SALES EXECUTIVE PLAYBOOK

Sales Executive

JD | SOPs | Policies | Registers | Formats

Use: This document is the operating manual for the Sales Executive (SAL-EXE). Follow the Swara Authority & Escalation Matrix strictly. If an approval is not in writing (ERP/email/WhatsApp screenshot attached), it is treated as **NOT** approved.

Playbook Outputs (Must)	Evidence / File Location (suggested)
Sales Executive Job Description (JD) + KPI Scorecard	00__Admin & Governance / HR / JDs
Sales Executive SOPs (SOP-01 to SOP-20) - one-by-one	10__Sales & CRM / SOPs / Sales Executive
Sales Executive Policies (POL-01 to POL-12) - one-by-one	00__Admin & Governance / Policies / Sales
Sales Executive Registers (REG-01 to REG-18) - printable templates	10__Sales & CRM / Registers
Sales Executive Formats/Templates (FMT-01 to FMT-20) - printable templates	10__Sales & CRM / Formats
Escalation Ladder + Mandatory Message Format (Sales)	00__Admin & Governance / Escalations

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How to use: Print registers & formats for sales file. Keep scans in the project folder. If a record is missing, treat it as a risk and escalate. This playbook is designed to be auditable - keep evidence.

1. Role Overview & Job Description (Sales Executive)

1.1 Role summary

Convert qualified leads into bookings and collections through a compliant, documented process. The Sales Executive is responsible for lead response, qualification, site visits, follow-ups, booking coordination, documentation support and collection follow-up - without making any unauthorized commitments.

1.2 Reporting & interfaces

- **Reports to:** Sales Manager (SAL-M)
- **Dotted line:** CRM (documentation, receipts allocation), Accounts (payment confirmation)
- **Works closely with:** Site team (PM-S/SSE/SE) for visits, Legal for customer documents, Marketing for campaigns
- **Authority boundary:** Sales Executive cannot approve discounts/price deviations/refunds - must follow approval matrix.

1.3 Core responsibilities

- Capture every inquiry in CRM/ERP with correct source code and project mapping (no missing leads).
- First call within defined SLA; qualify customer requirement (budget, configuration, location, timeline).
- Schedule and conduct site visits; provide accurate product information (carpet area, amenities, timeline) as per approved material.
- Maintain disciplined follow-up cadence; update next action/date in CRM daily.
- Share only approved rate card; raise discount/scheme requests through SAL-M with evidence (no verbal commitments).
- Coordinate booking process: unit selection, booking form, token receipt process (bank-only), and document collection.
- Support collections: remind payment milestones, track ageing, coordinate with CRM/Accounts for receipt allocation.
- Handle customer concerns professionally; escalate unresolved complaints >48 hrs or legal notice risk.
- Maintain audit trail: call logs, visit logs, approvals, customer communications.
- Collect competitor/market feedback and share weekly insights to SAL-M.

1.4 Daily / Weekly / Monthly routine

Daily

- Update CRM first thing: pending follow-ups, today’s visits, priority hot leads.
- Call/WhatsApp follow-ups as per pipeline; log outcome in REG-02 and CRM.
- Confirm site visits with customer + site team; carry approved brochure/rate card only.
- After each site visit: complete FMT-04 feedback + update REG-03 and CRM stage.
- End of day: send DCR summary to SAL-M (REG-18) and highlight approvals needed (discount/hold/booking).

Weekly

- Attend weekly pipeline review with SAL-M; update REG-05 stage tracker and action plan.

- Share competitor rate check + customer objections trends; update REG-07 rate card notes (if any changes).
- Review collections ageing with CRM/Accounts; plan follow-up for due/overdue customers (REG-11).
- Review cancellations risk list; ensure proactive communication with at-risk customers (REG-14).

Monthly

- Target vs achievement review; analyze conversion ratios and drop-offs; submit improvement plan.
- Incentive/variable reconciliation with SAL-M/Accounts based on collections and cancellations (Appendix B).
- Audit readiness: ensure all bookings have complete KYC + approvals + communication logs.

1.5 KPI Scorecard (Example)

KPI Area	Measure (examples)	Weight
Lead response time	SLA compliance; first contact time; missed leads = 0	15%
Qualification quality	Correct requirement capture; qualified-to-visit conversion	10%
Site visit conversion	Visit-to-booking conversion; visit quality feedback	20%
Booking & documentation	Booking pack completeness; zero missing forms/approvals	15%
Collections support	Due reminders sent; overdue ageing reduced; receipt discipline	20%
CRM hygiene	Daily updates; next action set; accurate stage mapping	10%
Compliance & ethics	No verbal discounts, no cash, no false promises, zero complaints due to mis-commitment	10%

Scoring rule: KPI score must be supported with evidence (register entries, CRM logs, approval screenshots, customer confirmations).

