CO-PILOT PROGRAM

Thank you for your interest in the co-pilot program. The intent is to have a team of people to help collect accurate data for your organization's pipeline in a timely manner using various methods.

DATA COLLECTION

There are three ways to send information to our team for entry into the CRM prior to weekly verification through pipeline checkdowns.

- **PHONE/TEXT**
  Relay information through live conversation or detailed messages
- **EMAIL**
  Using the template provided, fill in any applicable fields for our team to enter and verify during your weekly scheduled call
- **PIPELINE CHECKDOWN**
  A scheduled weekly meeting that you can also use to input data live through your operations support person

PIPELINE CHECKDOWN

A scheduled weekly meeting to run through open opportunities and collect additional data for CRM entry.

- **DEAL/OPPORTUNITY**
  We ensure any opportunities are present in the CRM as deals
- **NEXT STEP**
  We establish and verify clearly defined next steps for current opportunities
- **NEXT STEP DATE**
  We set next step dates as future reminders to complete the previously defined next steps

RESOURCES

- **SCORECARD**
  A scorecard will be provided to all members and will include individual tabs for measuring attendance, timeliness, and thoroughness, ensuring both sides are kept accountable.
- **OPERATIONS TEAM**
  Your operations team is made up of several BDPros. They are available for data transfer outside of regular scheduled time and are happy to help! To streamline the process, please CC the custom email created for your copilot program on any emails for data transfer.

If you have any questions at any time, please do not hesitate to reach out. We look forward to supporting your efforts and creating a functional and useful database with clean and thorough information.

BDPROS