

Sola Salon Studios - One-Stop Deal Discovery

This step-by-step guide walks you through the Deal Discovery section on the Lead Card. This guide will help you to capture key information during the Discovery process so you can have more effective and insightful sales calls. This is the standardized discovery framework for all reps to follow. This ensures consistent, thorough and actionable lead discovery.

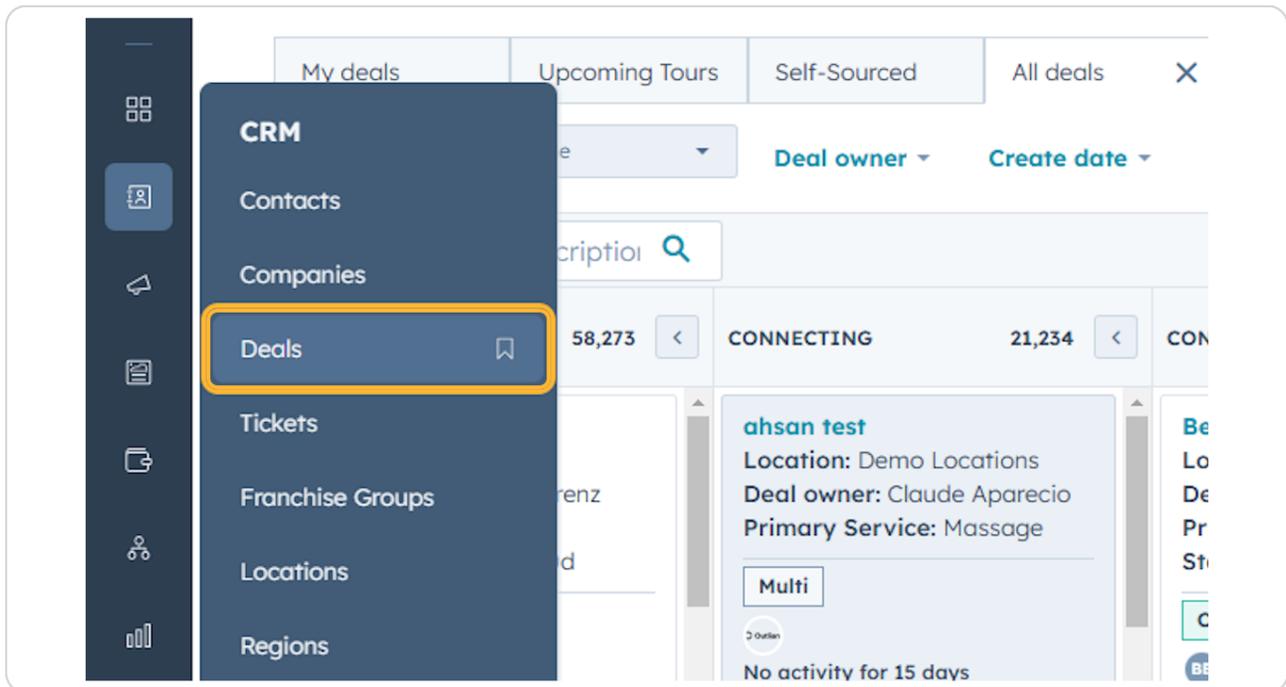
16 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
Doug Davidoff	Nov 15, 2024	Jan 23, 2025

