal, appointment, etc. in Freshsales.



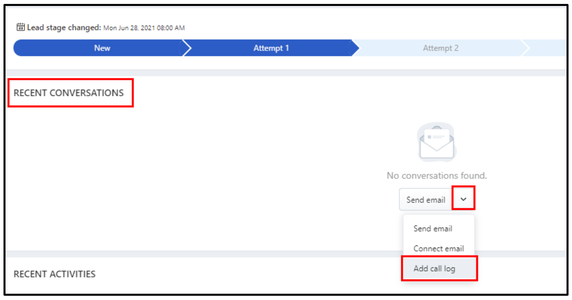
Lead Stages and Logging Attempts



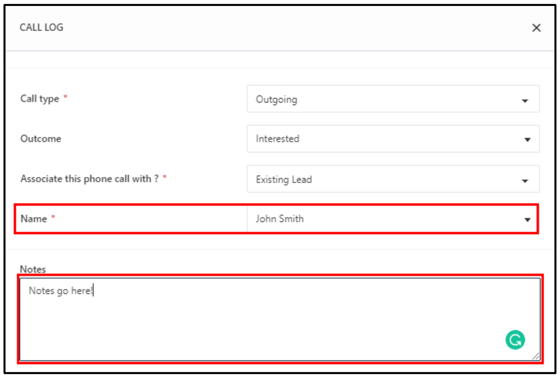
1. When a lead is first created it will be automatically set in the **New** stage. This means there is minimal information given and the Lead has not yet been reached out to.

For each attempt you make to reach out to a lead, you will need to **Log the Call** or other type of attempt in the Call Log.

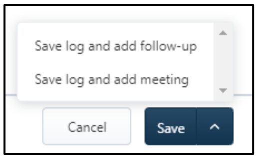
- For your first log you can either add the log on the lead's page under the "RECENT CONVERSATIONS" section:



- Or you can add a call log from anywhere in Freshsales from the blue plus button and then selecting **Add call log**. Then enter the information of the type of call and outcome, making sure to attach the log to the correct lead:



- You can then save the log to the lead or choose a direct action after saving:

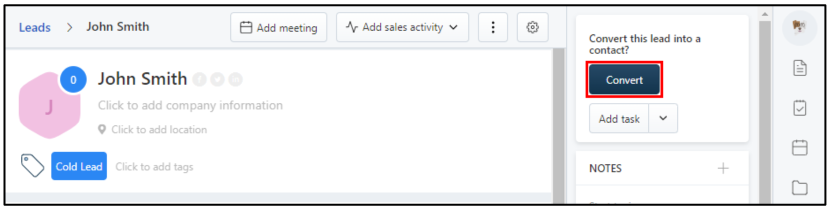


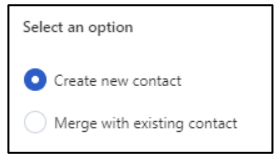
2. **Attempt 1** – You have reached out to the lead either my calling or emailing with no response.
3. **Attempt 2** – You have reached out to the lead either my calling or emailing with no response.
4. **Attempt 3** – You have reached out to the lead either my calling or emailing with no response.
5. If after 3 attempts with no contact you would then select **Unqualified**, this takes the lead off of your list of potential contacts. If you are successful at contacting the lead after any attempt number, you can **Convert** the Lead into a Contact.

Note: At a later date, your leads can be sorted by all leads that are **Unqualified.** This list can then be used to cycle through missed opportunities and try reconnecting. If not, this list can be hidden from view as a way to clean up your focus.

Converting Lead to a Contact, Account, and Deal

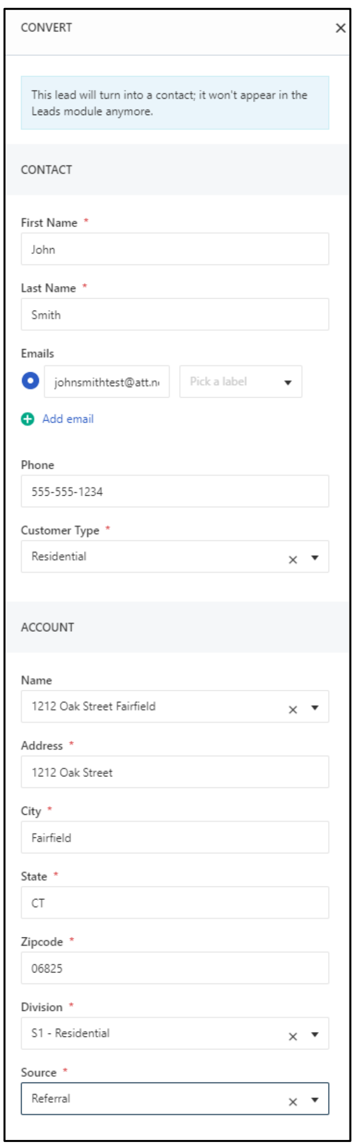
After selecting **Convert** you can then “Create new contact” or “Merge with existing contact”, (you can use this to check to see if there is another contact with the Lead’s name. Most likely, you will be creating a new contact).

