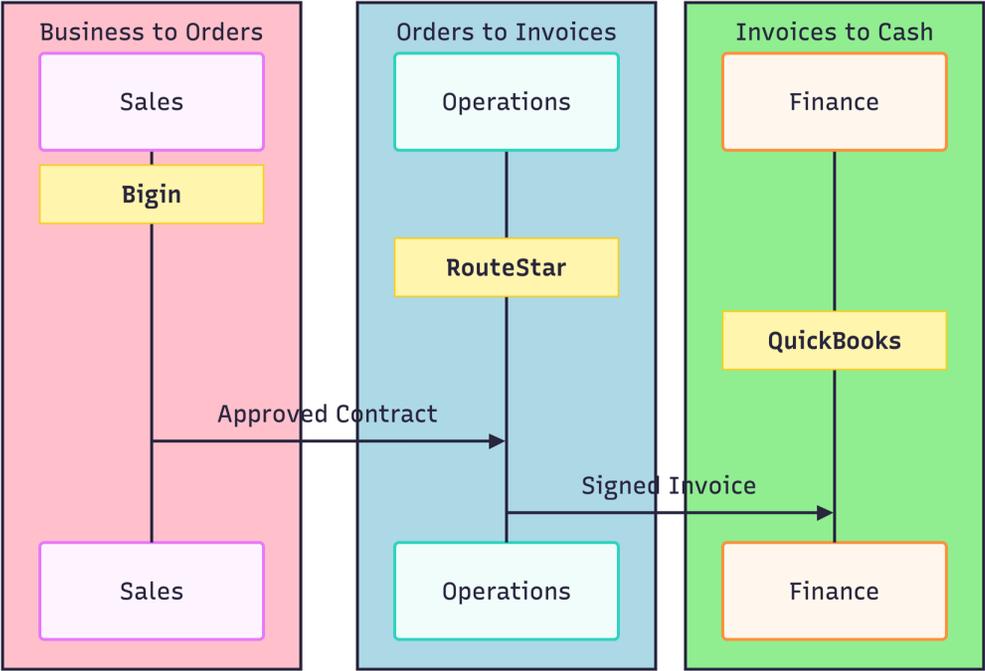# Bigin

Bigin 3 tiers (Company)

1. A company is the core entity it has employees (contacts) and active sale engagements (pipelines). Multiple ENVNVA employees engage with a company over years
   a. As staff changes in a business you might want to pick up where you left off months or years later. Ongoing conversation in your territory with businesses.
   b. You get audit results before you go in to a customer to know if there are any service issues. Can also generate audits though only Liza ever showed any interest.
   c. New salesperson might want to pick up an old discussion
   d. May want to engage with another branch that someone else sold (example Chick-fil-A rental agreement to offset costs)
   e. Operations and finance record issues with client example service failures or poor billing.
   f. If there are escalations to me I check Bigin first.
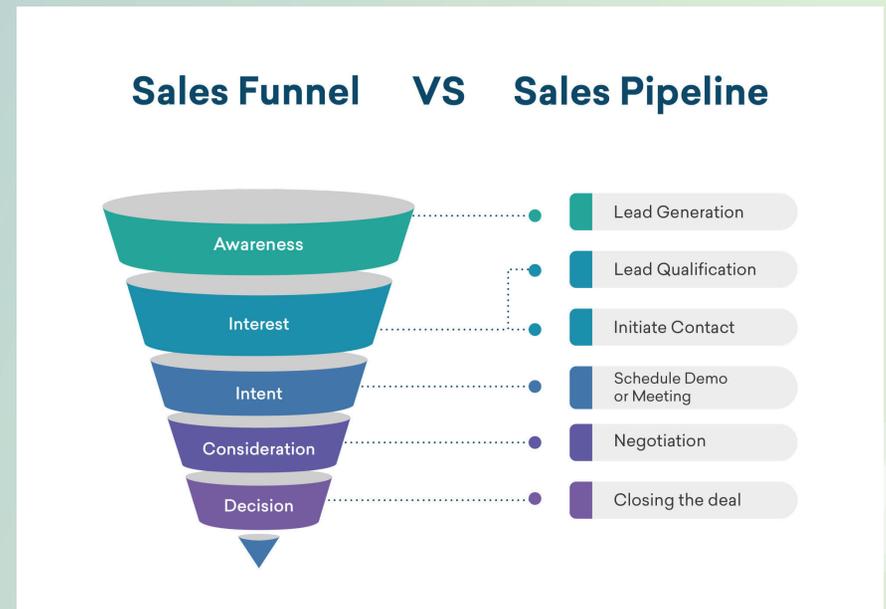   g. Etc...

How ENVNVA is structured (Company configuration)

Business to Orders	Orders to Invoices	Invoices to Cash
Sales	Operations	Finance
Bigin	RouteStar	QuickBooks
Sales	Operations	Finance

Approved Contract

Signed Invoice

Bigin 3 tiers (Contacts)

2. Contacts are people
   a. Emails are automatically retained and tied so someone else can follow what was said
   b. Notes about people and interactions
   c. Their role and reporting structure

Bigin 3 tiers (Pipelines)

3. A pipeline is a deal
   a. A pipeline can be an initial deal (generally a hunter) or an upsell (generally a CSM or tech)
   b. Details about negotiation so you can remember and others can follow what was agreed upon, desired, refused…
   c. When complete should have enough information to be able to be configured for initial service (Install) and possibly ongoing service (Sani Tech, Scrub Tech) – RouteStar
   d. Sales people want to be able to search deals to find similar customers (Wingstop and Chick-fil-A) and similar deals
   e. Get analytics and metrics

Sales Funnel   VS   Sales Pipeline
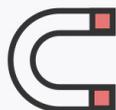
Sales Funnel stages:
- Awareness
- Interest
- Intent
- Consideration
- Decision

Sales Pipeline stages:
- Lead Generation
- Lead Qualification
- Initiate Contact
- Schedule Demo or Meeting
- Negotiation
- Closing the deal

6 Critical Benefits of CRM

1 Organized and Accessible Customer Data

2 Higher Conversion Rates

3 Increased Customer Retention

4 Accurate Data-Driven Decisions

5 Personalized Interactions with Customers

6 Time Saver

iContact

What we desire to be there

Goal is to slowly acquire more information. Collect and record continuously.

1. Company
   a. Location
   b. Phone number that gets answered by on duty manager
   c. Phone number and email for billing related concerns
   d. Parent company groupings
   e. Tags that are useful for filtering (Thais, Alex, Jeff)
   f. Notes about the company that someone interacting with them should know
   g. Master Companies: description of ownership of children
   h. Scope of services

2. Contacts
   a. Formal title
   b. Job duties
   c. Email
   d. Phone – best phone to use
   e. Email history
   f. Insights into their personality

3. Pipeline
   a. What is being discussed
   b. Tasks – who had to do what by when
   c. Calls – any calls
   d. Notes on meetings
   e. Events that are happening (multiway meeting that is scheduled, expected contract sign)
   f. Photos of the facility to assist discussion
   g. Products and pricing
   h. Agreements and drafts of agreements
   i. Final signed agreement and notes
   j. Task to go for Approval (out of sales)
   k. Information about install CSM – Alex to salesperson and task

We want to be sane about collection. Goal is to balance out how onerous the paperwork is with the value of good notes. 5 minutes after a 30 min meeting is a good use of time. 2 hours is not.