STEP 1

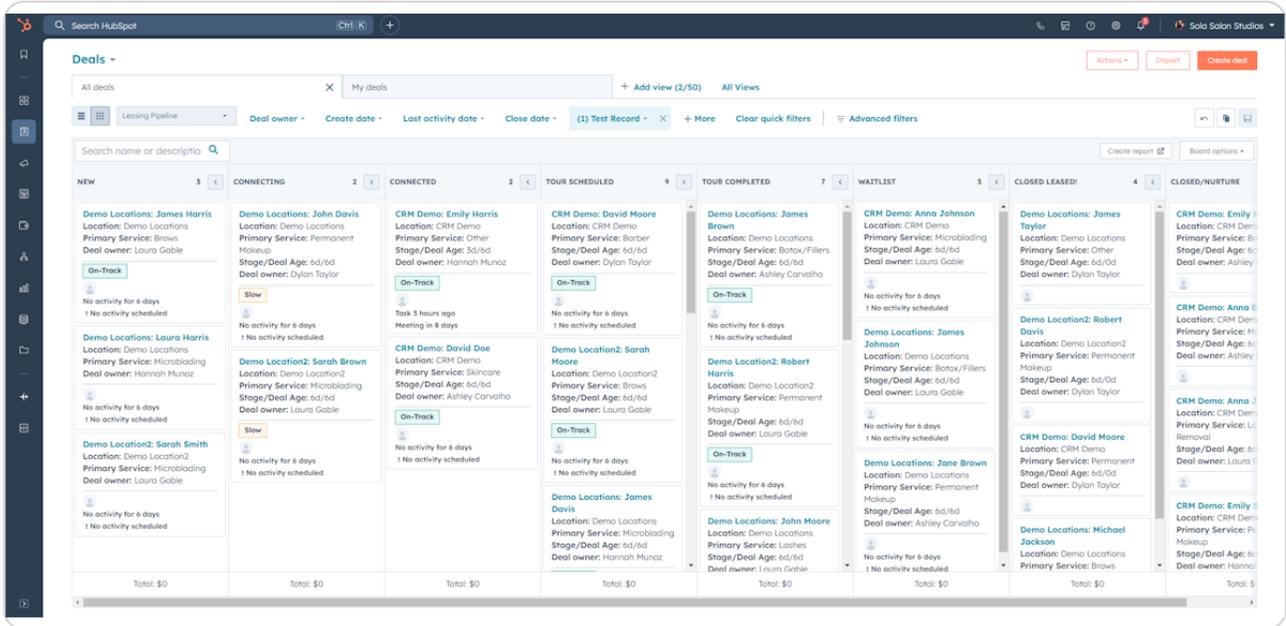
If you aren't already in Deals, Navigate to Deals