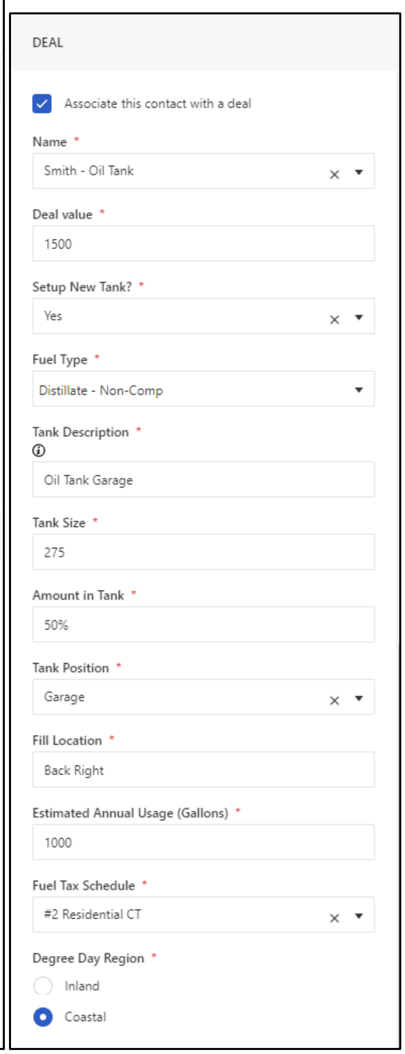


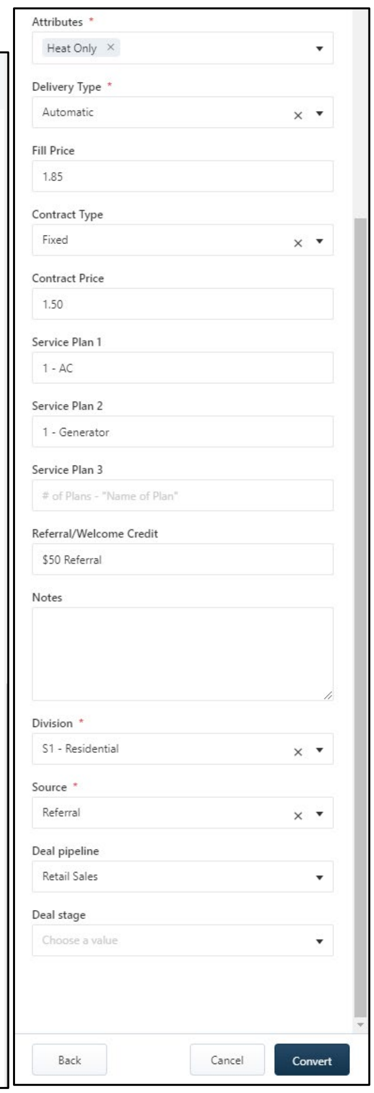


From here, you can make the contact, account, and deal right away.

1. Just fill out all the fields that are visible with the information you have on the customer and the house:
2. For the deal, if it will become a new tank setup in Cargas, select the option **“Yes”** under **“Setup New Tank?”** This will show all the fields needed for Cargas tank setup.
3. Once you are done, you have the option of Deal Stage at the end. If this is a quick add from a won deal, select **Won** for the deal stage and then hit **Convert.**

