

BOUNDARY MINING GROUP OUTSIDE SALES SOP

FOLLOW UPS SOP

INTRODUCTION

Tools Used: HubSpot CRM, Visual, Shared Drive (W: Quotes)

Purpose

The purpose of this SOP is to establish a consistent process for managing customer quote activity, follow ups, and opportunity tracking within HubSpot.

Scope

This SOP applies to all Boundary Mining Group employees involved in customer quoting, opportunity management, and sales follow up activities within HubSpot, including but not limited to Outside Sales.



DATE
05/20/2026

APPLIES TO
Sales Team

Detailed Procedure – Follow-ups

1. SENDING QUOTES

- Download Visual PDF
- Send through Outlook
- Associate email to HubSpot

2. UPDATING QUOTE STATUS

- Issued
- Revision requested
- Won
- Lost
- Deferred

3. FOLLOW UP EXPECTATIONS

Initial follow up within 3 business days

Secondary follow up after 1 week

Monthly follow up for deferred opportunities

4. CREATING FOLLOW UP TASKS

CRM → Tasks → Create Task

5. BEST PRACTICES

Always include value in follow ups

Avoid generic “checking in”

Reference customer needs