Hover over the CRM section in the navigation to the left and Click on Deals



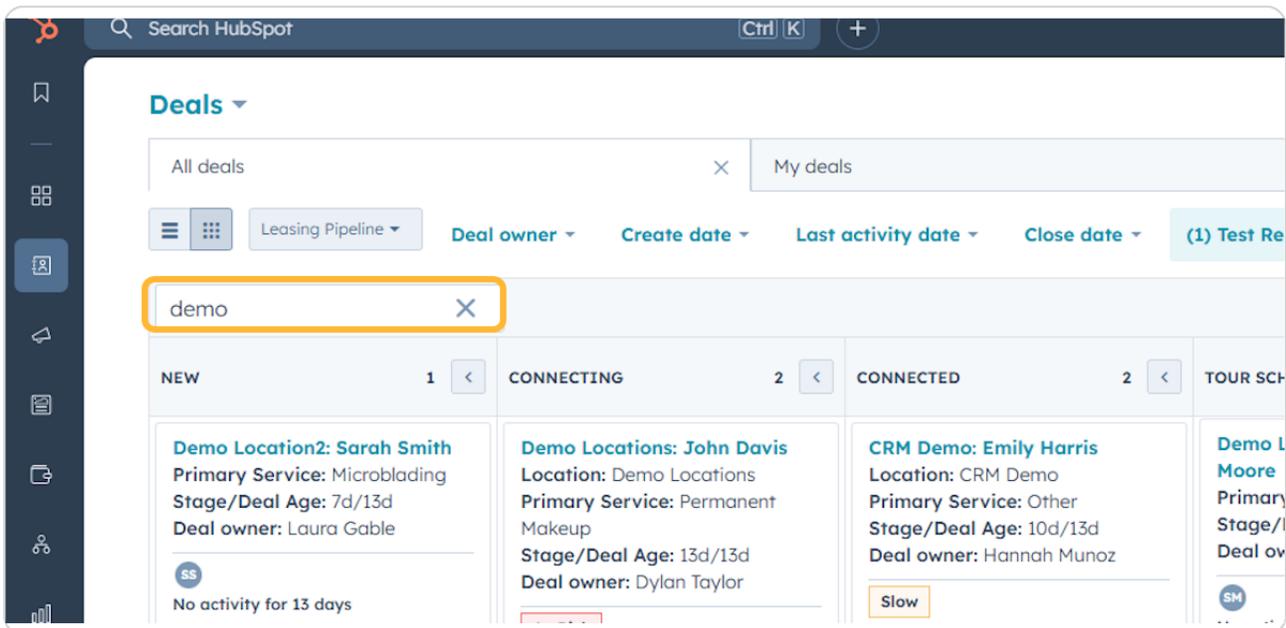
STEP 2

You'll be taken to the Deals index page



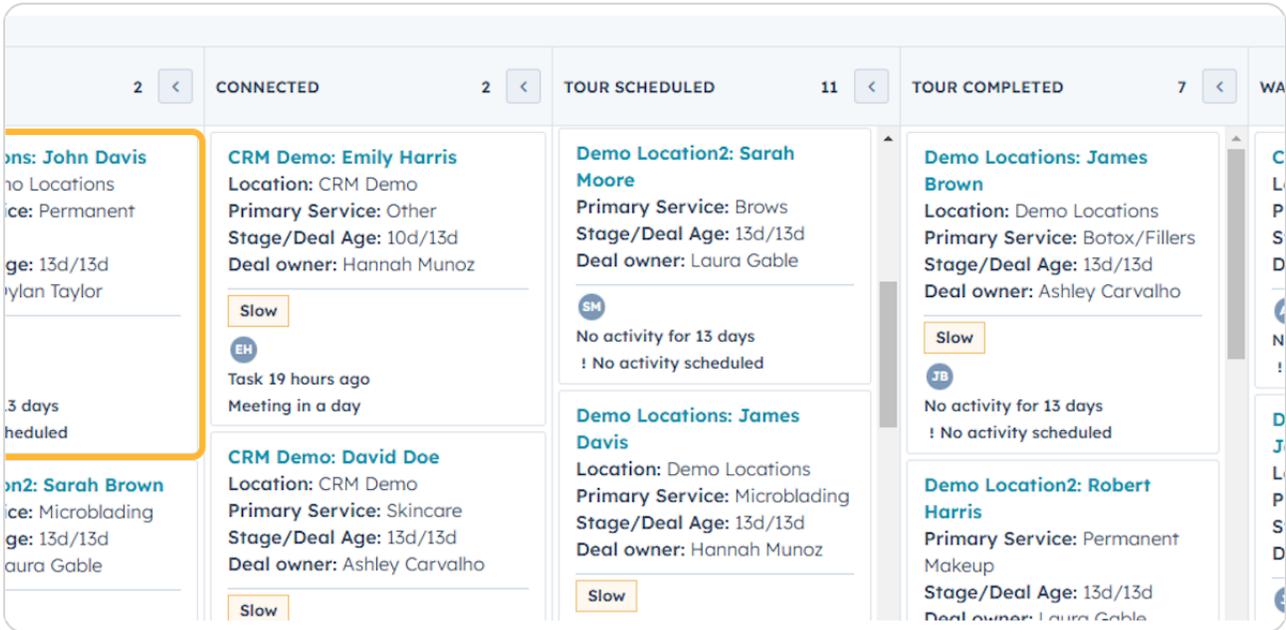
STEP 3