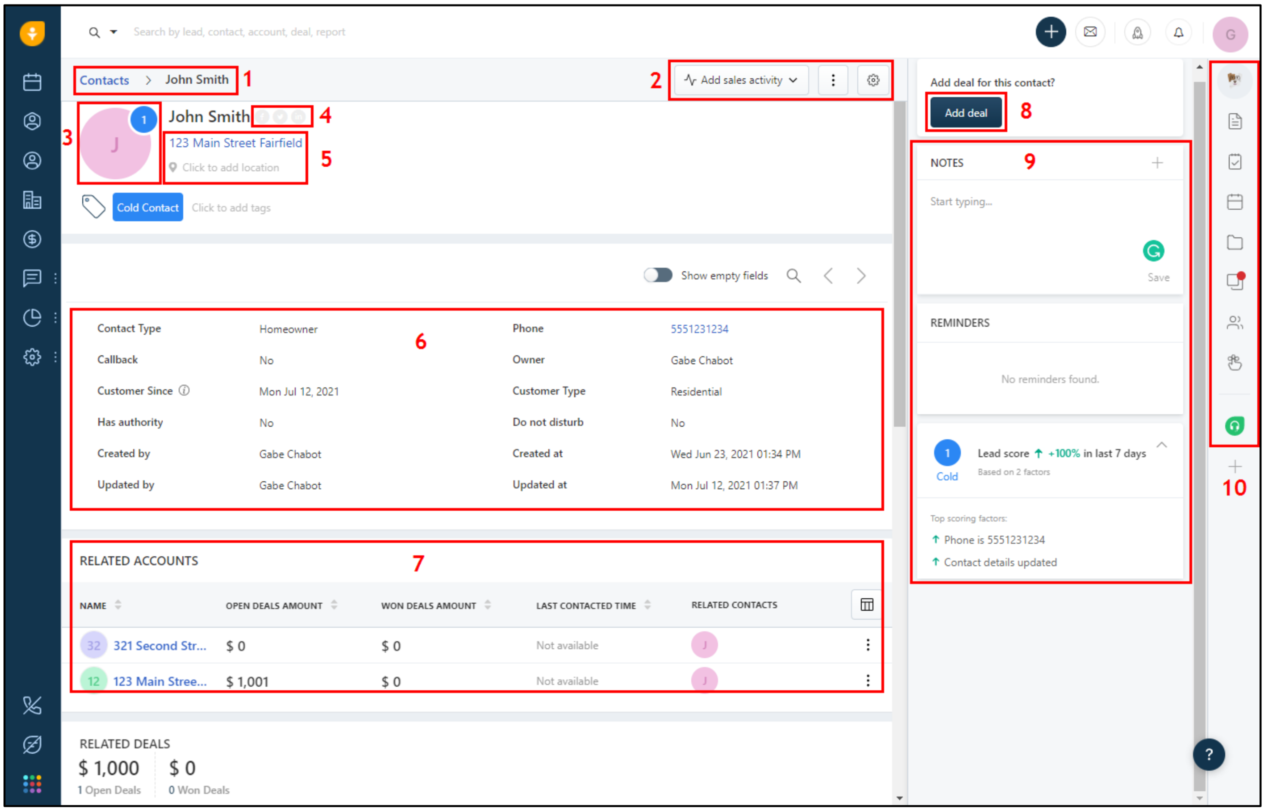






Contact Module

Once a contact has been created, you will be directed to the newly created Contact page. The layout on the Contact module is similar to the Lead module with some key differences.



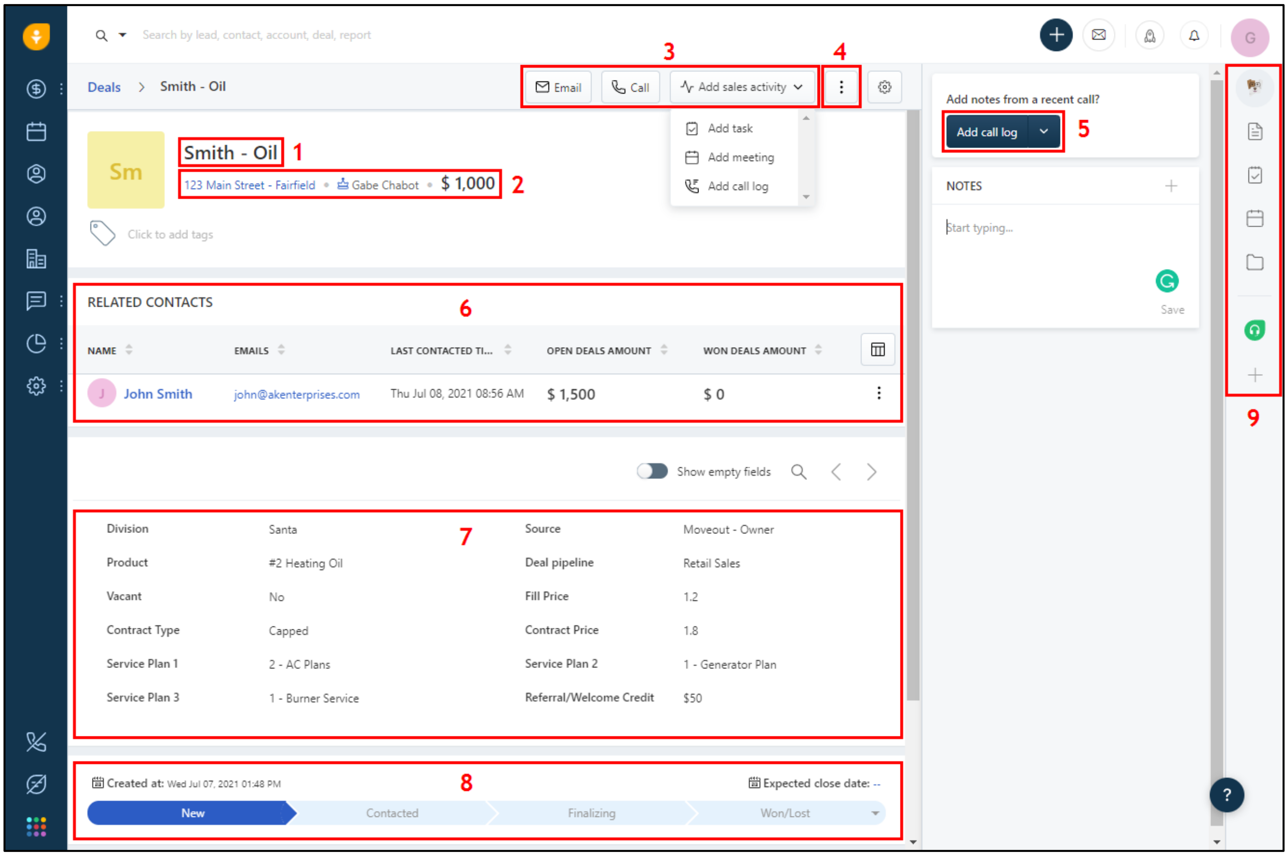
1. Top of the module will be a "breadcrumb" navigator that shows which module you're in and the specific contact you're viewing.
2. You can then quick add an activity to the account, edit information, or change the settings of the page.
3. The contact's score will appear next to the icon. The score determines the amount of information and interaction you have with them. The more information and more interaction the higher the score.
4. If there is an email attached to the contact that is also connected with a social media account, it will automatically be linked.
5. The contact's account name will appear in blue under the contact's name. You can have numerous accounts attached to one contact. The "main" account or first added will show in blue.
6. The Contact's supplementary information is in this section. Use this section to build up the profile of the Contact to better interact with the customer.
7. Any related accounts to the contact will show here, and below that would be any related deals.
8. On the Contact module you can create another deal for the contact from this button.
9. This is the visible tools section where you can use any selected tool from the right menu. **Notes** are preselected and are important for you as the salesperson and can be thought of as the notes in Cargas; documenting all activity on the Contact. If any possible duplicates are found within Freshsales they will appear on this part of the screen as well. This looks for similarities in names, emails, phone numbers, addresses, companies, etc.
10. The rest of the tools are in the tool bar to the right including: making notes, adding tasks, setting appointments, attaching files, check for duplicates, see connections to the account, see any reminders for upcoming appointments or tasks associated with the contact, and create a Freshdesk ticket connected with the contact you are viewing.

