

**Leads on the Phone**

**START:**

* Pull up this form: <https://www.fisherstech.com/leads-fcc/>
* Please complete the form with the call-in lead
* Reference the “Territories List” (red button) to check the Zip Code list and transfer the call to the appropriate Account Manager (try the Account Manager on their desk line and cell phone, if sending the caller to voicemail dial \* before extension for example \*XXX)
  + - If the Account Manager is not available and the caller is interested in IT Services, Document Automation and/or Phones, contact the department leader to see if they are available to take the call.
    - If they are not available, please let the caller know that the Account Manager is at an appointment and will return their call shortly.
* ***Note*** *– If the customer is out of our servicing area, assign the lead to Teresa Jorgensen. Marketing will pass the information along to Teresa Jorgensen & Justin Rex to investigate if this is a legit lead.*

**PROCESS INFO:**

* When form is submitted, it will automatically send an email to the Account Manager, Regional Sales Manager, and Marketing Team.
* If it’s an IT lead, this form will automatically send IT lead to Account Manager, Regional Sales Manager, [leads@fisherstech.com](mailto:leads@fisherstech.com), Jamie Williams, Josh Van Berkum, and Marketing.
* Marketing Team will enter all leads into Sherpa and follow up with the AM, RSM and IT Team/leads email if applicable.

**NOTES:**

* “Leads on the Phone” SOP is saved here: Common Drive:\SOPs\Marketing and Admin\Sales Support

For all non-marketing team members, STOP HERE. You’re done 😊

**Marketing Team Members**

Reference the SOP entitled “SOP Leads and Sherpa updates” located below for next steps.

* Common Drive:\SOPs\Marketing and Admin\Sales Support