If you don't want to hunt for the Deal you're looking for, you can search for it



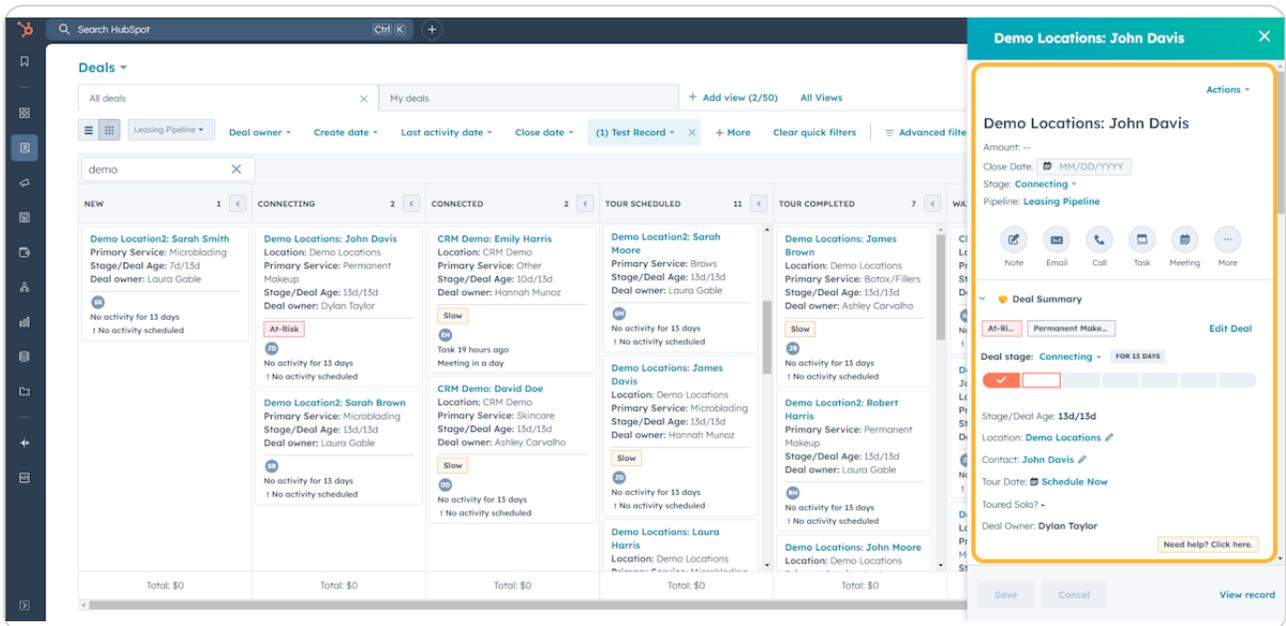
STEP 4

Click on the card of the Deal you want to preview



STEP 5

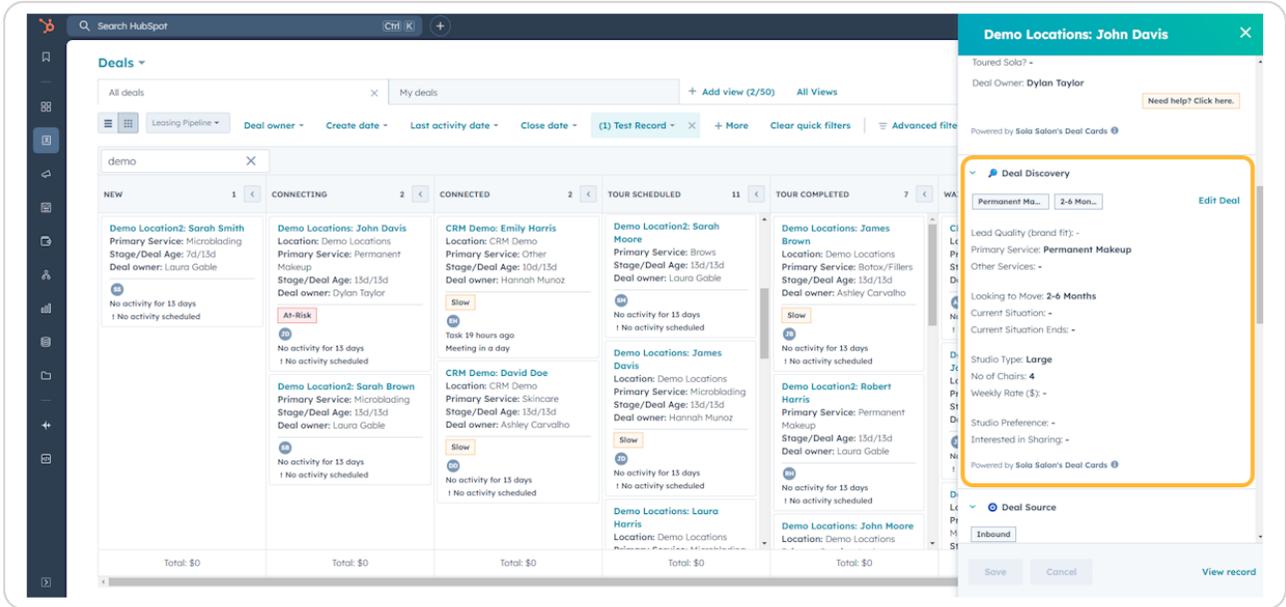
A preview will populate on the right-hand side