1.6 Non-negotiables (Do Not Skip)

- No cash, no personal UPI, no personal bank account receipts - all receipts only in company/bank channels.
- No verbal discount/scheme/possession date/amenity promises. If it is not written and approved, it is not committed.
- Use only approved marketing material and RERA-compliant statements (carpet area, approvals status).
- Every lead must be in CRM/ERP. If it is not in CRM, it is treated as not done.
- Escalate complaint unresolved >48 hrs or legal notice risk immediately.

1.7 Skills & competencies

- Strong communication (Gujarati/Hindi/English as required) with ethical selling mindset.
- Basic understanding of real estate terminology: carpet area, agreement value, milestones, RERA basics.
- CRM discipline: data entry, follow-up scheduling, pipeline stage management.
- Negotiation within boundaries: ability to explain value without unauthorized discounts.
- Documentation discipline and attention to detail.

1.8 Tools & access (minimum)

- CRM/ERP login (role-based), lead source dashboards.
- Approved rate card + brochure + specification sheet + availability sheet.
- WhatsApp Business / email with approved templates; call recording as per policy (if enabled).
- Site visit PPE / visitor pass process (as per POL-11).

1.9 JD acceptance (acknowledgement)

I have read and understood this JD/SOP/Policy playbook and will follow Swara’s authority and escalation rules.

Employee Name	Designation	Signature	Date

2. Phase Map (Phase 0-11) - Sales responsibilities & evidence

Phase	Focus	Sales Executive responsibilities (what to do)	Evidence / Registers
Phase 0	Governance setup	Understand authority matrix, discount rules, receipt rules; get CRM access; use only approved templates and rate card versions.	POL-02, POL-05 | REG-07 Rate card version | REG-18 DCR
Phase 1	Pre-launch due diligence (support)	Collect market intelligence (micro-market pricing, competitor offers, buyer objections). Share weekly note to SAL-M for feasibility.	REG-07 Competitor note | REG-18 Weekly review notes
Phase 2	Feasibility & offer structuring	Support rate card draft with market data; validate buyer preferences for unit mix/amenities; flag pricing risks.	REG-07 Rate card notes | FMT-05 Offer template
Phase 3	Stakeholder / internal readiness	Align commitments with delivery capacity; ensure sales scripts do not conflict with construction/approval reality; prepare CRM pipeline structure.	POL-03 RERA/ads | REG-05 Pipeline tracker
Phase 4	Agreements & legal readiness	Ensure customer-facing commitments match agreement clauses and annexures; raise gaps to SAL-M/Legal before marketing/booking.	POL-02 No verbal commitments | REG-12 Comm log
Phase 5	Product finalisation	Use final specifications/amenities list; update objection handling scripts; coordinate with marketing for approved creatives.	FMT-02 Script sheet | POL-03 Ad compliance
Phase 6	Approvals & RERA readiness	Sell only within approvals/RERA rules; ensure every ad/WhatsApp creative includes RERA details (if applicable) and correct carpet area.	POL-03 | REG-07 version control | REG-12 comm log
Phase 7	Customer management & transit updates (if redevelopment)	Send structured project updates; manage queries; coordinate with CRM for rent/commitments (no new promises).	REG-12 comm log | REG-13 complaints
Phase 8	Site access & safety for visits	Schedule customer visits with site permission; follow visitor safety policy; never enter restricted zones without escort/PPE.	POL-11 | REG-03 visit log | FMT-18 safety briefing
Phase 9	Construction progress updates	Use approved progress snapshots from PM-S/Planning; avoid over-promising dates; update pipeline and follow-ups.	REG-12 comm log | REG-18 DCR
Phase 10	Sales, completion, handover support	Support collections closure; coordinate possession documentation with CRM; manage snags communication professionally.	REG-11 collections | REG-10 KYC | REG-13 complaints
Phase 11	DLP / post-handover	Route customer complaints to DLP team/CRM; capture testimonials and referrals once issues resolved.	REG-16 referrals | REG-13 complaint closure

3. SOPs (In-depth, One-by-One) - SOP-01 to SOP-20

SOPs are the step-by-step operating procedures. Follow exactly and keep evidence in registers/templates.

