SOP - Disqualifying a Lead

1. If the lead is disqualified, you will need to customize the general disqualification message to fit the specific reasons for this lead. Below, find an example of this email:

Hello [first-name],

Thank you for your recent submission. I am hoping to gather just a little more information from you regarding your needs as well as provide more information about RightFax to ensure it is the perfect fit for you.

As an enterprise-level software, RightFax is best suited for organizations that see a high transmission of faxes or a minimum of 500 of fax pages per day. Starting at about $8,000, RightFax provides flexible integrations to seamlessly incorporate fax into all existing document delivery workflows.

I see that you are a bit below the typical fax volume threshold for RightFax. Just to clarify:

Would you still like to move forward with receiving a RightFax [quote / demo / upgrade]?

If so, please respond to this email and I should be able get you in touch with the appropriate group at Advantage.

Best,

Name

Job Title

Email

1. Login to Dynamics CRM
2. Go to Marketing > Leads
3. Go to the lead record
4. Under the “Lead to Opportunity Sales…” bar click “Related”

A picture containing graphical user interface

Description automatically generated

1. Under “Related: Common” click “Activities”

Graphical user interface, application

Description automatically generated

1. Click the arrow for the “New Activity” drop menu

Graphical user interface, application

Description automatically generated

1. Select “Email”
2. From here, paste the disqualification email and update the Subject line to say:
   1. Subject Line: RE: RightFax [Form Name] Request – First Name & Last Name
      1. Example: RE: RightFax Demo Request – John Doe
      2. When ready, click “Send” on the left side of the top bar.

Diagram

Description automatically generated with medium confidence

* + 1. Update the record in CRM with all required information including the following:
       1. Status: Contacted
       2. Rating: Cold