STEP 6

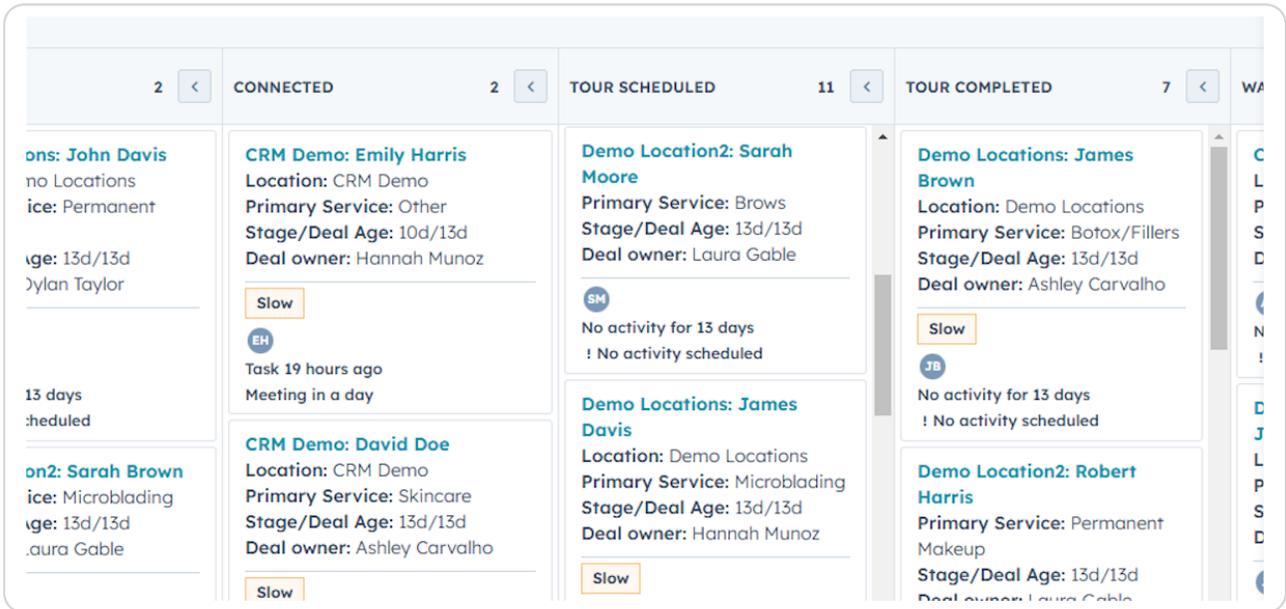
Scroll until you get to the section Deal Discovery

This is the key information you'll want to capture during the Discovery process. This information appears on the card to allow for easy-to-access notes to guide sales conversations.



