



Getting Started Module 4- New Client Walkthrough

A Sale is Made

► Sales Rep Sally, has had a successful meeting with Joe at Joe's Pizza - Joe would like a half page ad in every issue this year!



Step 1: Rep Emails CEA

The first thing Rep Sally will do is email her CEA Stephanie to let her know she's made a sale.

Email Must Contain:

- ▶ Customer contact information
- ▶ Any ad instructions/ad elements given to Rep by Customer
- ▶ Negotiated offers
- ▶ Any pre-set expectations (best time to call, overall expectations)
- ▶ Next steps to connect CEA to customer – call/email introduction

Additional helpful info:

- ▶ Description of business, unique features, helpful marketing info
- ▶ Specific follow-up needed (image needs, missing files)
- ▶ Awareness of customer preferences, needs, tendencies

Bcc:

Subject: New Sale - Joe's Pizza

Stephanie,

I've sold a new account, Joe's Pizza. He is going to do a half page in every issue this year! Here is some important information about the sale:

- Contact info: Joe Smith, phone number 888-456-7890, email joe@joespizza.com
- Ad instructions: Joe mentioned wanting one nice big image, see his website www.joespizza.com for other information to include.
- Negotiated offers: \$2 off \$10 and \$5 off \$25
- Expectations: Joe prefers email communication
- Business description: this is a casual family style restaurant
- Joe has trouble hearing, please keep in mind if you need to call him

I'll send you and Joe an email now to introduce you.

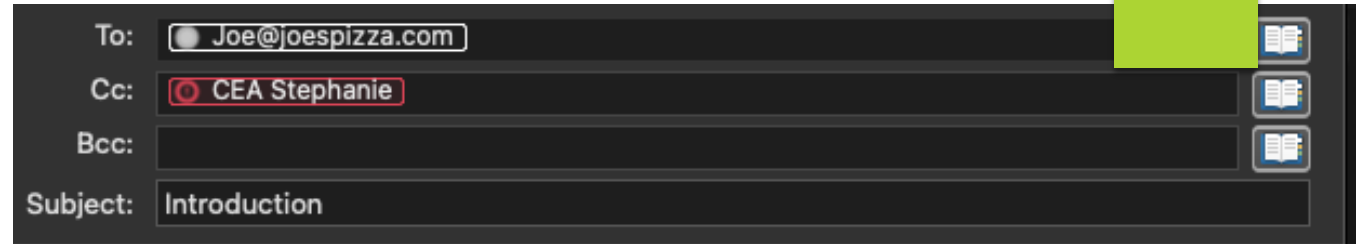
Thanks,

Rep Sally
Clipper Magazine
A Vericast Business
repsally@clippermagazine.com
Phone: 777-484-9965

Step 2: Rep Introduces Client to CEA

The next step is for Rep Sally to introduce Client Joe to CEA Stephanie.

- ▶ Create a bridge
- ▶ Build confidence
- ▶ Set expectations



Joe,

I'd like to introduce you to my creative support person, Stephanie. As we discussed in our meeting earlier, she will be your go-to person for all your ad creation needs. I've cc'd her on this email, and she will reach out to you shortly to get the process started.

I'm confident that your ad is in great hands with Stephanie and the production team!

Thanks,

Rep Sally
Clipper Magazine
A Vericast Business
repsally@clippermagazine.com
Phone: 787-989-4545

STEP 3 - CEA begins working with client

CEA Stephanie will contact Joe and begin the production process.

- ▶ Create an account wiki page to store client information
- ▶ Collect ad information and materials
- ▶ Discuss design needs
- ▶ Relay instructions to production team by entering ad copy into ATOL



Step 4: Ad Creation and Follow Up

- ▶ Ad goes to the production design team and an ad proof is created.
- ▶ The ad proof will be reviewed by CEA Stephanie and emailed to Client Joe.
- ▶ CEA Stephanie will follow-up with Client Joe to review the proof, assist in making changes to it, and/or approve it for print.
- ▶ Now that CEA Stephanie has a relationship with Client Joe, she will automatically begin working with him when it's time to begin next month's ad.



Welcome to
Joe's
PIZZA

Casual Dining • Comfort Food • Family Style

pizza, calzones, salads, garlic knots,
wings, desserts and more!

- dough made fresh daily
- vegan pizza available
- sauce is an old family recipe, made in our kitchen

\$2 OFF any purchase of \$10 or more

\$5 OFF any purchase of \$25 or more

JOE'S PIZZA
888-456-7890

JOE'S PIZZA
888-456-7890

35 Smithtown Pike • North Anderson • (888) 456-7890
We are located at the in the town center next to the grocery store and the pharmacy
Open Everyday 11AM-8PM • www.joespizza.com

With this coupon. Not valid with other offers or prior purchases. Expires 4-1-22. Go to LocalPlaces.com for more coupons.

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Sales Involvement Expectations

When CEA requests assistance due to:

- ▶ Needing help with client contact
- ▶ Troubleshooting client problems
- ▶ Selling/finance related client needs

Rep can request critical changes and avoid design changes.

- ▶ THIS: location information, incorrect/missing business info, negotiated offers, established client needs, relaying information provided by client
- ▶ NOT: aesthetic changes, moving elements, font/color/size/image changes etc. Unless it is essential for the success of the ad.
- ▶ Any design opinions requested will be evaluated and discussed with the client or a creative specialist when appropriate.

What if?

- ▶ **Joe calls Sally because he wants to change something on the ad**
 - ▶ Sally should encourage Joe to call Stephanie. If that's not possible, Sally should write down the changes and relay them to Stephanie.
- ▶ **Sally realizes that the phone number on Joe's ad is wrong**
 - ▶ Sally should call Stephanie right away to have it fixed
- ▶ **Sally doesn't like the colors used on the ad**
 - ▶ Sally can reach out to Stephanie to share her opinion, but should be aware that changing the colors will be determined between Joe and Stephanie
- ▶ **Joe tells Stephanie that he wants to upgrade to full page**
 - ▶ Stephanie will alert Sally so that she can reach out to Joe.
- ▶ **Joe is upset about the service Stephanie has given him**
 - ▶ Sally should reach out to her manager or to Stephanie's Team Leader
- ▶ **Joe tells Stephanie that he wants to remove all the coupons in his ad**
 - ▶ Stephanie will encourage Joe to not make that change. If Joe persists, she will contact Sally to intervene.
- ▶ **Sally notices that the main color of the ad is dark green. Joe specifically said he hates green on ads, but Sally forgot to tell Stephanie in her hand-off email.**
 - ▶ Sally should alert Stephanie, who will add it to the client wiki page.