**Policy:** The Firm’s policy is to memorialize its Sales System so that the sales process is: (a) replicable, and (b) sharable among staff. *This Policy serves as a Training Manual for incoming Sales staff*.

**Procedures:**

A. **Personnel**

1. Non-Attorney Salesperson – Client Development Manager (also known as “NASP”).

2. Non-Attorney Salesperson – Client Development Associate (or “Sales Associate”)

B. **Job Descriptions & Written Interview**

1. **Job Description, Non-Attorney Salesperson – Client Development Manager**.

2. **Job Description, Non-Attorney Salesperson – Client Development Associate**.

3. **Written Interview for Sales Manager or Sales Associate**. This serves as a written interview as a first layer of review of candidates by the Firm.

C. **Hiring & Onboarding**

1. **Recruiting**

a. Owner will post Job Description for Sales Associate on Upwork. Owner can include NASP in the Upwork process of reviewing and vetting the candidate.

b. If candidates are interesting, email the Quiz/Questionnaire (see *Job Application - Quiz for Sales Manager or Sales Associate*). Sometimes we call this a Written Interview.

c. If responses are “A,” as determined by the reviewer within the Firm (the Legal Administrator together with the NASP), then then NASP will perform 1st interview per our Interviewing PSP. See *People—Screening Interview*.

d. If candidate is an A Player, then NASP can forward the interview summary to Owner.

2. **Who will Hire & Onboard**

a. Hiring—Owner will do via Upwork.

b. Onboarding—Owner and NASP will do.

i. Sales Associate will focus on 90-day-plus post-LSS calls, per the Post-Engagement Glide Path.

ii. NASP will continue to focus on Intakes, Retainer, and 2-, 7-, and 20-Day calls as specified in the Post-Engagement Glide Path.

3. **Communications (Phone)**.

a. Our office line is 310-844-3173 (the “Main Office Line”). It is a Verizon phone which is in Owner’s name (or the Firm’s name) and the physical phone is kept by our NASP.

b. Owner’s cellphone is also on the account with Verizon.

c. We will get a 2nd office number with Verizon (“2nd Office Line”). We will order a physical phone for this 2nd office number and the physical phone will be kept by our Sales Associate.

d. Our NASP will leave a Voicemail message on the 2nd Office Line which will be identical to the Voicemail message on the Main Office Line.

e. Sales Associate will give NASP the password to access voicemail from the 2nd Office Line.

f. COO has made a suggestion that calls be “rolled over” or forwarded from the Main Office Line and the 2nd Office Line, the reverse; this way, callers get a live human being who is a representative of the Firm, and if that person wants to the call to go to the other Sales staff member, they can make this happen (i.e., by taking a message saying something like, “Ebony will be back within 2 hours and call you then; what number should reach you at?”). Presumably it is better for the PNC or Client to reach a live Sales person than voicemail.

Our NASP recommends that:

1. If the PNC or Client calls the Main Office Number and NASP is not available to pick up, the message goes to voicemail. This way, NASP can return the call and the voicemails are on the phone and this is easy for NASP to manage.

2. If the PNC or Client calls the 2nd Office Line and the Sales Associate is *not* then available, then, we can have *call forwarding* implemented so that the call forwards to the Main Office Number. At that point, NASP will seamlessly pick up. If, however, NASP is unavailable, then the call will go to voicemail on the Main Office Number. NASP can then direct the call to the Sales Associate (e.g., the phone itself, within the voicemail function, normally allows the user to forward the voice message).

4. **Reporting**.

a. NASP will advise on report forms available via CRM.

b. NASP will also use the PSP, *Sales Report to Owner* (or such other form as COO designates) as a master daily and weekly reporting form. See # 5 below under C. *Onboarding & Training Resources*.