STEP 7

To update any Deal Discovery information, Click Edit Deal



STEP 8

This pane will open up for you to edit any Deal information

Edit Deal

Deal Summary

Tour Date/Time
11/30/2024 8:21 AM HST

Has the lead toured Solo?
--

Deal owner
Dylan Taylor

Deal Discovery

Lead Quality (Brand fit)
--

Primary Service
Permanent Makeup

Other Services
--

Looking to Move
2-6 Months

Current Situation
--

Current Situation Ends

Examples of Editing Deal Discovery Information

8 Steps

STEP 9

Click on Lead Quality (brand fit)



STEP 10

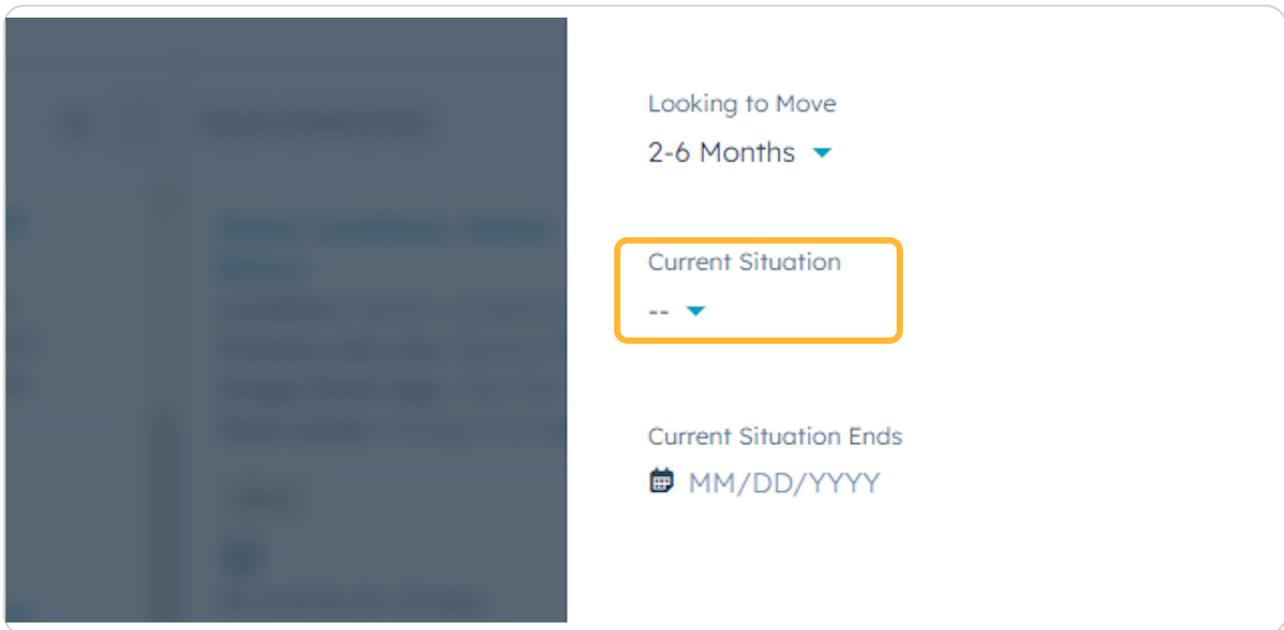
Select either High, Medium or Low

Note: As you update information it will automatically save to the Deal.



