

STREAMLINE AUTOMATION



Customer Relationship - Tasks, Hand-Offs and Documents

As customers progress through the sales cycle at Streamline Automation, there are a number of activities, processes and documentation tasks that need to take place. Each member of the Streamline team has to ensure that their part has taken place, and that the customer is being served.



- Contact new customers
- Follow up with customers in Sales Pipeline
- Co-ordinate in-house demonstrations and visits
- Review and Track Sales Pipeline with Salesforce®



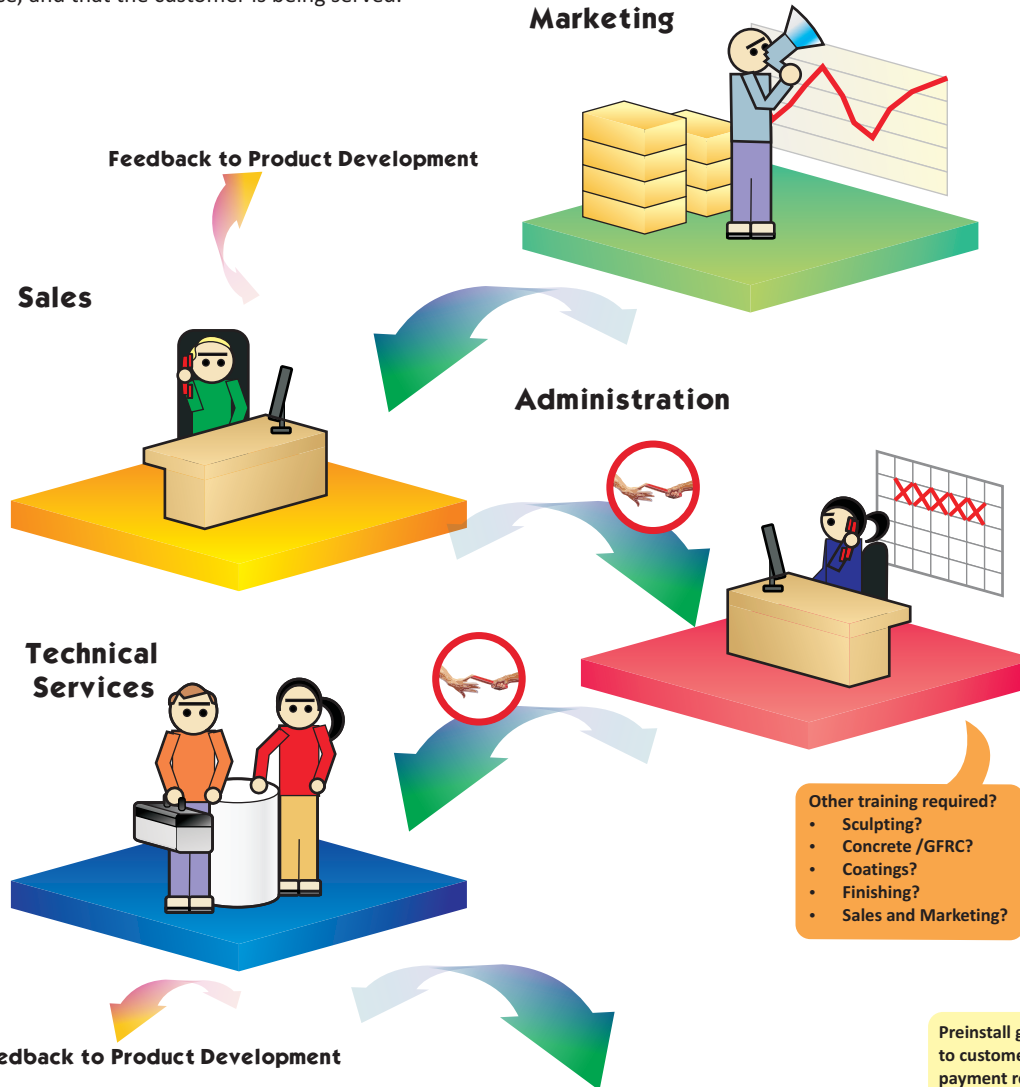
- Salesforce® data entry
- Product Data Sheets
- Corporate Presentations
- Welcome Package



- Train Customers
- Perform System Installations
- Conduct technical portion of in-house demonstrations and visits
- Demonstration Pieces / Job Shop
- Follow-Up Technical Support



- Sales support documents
- Pre-Training Phone Call
- Updates to PreInstall Guide
- Training Agenda
- Training Modules
- Customer Sign-Off Sheet
- **Install Report**
- FROGLog Tech Support entries
- Technical Updates



- Collect and compile customer lists
- Track data in the Sales Pipeline
- Create and launch campaigns to target new customers
- Follow up with Product Development to ensure Product sheets are up-to-date
- Create and update web content



- Salesforce® data entry
- Product Data Sheets
- Case Studies and Testimonials
- Marketing copy
- Web content



- Assist with Sales Quotes
- Help with arranging in-house demonstrations
- Co-ordinate with Customer for payment
- Arrange with Customer to book Installation and Training
- Co-ordinate shipments
- Help with associated small parts / additional items for installs
- Coordinate with suppliers for delivery of system components

- Other training required?**
- Sculpting?
 - Concrete /GFRC?
 - Coatings?
 - Finishing?
 - Sales and Marketing?

Preinstall guide sent to customer when payment received



- Sales Quote
- **Work Order**
- Customer Data in **FROGLog**
- **Preinstallation Guide**
- Shipping Documents
- Travel Documents (Visas, Tickets, Customs Letter, etc.)

Ongoing Training, Support & Follow-Up Sales