Remember:

The contact is always a person and can be attached to multiple deals and/or accounts. The contact may not always be attached to the same account (if they move) but will always be attached to a deal that was made.

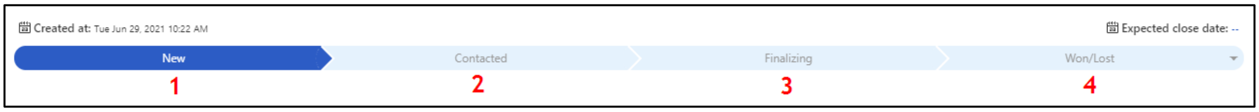
Deal Module

Screen Layout



1. The deal name is in bold at the top, following the naming convention of “Customer Last Name” - “Product Sold”. In this example, it is **Smith - Oil**.
   a. The variations in the naming convention would be for MLS listings which would be Move-Outs which would be **MO** - “Address”. They would only be in that naming convention until we have made contact with the new homeowner.
2. This is where the connected account, owner of account, and deal value are displayed.
   a. Deal Value = estimated revenue for the year. So for 1,000 gallons at $1 per gallon, the deal value would be $1,000.
3. If you have an email address for the attached contact, you can email them, which would then get logged onto the deal directly. If you want to log an activity, the dropdown allows you to either add a task, add meeting, or add call log.
4. The 3 dots give you further options for the deal to either Edit, Clone, Delete, or Forget the deal.
5. Another quick option to add a call log is found here.
6. Any related contacts attached the deal would show up here.
7. All supplemental information will be housed in this section.
   a. This information is key because this will drive account setup in Cargas. In addition to having the correct customer name and address on the account and contact, here are the **required** fields to be filled out on the deal when a new account is to be setup in Cargas. The rest of the required information will be on the Contact and Account associated with the deal.
      i. Contract Type
      ii. Contract Price
      iii. Service Plans
      iv. Referral/Welcome Credit
      v. Equipment Notes
      vi. Additional Notes
8. The stage that the deal is in along your sales pipeline.
9. All of your normal module tools.

Deal Stages



1. **New**
   When a deal is first created it will be placed in the **New** stage. A deal in this stage is a Move Out with which you have not spoken to a contact yet.
2. **Contacted**
   In order to be in the **Contacted** stage:
   a. You know the name of the person and have updated the Deal Name to the proper naming convention. (Customer Last Name – Product/Service Being Offered) You've reached out or are engaged in discussion with the person.
3. **Finalizing**
   In order to be in the **Finalizing** stage:
   a. Customer has given verbal approval of deal.
   b. Awaiting credit app submission.
   c. Scheduled/attended tank inspection.
   d. DocuSign contract has been sent to customer.
4. **Won/Lost**
   In order to be in the **Won** stage:
   a. Credit has been approved.
   b. DocuSign contract has been signed by customer and received (for Propane).
   In order to be in the **Lost** stage:
   c. Customer has rejected offer.
   d. Reason for loss was documented.
   e. There is no chance of future follow-up.

Adding a Call Log

As you progress a deal along, log the calls that advance the potential of the sale. Refer back to page 5 on adding in a call log from the Recent Conversation tab, or add a call log from the blue plus button on the top right of the screen.

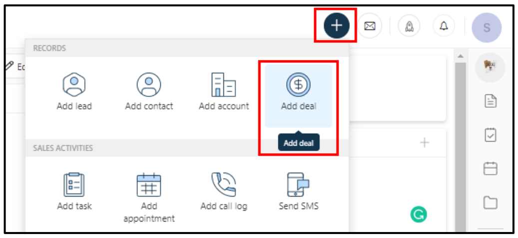
Adding a Deal

To add a deal quickly, click the + button at the top right of the Freshsales window, then select "Add deal".

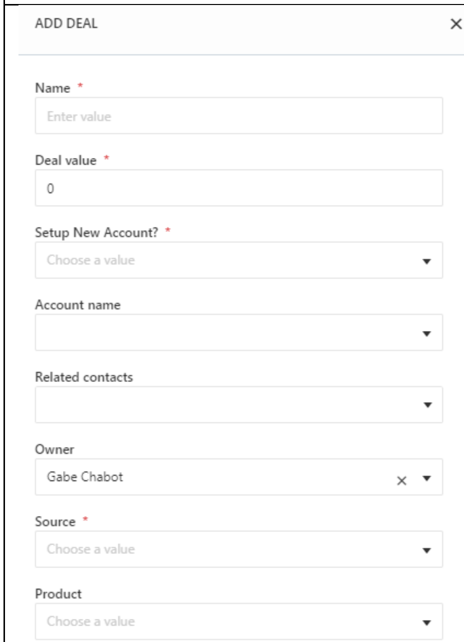
Then fill out the "Quick Add" form with the fields found in the quick add screen.

Once you have completed the form, select Save at the bottom.

