Sugar Sales
Last updated 12/5/2022

Call Fields

When to log a call: When there is contact that you think would be interesting/useful either to yourself or your colleagues at a future date.
- One call per incident, even if it takes one or two call-backs to have the discussion.
- Log all follow up action in one call record(e.g. sent a demo, sent rate sheet/proposal, etc.).
- Create one call record for multiple products unless there is very different information about each.

Where to log information: In the name record for the prospect (Organization>Name>Call).

Subject (up at the top, easy to miss): A brief synopsis, i.e. Marketing Services Outreach. The name of the product isn't necessary because that's another data field, but it's helpful.

Start Date, Time, End Date, Time: Autopopulates; change start time as need be, ignore end time.

Related to: Should autopopulate with the appropriate organization; don't try to edit.

Contact Duration (Minutes): Estimate the amount of time on the call.
- 1 min for no VM, 2 min for VM, etc.
- The time it takes to compose an e-mail

Contact Type: How you spoke with them. Use "Other" for face-to-face interactions.

Description: what went on in the call/conversation/meeting etc.
- If a phone call, write your phone notes as completely as you have them. If an e-mail message, it's fine to copy and paste your email exchange into the field. The more detail the better.

Contact Product: Which product the call was associated with, i.e. Planned Giving Manager

Direction: Who gets credit for reaching out
- This is based on initiation. If you call and leave a VM and the prospect calls you back, it's outbound. If the prospect initially calls, even if you then call them back, it's inbound.

Contact Category: Use sales unless the nature of the call was something service related.

Assigned to: The person who took the call
- If you are logging the call for another person (s)he will get an e-mail based on our workflows.

New Sales Stage: Only use if the call precipitated a change in sales stage, i.e. you finally had an actual conversation and this moves an opportunity from pursuit to needs assessment or you sent a proposal and so the opportunity shifts into proposal.

Opportunity Fields
When to create an opportunity: When follow up by PG Calc is expected, within 1 year.

Where to log information: Under the point prospect's name (Organization>Name>Opportunity).

Opportunity Name & Organization Name: Should autopopulate. Don't try to edit it.

Expected Close Date: The day you expect everything will be finished regarding the opportunity. This will autopopulate to three months out. This date is used for pipeline analysis and should be changed during the process to reflect information as we get it, and should always be after the Tickle Date until actual close. When the opportunity is closed, this field should be changed to that date so we have record of the close date.

Description: The specific details of the opportunity. This is a description of what the client needs and the specific products/services defined in our own language and including atypical pricing. Pls. include the following when applicable:
- Price (including discount) if quoted
- Software: date when trial was issued and how many copies of the software are needed
- Marketing: what the scope is of what we're trying to sell
- Gift Admin: what gift types/how many(e.g. CGAS, CRT, PIF), if they need ACH and which bank has the assets
- State Registration: which states
- Project or Retainer Consulting: description of need

Product: This is a drop down of products we have, with some broader categories. Go with the correct category even if it isn't the exact product (GAM is PGM).

Tickle Date: The date when you need to act. This will appear in your Tickle Report and is typically around 2 weeks out.

Sales Stage: Adjust as the sale moves along
- 1. Pursuit: When you're trying to get together, whether they've reached out and now you're scheduling, or you've reached out and are waiting for them to respond.
- 2. Engaged: This is for prospecting opportunities only. This is when they've responded and are interested, but a full conversation hasn't happened yet.
- 3. Needs Assessment: The standard starting place once a conversation has happened or a software eval has been sent. Still figuring out what they need/where opportunities live until the following stages occur.

