

RESPONDING TO INCOMING ENQUIRIES CHEAT SHEET

Your guide to handling customer enquiries and making sure that we are directing the right enquiry to the right team/person within Arborgreen.



Abbreviations

TM = Territory Manager
SC = Sales Coordinator
CST = Customer Service Team

Identification Checklist

Use HubSpot to check who the customer and company is.

1. Which company is the customer associated with? If they are not associated to one, check their account history and email domain to match it with any existing companies in HubSpot. If there is a clear match, please make the association. If you're unsure, please escalate to the CST Manager.
2. See the associated company to find the company owner and Ecosystem.
3. IF you are responding to a voicemail, look up the phone number/customer name to help you identify them.

UNSURE = ASK!

Opportunity Assessment Checklist

Use tools like Hubspot, Google, Claude or Chat GPT to learn about a company:

1. Do they have a company email address? (ie. not a personal email like gmail or hotmail). (Yes / No / Unsure)
2. Are they a CMA (Catchment Management Authority) or Local Land Service (LLS)? (Yes / No / Unsure)
3. Are they an Aboriginal Corporation or Traditional Owners Group? (Yes / No / Unsure)
4. Is there any previous or active conversations with a Territory Manager recorded? (Yes / No / Unsure)
5. Is it a company not currently in our Hubspot database ? (Yes / No / Unsure)
6. Is the order above **\$5,000** or inconsistent with what they have ordered before ?(Yes / No / Unsure)
7. Does the contact or company have a deal record of 10+ deals or \$10k+ total value? (Yes / No / Unsure)
8. Does the customer reference a particular product such as; Flex MSE, TerraCottem or Tree Coach? (Yes / No / Unsure)

If you answered Yes or Unsure to any of these, then these should be routed as an opportunity and a Sales Coordinator should be notified.