By adding a deal like this, all at once you have:
1. Created a deal
2. Created an account and attached to the deal
3. Attached a related contact(s) to the deal (that's already been created)



The first screen from the quick add will look like this:

<table>
<tr><th>Quick Add - No Account Setup Needed</th><th>Quick Add - Setup New Account Checked</th></tr>
<tr><td>


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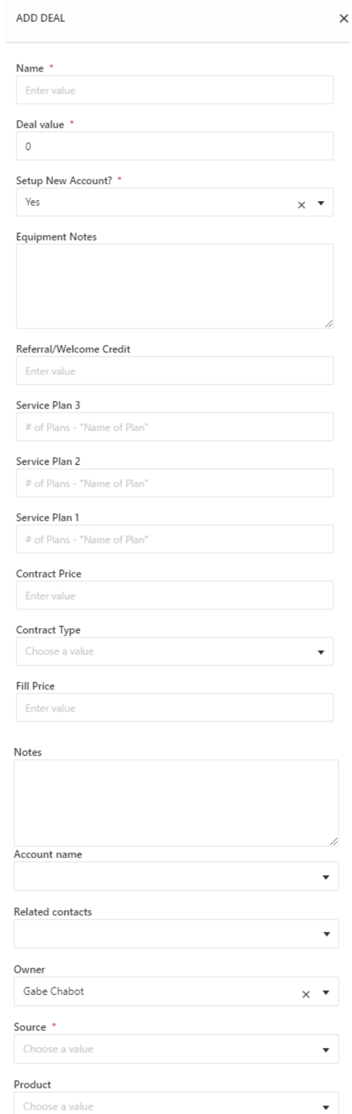
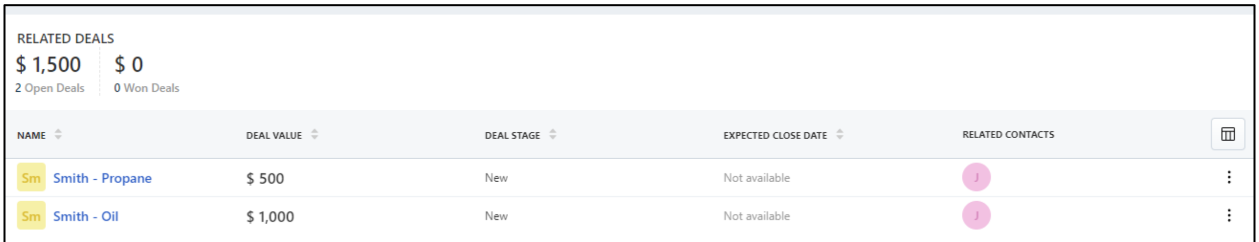


</td></tr>
</table>

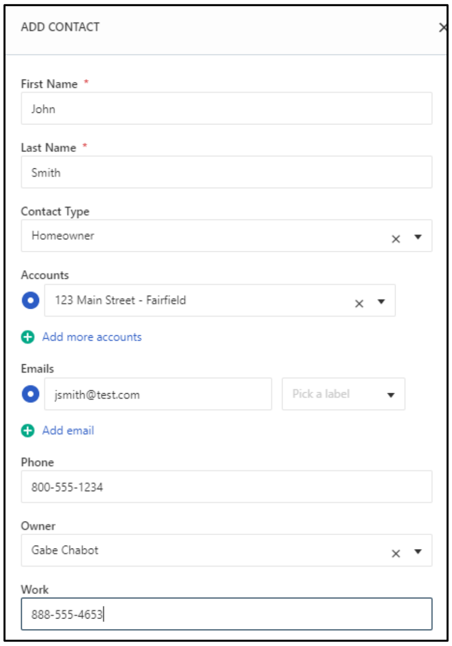
Different Products and Services

Each product is added as a separate deal with the respective service plan(s) associated with the deal if need be.

The naming convention of a deal will be the "Homeowner's Last Name - Product/Service Sold". The deal value will then be the expected revenue for the first year. For example: If a customer is buying 1,000 gallons of oil at $1 per gallon, the deal value would be **$1,000**.



Creating Accounts



From the big blue plus button at the top of the screen, you can then select **Add contact.** From here you can quickly create a contact and then attach it to a newly made Account by just typing in the name of the new account (account name is the street address).

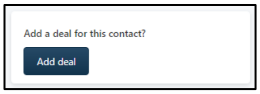
Only one field is **required** to make a contact, and that is a Last name. However, these are the other fields available for quick add:

1. Last name of customer
2. First name of customer
3. Contact type
4. Account name (address of home)
5. Email address(es)
6. Mobile phone number
7. Sales rep (you)
8. Work phone number

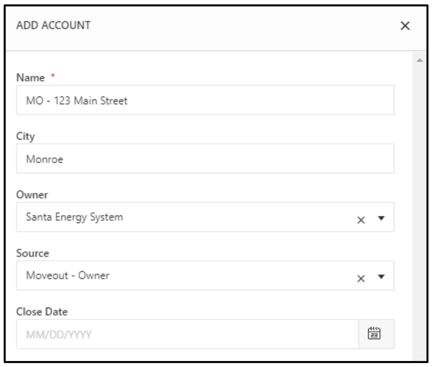
Once you've completed this, you can hit **Save** at the bottom and you will then be taken right to the newly created contact.

In the contact, you can now easily add a deal by selecting "Add a deal for this contact" in the top right corner of the screen.

