

BOUNDARY MINING GROUP OUTSIDE SALES SOP

SALES CALL REPORT

INTRODUCTION

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

Purpose

To standardize how Sales Call Reports are logged directly into HubSpot, replacing Word-based documents. This digital method ensures real-time visibility, centralized documentation, and consistent data collection for in-person customer visits.

Scope

This SOP applies to all sales personnel conducting in-person visits with customers, prospects, or suppliers. These interactions qualify as Sales Calls and must be recorded in HubSpot accordingly.



DATE
05/20/2026

APPLIES TO
Sales Team

Detailed Procedure – Sales Call Report Log

1. ACCESS THE COMPANY RECORD

Actions:

- Log in to your HubSpot account.
- Navigate to “**Companies**” in the left-hand side menu.
- Use the search bar to find the company visited.
- Click on the company name to open the record.

2. CREATE A SALES CALL REPORT

Actions:

- On the right-hand panel, locate “Sales Call Report.”
- Click “+Add”
- Complete all required fields in the form:

Field	Description
Call Report	Add the name of your call report
Meeting Status	Scheduled or completed
Travel Checklist	Trip Arranged, PPE, Safety Training
Products to be Discussed	Add the products you intend to present and discuss
Date of the Meeting	Select date
Division	Select the division you represent
Industry	Select customer’s industry
Location	Enter physical location of the meeting
Personnel & Titles	List names and titles of customer attendees
Visit Type	Choose: General Meeting, Needs Assessment, Market Analysis, or Solution
Goals of Visit	Describe meeting objectives
Meeting Notes	Capture the main discussion topics, customer interests, feedback, opportunities, concerns, and notable comments from the meeting.
Customer Feedback	Explain any customer feedback
Action Items & Due Dates	Detail next steps, owners, and due dates

3. ASSOCIATE YOUR CALL REPORT

Actions:

- Make sure associated company is correct.
- Associate a contact to the Call Report.

4. CREATE THE REPORT

Action:

- Once all required fields are filled out, click **“Create Sales Call Report.”**

5. REVIEW AND EDIT THE REPORT

Actions:

- Your call report will open.
- You may:
 - Add links, images, screenshots
 - Attach relevant files
 - Refine your descriptions

5. CREATE A PDF OF THE REPORT

Actions:

- Once you are happy with the information on your call report.
- Click on Create PDF – Call Report
 - Select Yes
- After a few minutes, refresh the page and a link to your pdf will be created.

6. NOTIFY THE TEAM

Actions:

- Download your PDF and notify the appropriate stakeholders via email:
@Alex Tutschek @Brad Tutschek @Monte Tutschek @Roslyn @Tristan
@Engineering

Responsibilities

Role

Sales Rep

Engineering/Sales Leads

Responsibility

Complete and submit the Sales Call Report

Review tagged action items and respond accordingly

Tips for Success

- Be clear and specific about visit goals and outcomes.
- Always include follow-up action items with due dates.
- Use To-do tasks to manage your own next steps.
- Attach supporting media or files.
- Keep comments professional, relevant, and actionable.

FAQs

Q: What if I forgot to add an attachment?

A: Go to “Activities,” edit the report using the pencil icon, and upload your file.

Q: Can I log a report for a virtual meeting?

A: Yes. Follow the same steps used for in-person meetings.

Q: What if the Division is missing from the dropdown?

A: Contact the Sales Ops team to update the division list.