5. **Cleaning CRM**. NASP will ensure that:

a. “Hired” Pipeline in CRM reflects the Post-Engagement Glide Path categories for customer “touches” (2-days after LSS, 7 days, 30 days, 90 days, 180 days, Annual) as well as the following necessary columns:

i. Scheduled LSS

ii. Need Follow-Up on Retainer Request

b. The “Hired” Pipeline is “cleaned” with respect to post 30-day touches, so that the Sales Associate can be effective. Cleaning includes tagging the RP (Retainer Paid) status and making sure the clients are in the right column in the Dashboard.

c. The Firm purchases an additional CRM login for the Sales Associate(s).

D. **Onboarding & Training Resources**

Below are the most important PSPs for our Sales System.[[1]](#footnote-1) All Sales staff should: (a) print out, (b) read, and (c) master these PSPs; and ask NASP first, and as a next level, Legal Administrator any questions.

1. **Job Responsibilities**

**Job Matrix—Responsibilities of Salesperson After Hire**. The principal duties, per this PSP, are: (A) Contact Active Clients for follow-up and input or mark accordingly in CRM; (B) Call Dormant Clients in this priority: (1) clients marked yellow or red in Asana Active Clients; (2) clients with existing positive Retainer balances (i.e., who have money in their client-trust account); (3) scheduled 2-, 30-day and later follows-ups. Use the appropriate follow-up scripts as laid out in the PSPs. While most of this is for the Intake through 1st or 2nd Retainer, it is also relevant as a review for all Sales personnel.

**Sales: Training Videos**. These short training videos show how to use our CRM.

**Client Interaction & Calendaring**. Phone etiquette, use of conference line, handling a variety of calls, etc.

2. **Mindset and Scripts**

**Sales Manual**. Provides scripts for Intake Calls, Handling Objections, and Follow-Up Calls.

**Sales—Team Sales Training (4-6-18)**. Sales training of Team including Attorneys.

**Before the Legal Strategy Session** and **Checklists & Scripts for the Legal Strategy Session**. These document are for Attorneys, yet useful to Sales Staff so Sales Staff can see the way that Attorneys incorporate sales scripts and messaging.

3. **Intake/Pre-Screening of Prospective New Client (PNC)**. The Training Videos, above, are particularly helpful here as this set of processes involves heavy use of the CRM.

**LSA and Advance Required Prior to Legal Strategy Session**. This describes the requirement that the Client must remit payment prior to receiving legal services.

**Conflict Checking and Obtaining Required Waivers**. This describes our Conflicts procedures including both checking conflicts with new clients and check conflicts against existing clients.

**Screening, Scheduling and Preconditioning a PNC**. This describes our system of screening PNCs and our intake process.

**Opening a New File for a New Client & Updating CRM**. The Training Videos, above, are particularly helpful here as this set of processes involves heavy use of the CRM.

4. **Follow-Up with Clients**

**Opening a New File for a Current Client**. As self-described but rarely used.

**Post-Engagement Glide Path**. Once the PNC has become a Client, we follow up regularly with scheduled calls:

* 2 days after the LSS
* Within 7 days after the LSS
* 30 days after
* 90 days after
* 180 days after
* 360 days after and Annually

Each scheduled call has its own purpose and script. Refer back to the *Sales Manual* for items such as additional scripts and handling objections. The follow-up Sales Staff person focuses, obviously, on the designated follow-up calls.

**Updating CRM for Client Follow-Ups**. This deals with updating the CRM for follow-ups; and also see the Training Video.

5. **Reporting**

**Sales Report to Owner**. This is a report from the Sales staff person on the # of scheduled Legal Strategy Sessions, Conversion Rates, Advance, and # sales made on the 1st vs. 2nd vs. 3rd call; and a request for Owner action/decision.

Client Development Manager (NASP) should use the report weekly to report to Owner.

Client Development Associate should use the report daily to report to Client Development Manager, and weekly to Owner.

1. There are additional PSPs which we have not yet formally implemented, such as for example, *Sales Meeting & Ongoing Trainings* (we will handle trainings in other ways as we continue to scale). [↑](#footnote-ref-1)