

SalesCollab

Customer Engagement Model Forms

We serve business customers. How can we serve you?

Follow the three point plan

1. Seek the wisdom of God
2. Handle with excellence whatever God places in your hands
3. Give God all the glory in how we serve our customers and in how we serve one another

1. Services Business Unit

SalesCollab Consulting

For SalesCollab Consulting Team Members:

Step 1: Run 30-minute Discovery using structured questionnaire.

- Document: **SalesCollab Consulting 30 minute Discussion Customer Engagement Form**

Step 2: Discovery & Fit (free up to 30 minutes)

Goal: Understand context, diagnose at a high level, assess potential business value.

- Outcome A: No material value → politely decline and close.
- Outcome B: Identify strategic focus area(s) and assess fit.
 1. If fit → verbally explain recommended engagement format and investment.
 2. Immediately email:
 - Engagement & Commercial Guide
 - Document: **SalesCollab Consulting Commercial Engagement Model - Customer version**
 - Proposed strategic focus area and engagement format
 - Calendar link for next session
 3. Upon written consent → issue deposit invoice.
 - Work begins only after deposit confirmation.

Remember: The 30-minute call diagnoses the problem area. It never prescribes the solution. Strategy work is always paid.



2. Marketing Business Unit

For SalesCollab Marketing Team Members:

Step 1 Discovery & Fit: Run 30-minute Discovery using structured questionnaire.

- Document: **SalesCollab Marketing Customer Engagement Form**

Step 2 (Deep Dive): Use the applicable customer engagement form –

- a) Brand and Graphic Design needed
 - Document: **SalesCollab Brand and Graphic Design Customer Engagement Form**
- b) Website design needed
 - Document: **SalesCollab Website Customer Engagement Form**
- c) Social Media management needed
 - Document: **SalesCollab Social Media Customer Engagement Form**
- d) Lead generation funnel & CRM needed
 - Document: **SalesCollab Lead Generation & CRM Customer Engagement Form**

Step 3 Comprehensive Lead Generation & Marketing Automation solution needed

- Document: **SalesCollab Marketing Audit 30min Customer Engagement Form**

Goal: Understand customer's marketing requirement and business readiness.

- Outcome A: No material value → politely decline and close.
- Outcome B: Identify strategic fit.
 1. If fit → verbally explain SalesCollab Revenue Engine.
 2. Immediately email:
 - Document: **SalesCollab Revenue Engine Audit Form**
 - Calendar link for next session
 3. Upon written consent → issue commercial agreement & deposit invoice.
 - Work begins only after deposit confirmation.

3. Connect Business Unit

For SalesCollab Connect Team Members:

Step 1: Discover & Fit: Run 30-minute Discovery using structured questionnaire.

- Document: **SalesCollab Connect Customer Engagement Needs Assessment**

Remember:

- Never lead with a product or a price. Lead with a question. Our role is to act as a "Technology Butler" or "Business Concierge." We diagnose the friction before we prescribe the solution.
- Always mention Laptop Rentals and Hardware Finance options to help with customer cash flow.