SAL SOP-01: Lead Capture & Source Coding (CRM Entry)

Objective: Ensure every inquiry is captured with correct source and project mapping so no lead is lost and conversion can be measured.

Trigger / Frequency: Every new inquiry (call, WhatsApp, walk-in, channel partner, website, campaign).

Inputs:

- Inquiry details (name, phone, requirement, budget range, location preference)
- Lead source (portal/campaign/referral/broker/walk-in) and campaign code
- Project list + inventory status (latest availability sheet)

Step-by-step:

[ ] Create lead in CRM immediately (same day) using FMT-01 Inquiry Form data.

[ ] Assign correct source code and campaign name; attach screenshot if lead came from WhatsApp/social.

[ ] Tag project, configuration and budget; set lead stage = New.

[ ] Schedule next action (first call) within SLA and set follow-up date/time.

[ ] If duplicate lead exists: merge/update notes; do not create multiple profiles.

Outputs / Evidence:

- Lead created with source code + timestamp
- Next action scheduled (call/visit) with owner assigned
- Audit trail available in REG-01

Registers / Formats used: REG-01 | FMT-01

Escalations:

- Lead source unclear or conflict (broker claiming) -> inform SAL-M same day and record in REG-15.

Notes / Do not skip:

- No CRM entry = lead treated as not received.
- Always capture alternate number and email if available.

SAL SOP-02: First Contact / Response SLA (First Call within SLA)

Objective: Respond fast and professionally to increase conversion and reduce lead leakage.

Trigger / Frequency: Within defined SLA after lead creation (target: within 15-30 minutes; max same day).

Inputs:

- Lead details from CRM/REG-01
- Approved script (FMT-02) and project key highlights
- Availability sheet + approved rate card

Step-by-step:

[ ] Call the customer; introduce yourself and confirm inquiry details.
[ ] Ask 4 qualification questions: budget, configuration, location, timeline.
[ ] Confirm preferred channel (call/WhatsApp/email) and best time for follow-up.
[ ] Offer site visit slot options; send confirmation message (FMT-03) if agreed.
[ ] Log call outcome and next action in REG-02 and CRM immediately.

Outputs / Evidence:

- Call attempt logged with outcome
- Qualification captured and stage updated (New -> Contacted/Qualified)
- Visit scheduled or follow-up date fixed

Registers / Formats used: REG-02 | FMT-02, FMT-03

Escalations:

- If lead demands discount/commitment on first call -> explain approval process; raise request to SAL-M only after qualification.

Notes / Do not skip:

- Do not share unapproved rates or possession commitments.
- If unreachable: attempt 3 times same day (different time slots) then schedule follow-up.

SAL SOP-03: Lead Qualification & Requirement Sheet

Objective: Convert raw inquiries into qualified opportunities using structured requirement capture.

Trigger / Frequency: After first contact and before site visit/quotation.

Inputs:

- Customer conversation notes
- Approved configuration list + carpet areas
- Payment plan options (approved)

Step-by-step:

[ ] Fill requirement sheet (FMT-04) with must-have and good-to-have items.
[ ] Confirm budget range and funding source (self/loan) and expected loan eligibility.
[ ] Identify decision makers (family) and timeline for booking.
[ ] Classify lead score (Hot/Warm/Cold) and record in REG-04.
[ ] Update CRM stage and set next action (visit/quotation/follow-up).

Outputs / Evidence:

- Requirement sheet completed
- Lead score assigned with reason
- Next action scheduled and visible to SAL-M

Registers / Formats used: REG-04 | FMT-04

Escalations:

- If customer is investor/large ticket or corporate deal -> inform SAL-M for special handling.

Notes / Do not skip:

- Qualification is mandatory before sending offers; avoid wasting site time.

SAL SOP-04: Site Visit Scheduling & Internal Coordination

Objective: Plan site visits without disrupting site operations and ensure customer experience is consistent.

Trigger / Frequency: When customer agrees for a visit or requests a walkthrough.

Inputs:

- Customer preferred date/time
- Site visiting hours and contact person
- Safety/visitor policy and visitor PPE availability

Step-by-step:

[ ] Check site visiting schedule; avoid peak construction hazard windows.
[ ] Confirm availability with site team/contact; book slot in REG-03.
[ ] Send customer confirmation message with location, parking, documents to carry (FMT-03).
[ ] Prepare visit kit: brochure, rate card, ID badge, PPE instructions.
[ ] On visit day: inform site team arrival; ensure visitor register/safety briefing done.