- 4. Problem Education: Prospecting low value opportunities only. This is when you're explaining to them what they don't know about how planned giving works. Rarely used.
- 5. Demo: For MS, this is specifically a demonstration of what we do with Andrew or Gary. For software, it's attending a software orientation. For the others, it's a detailed, full conversation about what we do, often with example reports shown on screen.
- 6. Solution Education: For prospecting only – educating the prospect on what they don't know about what they need. Rarely used.
- 7. Proposal: They've been sent a formal proposal or specific pricing for the opportunity.
- 8. Agreement: We've sent paperwork, including an agreement. This step generally doesn't exist for software unless they want edits to the clickthrough. The next step from here is closed unless something happens such as a change of personnel on their end, or a change of heart, or a long delay.
- 9. Closed Won: congratulations, we got their business.
- 10. Closed Lost: The opportunity has closed, they chose to go with a competitor or do it themselves.
- 11. Closed Not Now: Any other loss, whether it was because the person we were working with moved to a new location, if they've decided to try and do it themselves, etc.
- 12. Closed Missed: the sale was missed through a fault of our own, usually by not keeping track of tickle dates and not following up.
- 13. Closed Never Started: Wasn't really an opportunity. This is for people who request a demo or conversation, but never respond to scheduling requests, etc.

Tickle Comment: The next course of action, your refresher for what to do next.
- "Call for more information." "Follow up on trial." "Ask DAW about status." Etc.

Likely $: Enter the *closest ballpark* amount specific to that product, i.e. PGM with an additional copy: $2,575. Remember what's in the description, including atypical pricing. The probability of winning this opportunity does not affect Likely $, it is the likely amount of the actual invoice. Our base assumption for each product is below.
- PGM: $2,040; GAM $585
- GiftWrap: $2,000
- Gift Admin: $3,500
- Marketing Services: $5,600
- Bequest Manager: $1,000
- Consulting: $6,500
- Webtools: $690
- Endowment: $2,000
- State Registration: $4,500
- Annual Filing: $4,500

Probability: This is the measure of how likely we are to win the sale. This is very important, it's okay if you guess, and it should change as the sale progresses, increasing or decreasing after a demo or proposal. Probability should never be 100%. When starting, we typically use 10% for

explicit opportunities and 5% for prospecting unless we know something that makes us think it's more likely. This does not change the likely $.

Lead Source Category/Lead Source: How did the prospect hear about PG Calc? These are crucial fields—be thoughtful with your entry. Please use the "other" sparingly and elaborate in Lead Source Detail.
- Marketing: they got a postcard, an email, or something else that directed them to us.
  - Conference
  - Direct Marketing
  - HubSpot Request (typically from the website, keep an eye out if they were directed to hubspot by DM)
  - Website
  - Inbound Call/Email – they called the sales line or emailed info and we don't know otherwise.
  - Other
- Prospecting: cold calls/emails
  - Outbound Call
  - Outbound Email
  - Turned Conversation
- Referral: Someone told them about us
  - Internal – someone at PG Calc sent them to Sales.
  - External – someone not at PG Calc sent them to us.
  - Self – they know us from something else, whether that's another product or a previous organization.

Lead Source Detail: This is free text and can help with future analysis or thank yous (e.g. which conference, who made the referral, which direct marketing piece).

Customer Type: This dropdown has four entries
- Client of this Product (Reinstating or Upgrading): This is used for upgrading (i.e. Gift Admin for CGAs are adding PIF), GiftCalcs considering *Marketing Services*, *GAM* looking at *PGM*, and reinstatements.
- Client Organization: Adding a new line of business to an existing customer, e.g. marketing services for a *PGM* client.
- Prospect Organization: If the organization exists but hasn't bought anything from us.
- New Organization: If you just setup an organization to make this opportunity.

Assigned to: Generally, this is the person who is responsible for the follow up. If you setup an opportunity for someone else, or change the assignment at any time, an email will be generated and sent to that person.

Demo: Date of face-to-face demo/software orientation/conversation.

Opportunity Created: This date field is automatically populated when you create the opportunity but it is editable (change it to be accurate when you are behind in data entry).

Won/Loss Reason: The reason for loss is important. Why didn't we get the sale? Won reason is less important.

Competitor Profile: Do we know who is doing their marketing/admin/software currently?

Software Due Date: When will their eval expire? Helpful to be able to reference when doing follow-up.