# 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 <u>View most recent version</u>

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## 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





You'll be taken to the Deals index page

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## STEP 3

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

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## Click on the card of the Deal you want to preview

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#### **STEP 5**

## A preview will populate on the right-hand side





## 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

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



# # Examples of Editing Deal Discovery Information 8 Steps



## 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.





## **Click on Current Situation**



#### STEP 12

# Select the Type of Studio the Pro would like

-		Current Situation	
		Booth Rent ×	
	10000	Search	۹
	2	Commissioned based tr	raditional salon
	<b>Contract</b>	Established Business Ov	wner - Landlord Rental
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	And in case of case of	A Compositor	-
	2	Studio Preference	Interested in Sharing
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## **Click on Studio Preference**



#### STEP 14

# Update the Pro's Preference to the Studio





# Click on Close when you are done making changes

Edit Deal		×
Lead Quality (brand fit)		
Medium 🔻		
Primary Service	Other Services	
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Looking to Move		
2-6 Months 🔻		

### STEP 16

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

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