STEP 11

Click on Current Situation



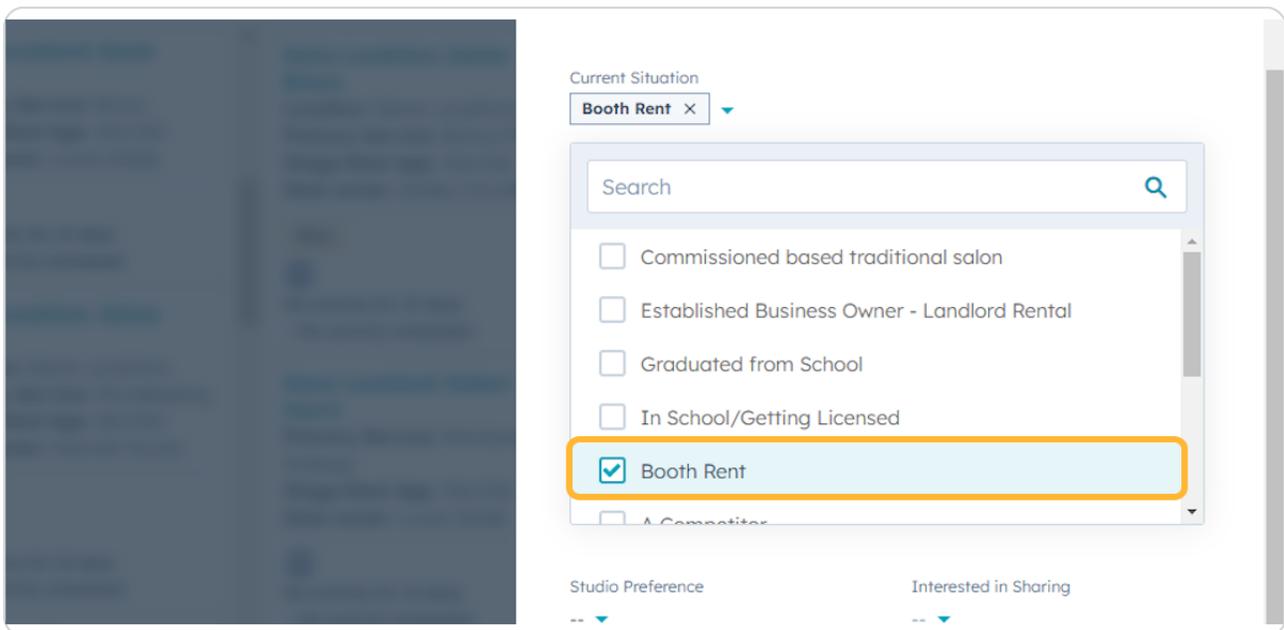
Looking to Move
2-6 Months ▾

Current Situation
-- ▾

Current Situation Ends
📅 MM/DD/YYYY

STEP 12

Select the Type of Studio the Pro would like



Current Situation
Booth Rent × ▾

Search 🔍

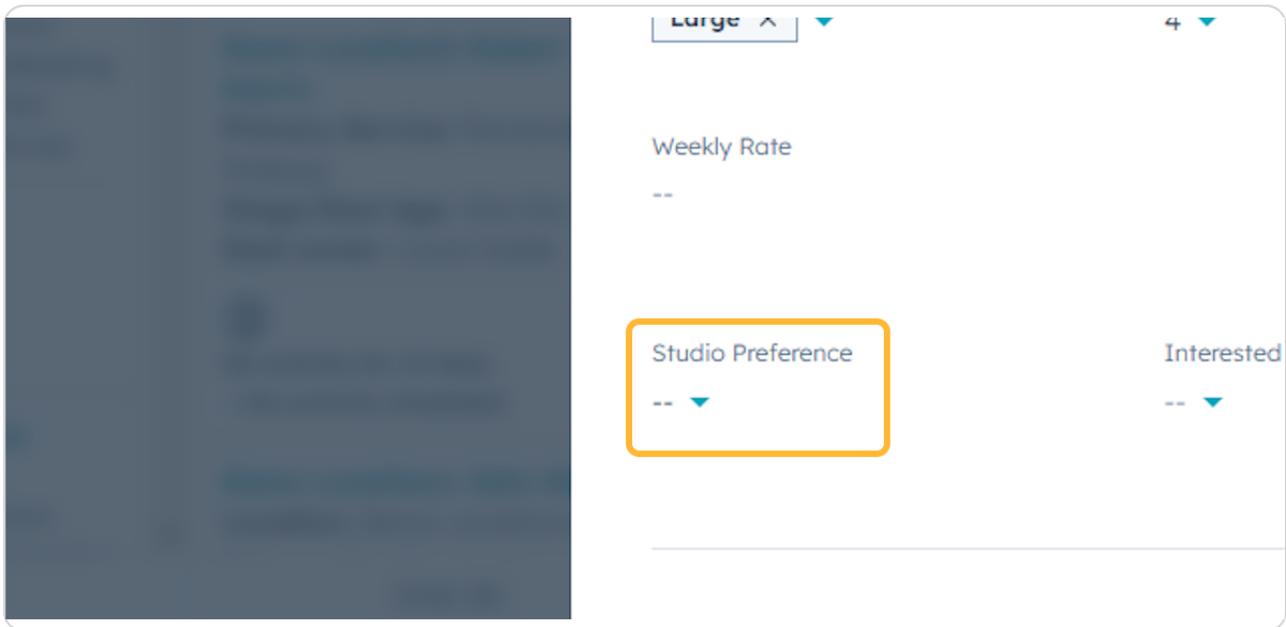
- Commissioned based traditional salon
- Established Business Owner - Landlord Rental
- Graduated from School
- In School/Getting Licensed
- Booth Rent
- A Competitor

