



How To Submit Your First Lead

Welcome to the team! To register every customer lead we will need to know the business name, a primary contact name, and email address for the CRM and quote preparation.

Under no circumstances will anyone from Loop contact your customer without prior authorization from you.

PROPOSAL

1



Loop +
Partner



Option #1

MAKE AN INTRO

We are built to work directly with end-users. This means you can feel comfortable making an email or phone introduction, then we will pick up the process from there. We ensure you're kept informed of the progress and will reach out to you directly with any questions that may be a more technical aspect. The goal is for your customer to feel confident in the process and for you to not be in a position of failure! Include [James McKinney](#), [Brian Tolleson](#), or partners@loopcommunications.com in your introduction email.

Option #2

SEND LOOP INFO

If you would rather present the quote to your customer, we're prepared to make that happen as well. Send over as many specifics as possible, such as the number of extensions, phone numbers, desired phone models (if needing hardware), and any unique requirements, such as integration with an existing intercom or door security. Don't feel like you need to be ready with everything, we'll ask if something's missing. With this info, we'll put together the quote and you can present it.

ONBOARD

2



Loop

INSTALL

3



Partner

SUPPORT

4



Loop

TO SUBMIT CUSTOMER INFORMATION PLEASE VISIT:

www.loopcommunications.com/current-partner-resources/#lead

800-586-0320 | www.loopcommunications.com