After following the protocol above for adding a deal, you will then have an account (house) contact (customer that owns house) and a deal (potential business) created.



Move Outs



You will need to create an account when there is a move out. Follow the protocol below in order to enact automations put in place.

Use the quick add function to create an Account, entering in the:

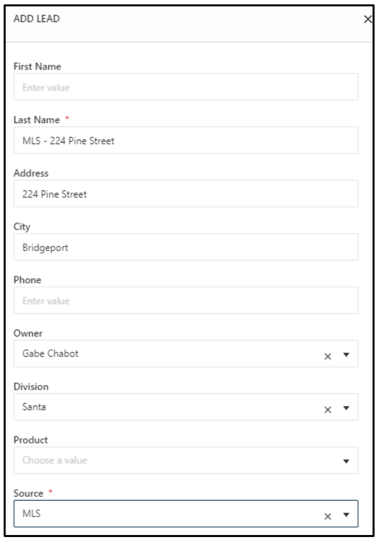
- Name (MO – Address)
- City
- Owner (Salesperson)
- Source (Moveout – Owner)

Once the account is created, a workflow is enacted, creating a deal called **MO - Address** in the **New** deal stage and task automatically.

As you work on the Move Out deal, you can move it along the deal stages as you would any other deal. Once you've made connection with the buyer, you can then create a contact for the buyer then attach it to the account and deal.

Then edit the name of the account to remove the MO and edit the name of the deal to be **Last Name - Product.**

MLS Listings - Leads First then Accounts



MLS Listings are uploaded in bulk or added in manually as **Leads**.

If you are manually entering in the lead, go to the big blue plus button and then select **Add lead.** Then fill out the quick add form with as much information as available but will always follow the proceeding format for these fields:

Last Name = MLS – "Address"
Source = MLS

Workflows: Leads to Deals

Leads

People who we have not communicated with start out as **Leads**. Leads can be a name, phone number, email address, or other basic means of connection.
As a lead, you are allowed 3 attempts to connect with a real person before converting them to a contact. Once you have made a successful conversation with the lead, you can then either convert it into a **Contact** or set to **Unqualified.**

Contacts

A contact is a person you have successfully communicated with and is interested in business. The contact will become the personal profile of the person you interact with when it comes to making deals.

Accounts

The account is the house address. The home is essentially the company you are selling product to. Accounts are the ones that will retain all the deal transactions, because if a customer were to move out of a house, we would still want that deal history attached to the house.

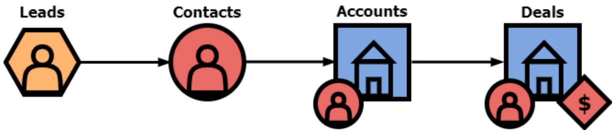
Deals

The deal is the product or service you are offering to a customer. **All deals are made on the account.** When you create a deal on an account, you must have a contact associated with the account as well. This way we are registering the deal with the house, and having a related contact tied to it.

Visual Diagrams of How Modules are Connected

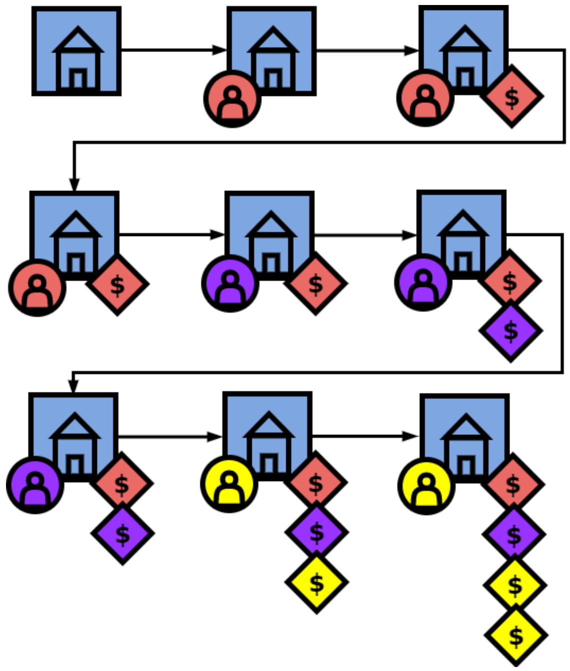
Below shows the simple process of how a lead starts in Freshsales, then converted to a Contact and attached to an Account with a Deal:

- A Lead is the start and then converts into a contact once substantial information is received and communication has begun.
- That contact is then attached to an account.
- A deal related to that contact is made and attached to the account



To the right, shows how a history builds on the account in Freshsales, as a home stays in the CRM and has new owners and new deals:

- An account is a house (123 Main Street Fairfield)
- When we know who the homeowner is, we create a contact for them and attach them to the account (house)
- Then we can make a deal in relation to that contact (homeowner) and attach to the account
- If that homeowner moves out of that house, we can remove them from the account and then create a new contact for the new homeowner. Then attach them to the house.
- Notice how the old homeowner's deal stays with the house as part of its history.
- For each subsequent homeowner, new deals are made and attached to the account in addition to the contact.
- The only connection that is broken in the chain of homeowners is the contact to the account.



