SALES MANUAL

MANA IMMIGRATION

V7.1

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1.1. Introduction

1.1.1. Policy

To focus the efforts of the professional sales staff, the company shall determine which leads generated by advertising, marketing, and sales are prospective customers that should receive a sales call.

1.1.2. Purpose

To outline the procedure for managing sales leads and to identify leads ready for the professional sales staff's attention.

1.1.3. Scope

This procedure applies to all sales leads generated by marketing, advertising, and sales efforts.

1.1.4. Responsibilities

Marketing

The marketing team shall regularly provide the Sales Administrators with all leads generated by inquiry forms. Marketing shall adjust marketing techniques according to leads and sales statistics provided by Sales Management.

Sales Administrators

Sales Administrators shall gather information to qualify leads according to the prospect of potential sales and then attempt to set a sales call appointment for qualified leads. Sales Administrators shall also maintain a Leads Database, information about all incoming leads, and a Prospects Database for qualified leads. Sales Administrators shall complete the Lead Questionnaire and maintain the Prospect Database.

Sales Management

Sales Management shall set the qualifying procedure, define the qualifying parameters, and supply the Sales Administrators with the proper training, forms, and tools necessary to qualify leads. Sales Management shall also monitor and adjust the qualifying procedures and its associated forms and records to maximize efficiency and meet lead, prospect, and sales targets.

Professional Sales Staff

Professional Sales Staff shall provide information to the Sales Management daily or weekly on the sales status of qualified leads.

1.1.5. Definition

Lead

Any potential customer whose name and/or information was garnered through sales, marketing, or advertising techniques.

Lead Enquiry Form

A brief questionnaire form (available through trade shows, web pages, and advertising tear cards, for example) that has been completed and submitted by a potential customer.

Qualified Lead or Prospect

A business, organization, or individual identified by the company as having: a current or impending need; the resources to purchase or lease the Company's product; and the authority to purchase/lease.

Qualifying leads

Qualifying is the process that allows you to find out whether a lead is a prospect. A prospect is someone who has the potential to become a customer. Leads, on the other hand, are just potential prospects. If you do not qualify a lead, you may be wasting your time with someone who literally cannot buy from you.

Sales funnel

Sales funnel (also known as Revenue funnel or Sales process) refers to the buying process that a company leads its clients through, when purchasing products and services. A sales funnel is divided into several steps, which differ depending on the particular sales model. One common sales process is divided into four phases including:

Prospects become **aware** of the existence of a solution.

Prospects demonstrate an **interest** in a product by conducting product research.

Prospects **evaluate** competitors' solutions as they inch toward a final buying decision. A final **decision** is reached, and negotiation begins.

TO DO

- ✓ **Brief the person about the purpose of the telephone conversation.**
- ✓ **Master in Mana Immigration sales process and know the client's needs.**
- ✓ **Prepare a script and practice it.**
- ✓ **Introduce yourself and Mana Immigration.**
- ✓ **If it is not the first call, pull up details in our CRM while greeting.**
- ✓ **Get them to talk and listen carefully.**
- ✓ **Create a friendly atmosphere in which a conversation is happening and not an interview.**
- ✓ **Give a hint about your in-depth knowledge about the lead's needs**
- ✓ **Be concise and strategic.**
- ✓ **Be fair and objective to sound like a "nice advisor" and not a "nasty seller".**
- ✓ **Engage the person in the conversation.**
- ✓ **Engage the person in "a conversation" and not "an interview".**
- ✓ **Be creative and think outside the box.**
- ✓ **Answer questions patiently.**
- ✓ **Ask smart questions to clarify your points.**

NOT TO DO

- × **Do not bombard the inquirer with loads of information.**
- × **Do not talk about the price.**
- × **Do not be detailed and specific.**
- × **Do not push for signing the contract.**
- × **Do not sound bored or monotonous.**
- × **Do not sound casual.**
- × **Do not guide the client with a link or guideline outside the company's websites and social media network.**
- × **Do not talk about anything other than the business. An opener about the weather is OK.**
- × **Do not sound very formal or over-friendly but yet business-like.**
- × **Do not talk about our competitors, good or bad.**
- × **Do not talk about anything but the business. A conversation opener about the weather is OK.**

Cold calls

From time to time, we might need to make cold calls to potential business partners. These partners include but are not limited to: colleges, schools, travel agencies, etc.

