

HQ Sales Concierge + HQ Performance Framework

Role Description | SLA

Sales Concierge Role Objectives

The role of the Sales Concierge is to hunt, capture, qualify, nurture and quote all enquiries and potential sales opportunities.

The Sales Concierge will execute a custom designed sales process, developed by HQ in conjunction with the business team. (The Performance Framework) The aim of the sales process is to maximise revenue efficiency.

Key objectives of the sales process include:

- Sell. Advise potential customers in respect of business features & benefits
- Quote. Assist and inform enquiries, providing detailed information
- Present the business team with a rich supply of qualified opportunities



Sales Concierge Role Requirements

- ☑ Respond to every enquiry within 60 minutes
- ☑ Hunt for leads and opportunities from web visitors and subscribers
- ☑ Capture all enquiries in the CRM (HubSpot)
- ☑ Score and qualify all leads while identifying and recording specific needs / opportunities
- ☑ Establish purchase decision timeline, determine next action sequences
- ☑ Daily call, email and follow up of leads through a 12-week nurture cycle
- ☑ Provide information and support on all products or services including pre-requisites and Ts&Cs
- ☑ Quote and send customer requirements
- ☑ Schedule and refer all sales opportunities to the appropriate staff member (where required)
- ☑ Monitor the progress of all leads, remind & reschedule any uncompleted staff actions
- ☑ Report key measures

Performance Requirement

The function of the Sales Concierge role is to implement the HQ Performance Framework in accordance with the Role Requirements and Standards.

The HQ Performance Framework comprises a range of materials and tools which are developed by HQ and embedded as an asset within the infrastructure of the business. (see page 3)

Performance Standards

Every enquiry must be emailed and called by phone (subject to phone number availability) within 60 minutes of making contact every business day.

At the close of each day;

- All leads scored and categorised into appropriate nurturing action sub-groups
- All scheduled sales calls & nurturing tasks completed and up-to-date
- All opportunities scheduled for a sales presentation where required

All leads will be nurtured for twelve weeks, through a program that will include at least six contacts.

The Sales Concierge may attend online or phone sales meetings and, in any event will monitor outcomes by following up with the prospect and setting next actions within seven days of the meeting.

The Sales Concierge will achieve the Key Performance Indicators (KPI's) as established for each business.

HQ Performance Framework

The HQ Sales Concierge requires a Performance Framework in which to operate. The [HQ Performance Framework](#) functions on the principle of continuous improvement.

*“You can’t buy performance;
you must build it each day.”*

The pillars of the framework are People, Process, Technology (PPT). The key elements of the framework are information and tools; structured to create an integrated sales process that delivers a connected customer experience.

The starting point is creating a Sales Playbook; a range of information and materials to manage customer enquiries. Over time the playbook develops to become a business knowledge base for customer onboarding, support and self-serve solutions. The second element of the HQ Performance Framework is the sales tools.

Sales Playbook - Knowledge Base Materials

The Sales Playbook materials include presentation documents, brochures, eBooks, communication templates, emails, FAQ's and scripted responses. The necessary information is sourced through the business team. HQ will then redevelop and format the information to create and curate a living knowledge-base, embedded in the business, easily accessible to all staff, prospects and customers.

Sales Tools - Technology

The sales tools used by the Sales Concierge include a range of cloud SaaS platforms as well as custom developed applications. These include an online pricing calculator and quote system, as well as automated communications, sequences, chatbots and integrated workflows. Specific applications include:

- HubSpot - Sales & Marketing platform CRM
- Unified Communications
 - Chat
 - Messenger
 - Integrated email & text
 - Video Meetings
 - Phone
 - Contact Forms
- Chatbot – user activated, intelligent lead capture & customer support
- Hunter – Lead generation, identification data forensics
- Automated Workflow & Sequences
- Automated Custom Pricing & Quoting
- Integrated Social Media Response Management
- Google Analytics & B.I platforms

Custom Integrations & Applications

The HQ Performance Framework includes implementation of leading sales and marketing technology which is essential to achieving a connected customer experience.

Unified communication is about engaging customers on their terms, through the channels they select. All touch-points must be integrated through one management system. Website contact forms, advertising landing pages, online chat, Facebook Messenger, text, email and phone will all be integrated through HubSpot. (or client CRM depending on system capabilities)

Lead identification tools will be integrated within the business website so all visitors can be identified, either for direct contact or retargeting through display advertising.

Sales meetings, whether by phone, video conference or face to face, are coordinated through integrations between Outlook or Google Calendar, Zoom or Google Meet, and HubSpot.

The HQ Sales Concierge will have live access to the calendars of key sales personnel, to check and schedule their availability for meetings.

The cost of standard integration is included in the Performance Framework. Most of the software applications proposed offer a free access level, which covers the initial functionality required. As the Performance Framework develops, additional opportunities will likely warrant some technology investment to gain access to increased features and functionality.

The Custom Pricing and Quote system price is \$2,795 + GST.

If further or ongoing systems or data integration and transition is required, HQ Digital Operations services are available at \$2,000 per month.

Role Capacity

The value proposition of the role is achieved through high velocity sales efficiency; executing the Performance Framework in a structured environment. The base rates are anticipated to meet the requirements of approximately 90% of small to medium enterprises. (single outlet, brand or product division).

The HQ team bring twenty years' experience in front line, first response sales and marketing implementation, delivering national campaigns for global brands.

Pricing is confirmed following a detailed analysis of business requirements.

All performance standards will be met in accordance with the service level agreement. The objective of the performance framework is to drive continuous improvement and growth. As and when demand exceeds capacity, HQ will maintain the performance standard as offered, and give ninety days advance notice for any requested resource increase.

Team Engagement & Performance Management

The HQ Sales Concierge must operate as a closely integrated team member. Lines of communication will be established to ensure the Sales Concierge has access to the right people, at the appropriate times, to access information and discuss live opportunities.

People's time must be respected. Spontaneous calls will be kept to a minimum. Ideal communications will be via a team message system or email, outlining the topic and potentially scheduling a quick discussion via phone or video meeting.

Where feasible, the Sales Concierge should aim to visit the business office once each quarter, to have a general team catch up. Topics will include product / service developments and feedback on frontline enquiries being presented by prospects and customers. While sales performance is always on the agenda, the catch up is envisaged as an informal discussion which might be held over a lunch or breakfast meeting or open forum environment.

Any performance reviews or discussions will always be directed through HQ management. In the event that performance does not meet expectations, HQ will review the process and outcomes being achieved. If we are not achieving the target outcomes, we amend the process. If the person is not delivering the process, we address the actions of the person.

Reporting

Performance status is available at all times in HubSpot.

Where an integrated digital reporting dashboard or business intelligence platform is implemented in the business, the Sales Concierge will ensure data across all agreed sales measures is accurately represented and reflects all current activity.

Where required separately, the Sales Concierge will produce both a weekly and a monthly report that summarises all agreed sales measures.

[Note: Live reporting dashboard can be implemented as part of the HQ Digital Operations service]

CompanyHQ

CompanyHQ's mission is to provide: *"an exceptional customer experience"*

Our vision and values are built around four pillars:

TRANSPARENCY - one source of truth

TALENT - achieving exceptional outcomes

TRANSITION - continuous improvement

TECHNOLOGY - a connected experience