Required Fields for Completing Account Setups

Below are the fields that need to be filled in order to properly pass over to Sales Support for setting up an account in Cargas. The fields that are italicized and in red are required for each account:

Contact	Account	Deal
• *Customer Name* • *Customer Type* • *Customer Phone* • *Customer Email*	• *Address* • *City* • *Zipcode* • *Division* • *Source* • *Fuel Type* • *Fuel Tax Schedule* • *Tank Description* • *Tank Size* • Estimated Annual Usage • Home Size • Amount in Tank • Tank Position • Fill Location • Attribute • Degree Day Region • Delivery Type	• Fill Price • Contract Type • Contract Price • Service Plan 1 • Service Plan 2 • Service Plan 3 • Referral/Welcome Credit • Equipment Notes • Additional Notes

Data entered in Freshsales will be reviewed on Monday team meetings and needs to be filled out thoroughly in order to be accurately put through reporting at end of week.

Expectations for Freshsales Use

1. Add the homeowners and realtors you interact with as contacts.

Whenever you are interacting with someone that is involved with or related to the progression of a deal (not in Santa Energy), add him or her into Freshsales.

2. Log call activity for lead and deal advancement.

If you make a call to someone outside of Santa Energy related to the progression of a deal, log the call and attach to the related deal.
From the deal screen you can add a call either from the top "Add sales activity" dropdown or from the blue [Add call log] button.

3. Track deals through pipeline.

As you work on a deal, be sure to move it along the pipeline in real time so as to reflect current and accurate data.

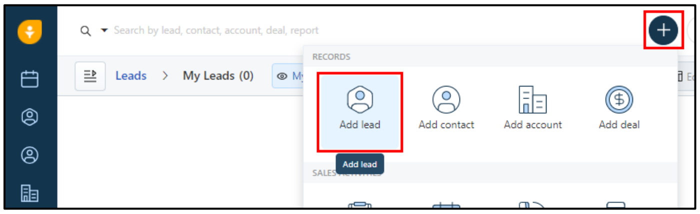
4. Add all prospects as a deal

Even if someone calls in and in that call they decide to decline business with us, that is registered as a deal lost.

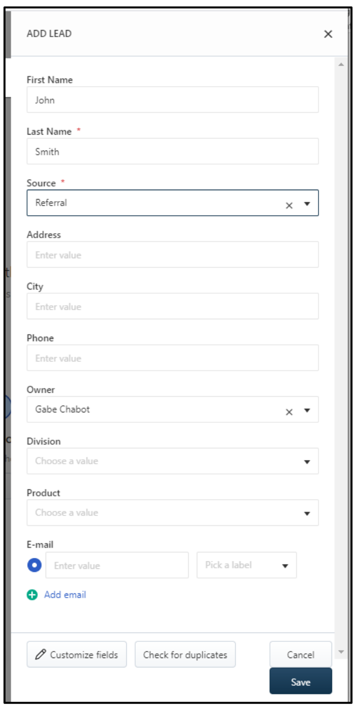
Quickest Way to Enter Deal for New Tank Setup

The quickest way to enter in a deal and the information needed to setup a new account and tank in Cargas is to enter in as a **Lead** first.
By entering in as a **Lead**, you can then quickly convert and create a contact, account, and deal all in one screen.

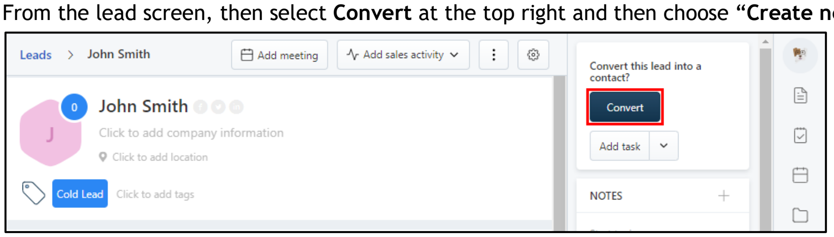
First add a lead from the big blue plus button at the top of the screen:

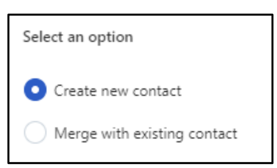


Then enter in as much information as you have at the moment or just the name for now. You at least need a last name and source filled in. Once that's done, hit **Save**:



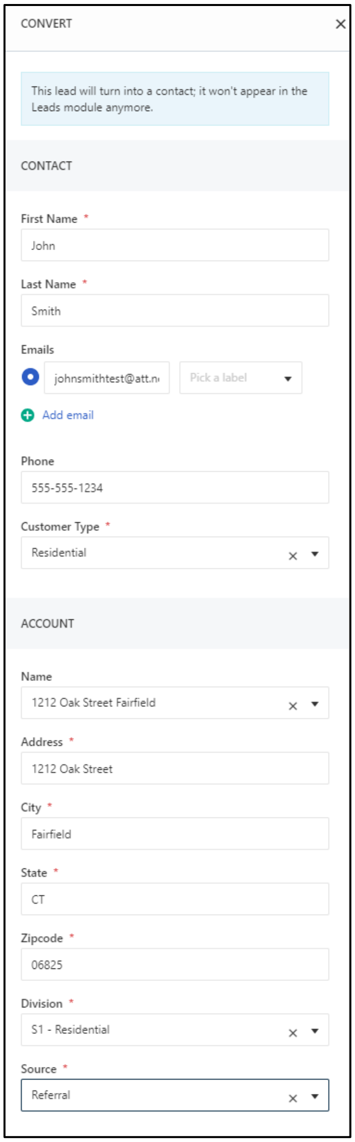
From the lead screen, then select **Convert** at the top right and then choose **"Create new contact"** from the next window:



