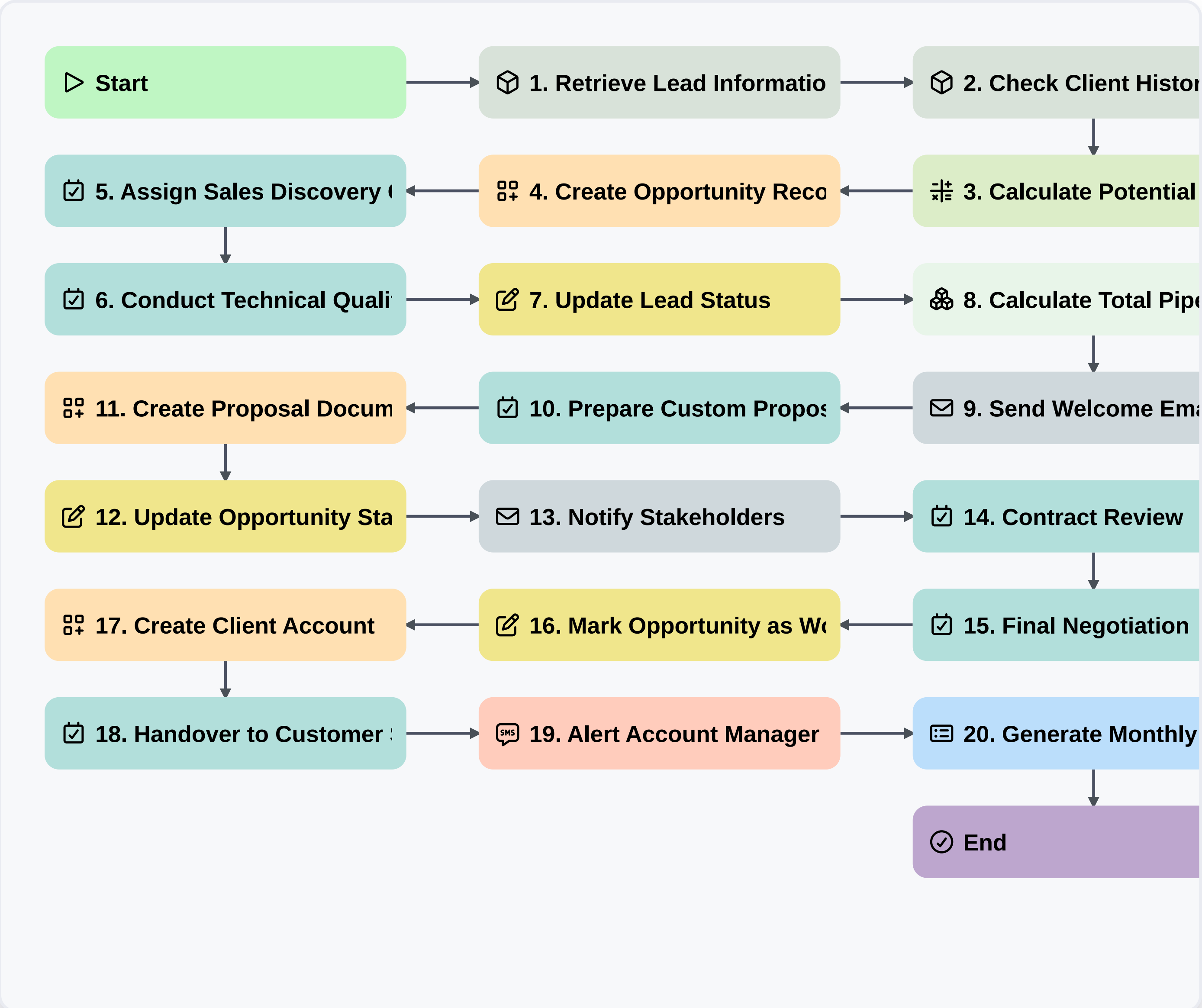
ChecklistGuro

New Business Intake Process



Start
Start of the Workflow/Process.

1. Retrieve Lead Information
Fetch the initial inquiry details from the 'Inbound Leads' data model.

2. Check Client History
Search the 'Clients' data model to see if the prospect is an existing customer.

3. Calculate Potential Deal Value
Calculate total revenue by multiplying 'Estimated Units' by 'Unit Price'.

4. Create Opportunity Record
Create a new entry in the 'Sales Opportunities' data model to track the new lead.

5. Assign Sales Discovery Call
Create a task for the Account Executive to schedule and conduct an initial discovery meeting.

6. Conduct Technical Qualification
Create a task for the Solutions Architect to review technical requirements.

7. Update Lead Status
Change the status of the original Lead entry from 'New' to 'In Qualification'.

8. Calculate Total Pipeline Value
Sum the 'Deal Value' of all opportunities in the 'In Qualification' stage.

9. Send Welcome Email
Send an automated introductory email to the prospect's contact email address.

10. Prepare Custom Proposal
Create a task for the Sales Manager to draft a formal proposal based on gathered requirements.

11. Create Proposal Document
Create a new entry in the 'Proposals' data model linked to the Opportunity.

12. Update Opportunity Stage
Move the Opportunity status to 'Proposal Sent'.

13. Notify Stakeholders
Send an internal email to the Legal and Finance teams regarding the pending proposal.

14. Contract Review
Create a task for the Legal Department to review the terms in the generated proposal.

15. Final Negotiation
Create a task for the Sales Rep to finalize pricing and terms with the prospect.

16. Mark Opportunity as Won
Update the Opportunity entry status to 'Closed Won' upon successful signature.

17. Create Client Account
Create a permanent record in the 'Clients' data model for the newly won business.

18. Handover to Customer Success
Create a task for the CSM to initiate the onboarding process.

19. Alert Account Manager
Send an SMS notification to the Account Manager that a new client has been onboarded.

20. Generate Monthly Intake Report
Create a summary report showing the conversion rate from Lead to Closed Won for the month.

End
End of the Workflow/Process.