



Sales Etiquette Protocol

This protocol is in place to clearly define ownership of sales. The following are the guidelines to determine ownership of a sale:

1. In cases where a lead is not sold at the time of the call, the lead is not owned by anyone and is available for anyone to convert.
 2. In cases where a sales agent has noted the lead with a callback for the purpose of processing the sale at specified future date and time, the callback is good for 24 hours from the time stamp when the callback was entered into Agemni unless the agent types a note with a specific date and time clearly noted in the account. The Call Back note must follow these parameters:
 - Note the correct price and promotion that the customer was quoted.
 - Note the exact time and date that you are calling the customer back and the reason why the customer is being called back (Example: customer waiting on husband to get home with credit card will call back on Date/ Time.)
 - Customer must have the intention on placing the order upon the callback.
 - Note must be detailed to what needs to be done to actually convert the sale and cannot be coded or abbreviated.
 - The equipment configuration, package & monthly cost, and the upfront fee must have been explained to the customer and noted as well.
 3. In any case where the customer calls back to place an order, the order is up for anyone to convert unless rule #2 is being violated. In that case the call must be turned over to the agent or the sales manager on duty.
 4. If you are absent or off for any reason the lead is available for anyone to convert regardless of any callbacks that have been setup. Rule #2 will not apply in these cases. In cases where the agent is present, but not available because they are on lunch or break, the customer must be sent to the sales manager.
 5. If an account is noted and ready to be converted on a set day that sales must be converted by 11:59pm EST on that date. If it is not any agent can convert the sale and receive full credit for the sale.
 6. Agents cannot put a callback on a lead without actually speaking to a customer.
 7. If the sale is returned back to a lead the original sales agent has 24 hour from the Agemni time stamp to get it fixed and reconverted. If the sales agent is not able to get in touch with the customer they must note the account and be able to prove that they are following up on the lead. If the lead goes over 24 hours of the time stamp without any notes from the original sales agent, that agent will lose ownership of the lead and anyone can fix and reconvert.
 8. If a sale is in question a callback should be sent to the sales department manager. The sales manager only will make a fair decision as to ownership of a sale. Do not attempt to resolve these disputes with other sales agents directly. If you do not follow the proper channels you will lose credit for the sale automatically.
- Please remember that we keep detailed logs of every call that is placed in and out as well as recordings of all calls. If necessary we can and will use these measures to determine if this protocol has been violated.

I have read, fully understand, and agree to the Sales Etiquette Protocol.

Signature

Date

Print Name