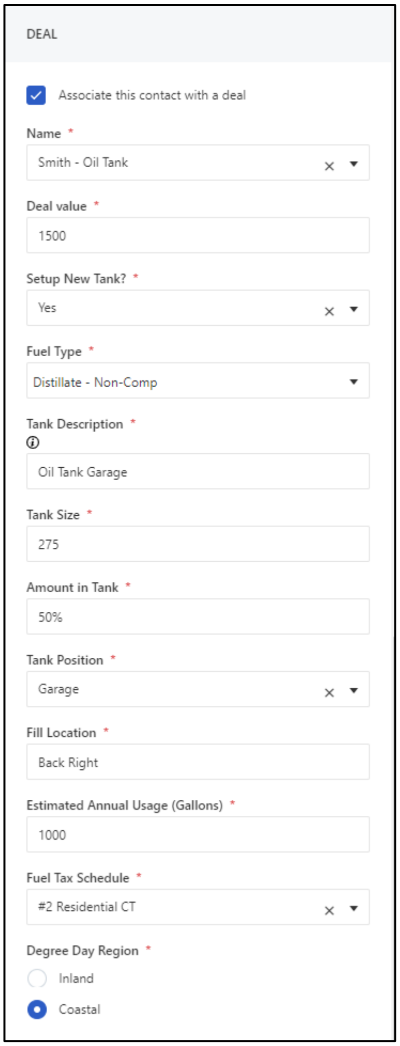


From here you can make the contact, account, and deal right away.

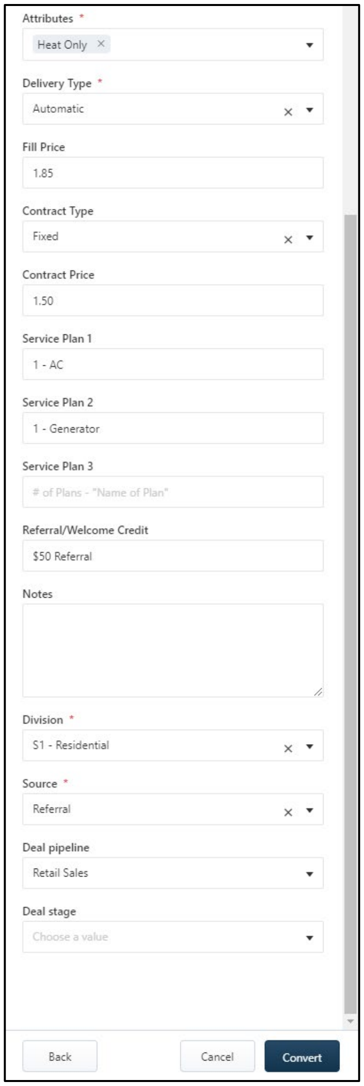
4. Just fill out all the fields that are visible with the information you have on the customer and the house:
5. For the deal select the option **Yes** under **Setup New Tank?** to bring up all the fields needed for Cargas tank setup.
6. Once you are done you have the option of Deal Stage at the end. If this is a quick add from a won deal, select **Won** for the deal stage and then hit **Convert.**



1

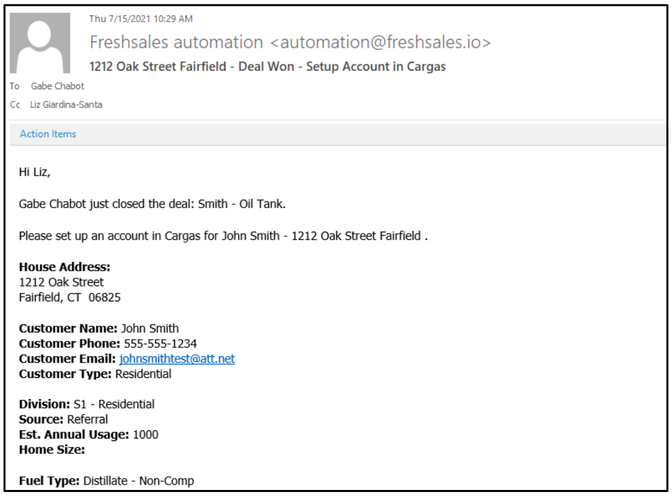


2



3

After converting a Won deal, an email will automatically be sent to the Sales Support team to setup the account. It will look like the example below:



Thu 7/15/2021 10:29 AM
Freshsales automation <automation@freshsales.io>
1212 Oak Street Fairfield - Deal Won - Setup Account in Cargas
To Gabe Chabot
Cc Liz Giardina-Santa

Action Items

Hi Liz,

Gabe Chabot just closed the deal: Smith - Oil Tank.

Please set up an account in Cargas for John Smith - 1212 Oak Street Fairfield .

House Address:
1212 Oak Street
Fairfield, CT 06825

Customer Name: John Smith
Customer Phone: 555-555-1234
Customer Email: johnsmithtest@att.net
Customer Type: Residential

Division: S1 - Residential
Source: Referral
Est. Annual Usage: 1000
Home Size:

Fuel Type: Distillate - Non-Comp

Reports Viewed at Regular Meetings

The data entered in to Freshsales is important because it drives the analytics looked at during the regularly scheduled team meetings.

The metrics looked at each time would be:

- Deals Won and Lost in the last 30 days by Salesperson
- Move Out close report for the last 30 days
- Average deal age for the last 30 days by owner
- Email activity report for the last 30 days by owner
- Call activity report for the last 30 days by owner