Make sure you get the manager to talk to you. Never waste your time talking to a person who is not in a decision making position.

If a secretary refuses to get the manager or the owner on the phone, do not push and ask for calling later.

- Find general information about the business
- Conduct brief research and try to find the manager or the decision making a person
- Make a phone call and get the manager to talk to you

Sales staff make telephone calls via a Voice over IP (VoIP) service provider. All telephone conversations are recorded and can be found and played at a later date.

Privacy

The privacy of our clients is of the utmost importance to us. Hence, you should always talk directly to the prospective client about his/her case. When making a telephone call, confirm that you are talking to the person who has filled our assessment forms, as a lead's partner may answer the telephone.

1.4.1. Face to face meeting

TO DO

- ✓ **Be on time. Traffic jams cannot excuse you for being late.**
- ✓ **Introduce yourself and exchange business cards at the beginning of the meeting.**
- ✓ **Postpone the price details to the end of the meeting.**
- ✓ **Make eye contact throughout the meeting.**
- ✓ **Lead the conversation.**
- ✓ **Listen to the client.**
- ✓ **Reach agreement on specific next steps.**
- ✓ **Receive the first payment.**
- ✓ **Remain polite throughout the meeting even if the deal is not closed.**

NOT TO DO

- × **Never be late.**
- × **Do not sound very formal but yet business-like.**
- × **Do not accept an offer for lunch or other services. A cup of tea or coffee is OK.**
- × **Do not talk about anything other than the business. An opener about the weather is OK.**

1.5.1. *Non-buying prospects*

If you are convinced that the deal will not be closed in the conversation, but you still can see signs of interest, offer to return with another proposal tailored for the prospect's needs. This approach should be treated as a salvage plan since even if the next telephone conversation date is set, there is always a risk that the person may cancel it beforehand. If you can fix the next call's date and time for the next following days, you have significantly decreased that risk.

Having that in mind, if for any reason the next meeting for an undecided client does not lead to a sale (e.g. it is cancelled or the client is still undecided),Mana Immigration’s agents do not fix appointments for the follow-up meetings. Alternatively, the field agent will pay a visit to the client whenever they are in the area.

In the worst-case scenario in which you feel that the lead is not ready to buy and may never be a serious prospect, politely thank them for their time and offer to keep in touch. It is not a failure, but it helps you invest your time and effort into more serious prospects.

Do not forget that not closing the sale is not the end of the sales cycle. If the other person sees potential in Mana Immigration in the future, and especially if they find their competitors on Mana Immigration, it is very likely that they contact you. They would get back to you, only if you have left the image of a polite salesperson in their mind.

1.6. Closing the deal

Once the lead pays the first instalment, you need to take the following steps:

1.6.1. *Update the agreement link*

Open the lead's agreement link and go to this page AGREEMENT: PAY to update the payment details.

Item	Details	Example
SCH_RC_DATE_1	*Received date*	*2019-12-24*
SCH_RC_CAD_1	*Actual payment received in CAD*	*1000*
CAD_IRT_1	*Exchange rate*	*10500*
SCH_IRT_1	*Payment made in a million tomans*	*10.5*
SCH_RC_MST_EN_1	*Actual Payment Milestone*	*Upon Signing the Agreement*
SCH_RC_METHOD_1	*The actual method of payment*	*Actual Method of Payment*

1.6.2. *Fill in the Status form*

Click on the Status form link and enter the details.

In particular, pay attention to the following details:

Item	Details	
KEY_STATUS		*Get it from AGREEMENT entry*
ADM_DATE_LAUNCH	*Admission process date*	*The day’s date if STPU, STPS, STTR*
FILE_STATUS		*The deal, when Lead converted to Client*
FILE_DATE_LAUNCH	*Filing process date*	*The day’s date for other than STPU, STPS, STTR*

ADMISSION_AGENT	*Leave blank, if unknown*
FILING_AGENT	*Leave blank, if unknown*
PROCESSING_AGENT	*Leave blank, if unknown*

1.6.3. Save the receipt

Create a folder for the client in the receipt folder and name it in the following format:

SMITH_John_TRV

And save the receipt using the following name format:

Item	Example
YYYYMMDD_XXCAD_XXMT	*20191224_1000CAD_10.5MT*

1.6.1. Inform the manager