



ERP SET UP CHECKLIST

Offering

Free set up
No signed agreement
Free access to cloud based plan 24/7 for entire staff
2 free hrs of 3D scans uploaded to plan and hosted
Property walkthrough and simple data collection, including vendor info. Priority buildings, nothing under 15k sq. ft.
100k+ sq. ft facility has ability to stage equipment w/ quarterly billing on rental
Loss scenario walkthrough after 12 months on the plan

Target Market

Priority	Commercial prop mgrs, assisted living, hotels, existing clients
Secondary	Healthcare, private schools, multi family
Alt/Other	

Sales Process

See commercial sales playbook

KPI Per Month

Avg Sq. Ft.
of ERP Presentations
Signed ERPs

50,000
3
1.5

KPI Review

Review contacts made on a weekly schedule, track on pace for monthly ERP KPI targets

Marketing Material

Flyer
Website Updated
Social Post
ERP logo
Cards
Tradeshaw display

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