Studio Preference -- ▾

Interested in Sharing -- ▾

STEP 13

Click on Studio Preference



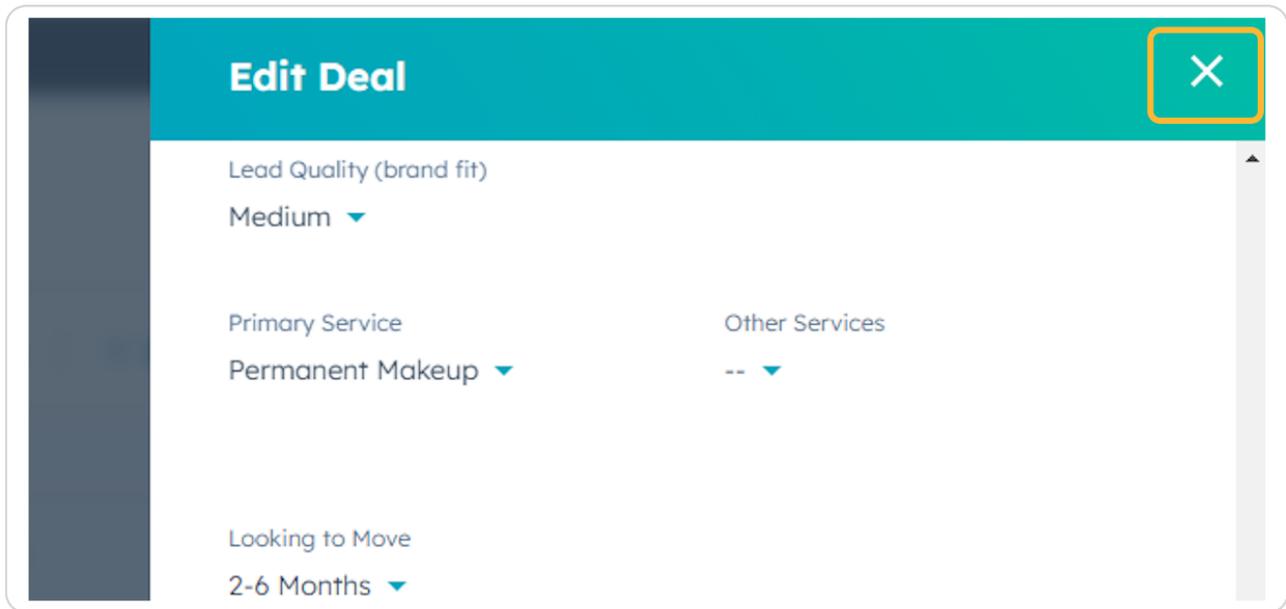
STEP 14

Update the Pro's Preference to the Studio



STEP 15

Click on Close when you are done making changes



STEP 16

The Deal Discovery section will automatically update for you to access in later sales conversations