Outputs / Evidence:

- Site visit scheduled with internal confirmation
- Customer receives confirmation message
- Visitor record maintained

Registers / Formats used: REG-03 | FMT-03, FMT-18

Escalations:

- If site team denies visit due to safety/operations -> reschedule and inform customer professionally (no arguments).

Notes / Do not skip:

- Never take customer inside restricted zones without escort.
- Avoid promising that construction can be stopped/changed for visit.

SAL SOP-05: Site Visit Execution & Walkthrough (Compliance)

Objective: Conduct a compliant site visit that builds trust and avoids mis-commitments.

Trigger / Frequency: During every customer site visit/walk-in at site office.

Inputs:

- Customer requirement sheet
- Approved sales script and product factsheet
- Latest stage-wise progress info approved by PM-S/Planning

Step-by-step:

[ ] Register visitor and provide safety briefing (FMT-18) and PPE if required.

[ ] Understand customer requirement again quickly; align which units to show.

[ ] Show sample flat / mock-up / floor plan; explain carpet area and inclusions clearly.

[ ] Explain payment milestones and approval status honestly; avoid exact handover date unless approved.

[ ] Record customer objections and preferences; capture visit feedback (FMT-04).

[ ] Before leaving: confirm next step (booking discussion / second family visit / quotation) and date.

Outputs / Evidence:

- Visit completed with safety compliance
- Feedback captured and CRM stage updated
- Next action agreed with customer

Registers / Formats used: REG-03 | FMT-04, FMT-18

Escalations:

- If customer demands technical changes -> log request and route to SAL-M; do not commit.

Notes / Do not skip:

- Any promise made on site must be written and approved.
- Always keep visit short and structured; do not criticize competitors.

SAL SOP-06: Follow-up Cadence & Next-Action Discipline

Objective: Maintain momentum and maximize conversion by disciplined follow-ups.

Trigger / Frequency: After first call, after site visit, after quotation, until closure (booking/cold).

Inputs:

- Lead stage and last interaction date
- Customer objections and next steps
- Approved offer/quotation

Step-by-step:

[ ] Set follow-up plan based on lead temperature: Hot (daily), Warm (every 2-3 days), Cold (weekly).
[ ] Use REG-02 Call Log to record every attempt and outcome.
[ ] Send value-based messages (not spam): progress, benefit, limited inventory (only if true).
[ ] If lead goes silent: attempt 3 calls + 1 WhatsApp + 1 email; then mark as 'Nurture' with next date.
[ ] Update REG-05 pipeline tracker weekly for SAL-M review.

Outputs / Evidence:

- Follow-up log complete with outcomes
- Pipeline stage and next action always current
- Escalations triggered for high-risk/important deals

Registers / Formats used: REG-02, REG-05 | FMT-11, FMT-19

Escalations:

- If hot lead is stuck due to pricing/discount -> raise discount request process (SOP-08) via SAL-M.
- If customer threatens to cancel or complain -> open complaint ticket (REG-13) and inform SAL-M same day.

Notes / Do not skip:

- CRM hygiene is mandatory; no private notes only.
- Never promise limited inventory if you cannot prove it.

SAL SOP-07: Quotation / Offer Sharing (Rate Card Controlled)

Objective: Share clear and consistent offers using only approved rate cards and terms.

Trigger / Frequency: When customer asks for price or after qualification/site visit.

Inputs:

- Approved rate card (latest version) and availability sheet
- Floor rise, parking, PLC rules (approved)
- Offer template (FMT-05) and payment plan

Step-by-step:

[ ] Confirm rate card version in REG-07 and attach version date in quotation.

[ ] Prepare quotation using FMT-05 with unit details: carpet, floor, view, parking, taxes, timeline assumptions.

[ ] Mention that discounts/schemes require written approval; do not include unapproved discounts.

[ ] Send quotation via email/WhatsApp (as preferred) and log communication in REG-12.

[ ] Schedule follow-up within 24-48 hrs to explain and address doubts.

Outputs / Evidence:

- Quotation shared with version control
- Communication logged
- Follow-up scheduled

Registers / Formats used: REG-07, REG-12 | FMT-05

Escalations:

- If customer asks for exception (special rate, payment plan deviation) -> raise request via SOP-08 to SAL-M.

Notes / Do not skip:

- Never edit rate card numbers manually without referencing the approved version.

SAL SOP-08: Discount / Scheme Request & Approval Workflow

Objective: Ensure all discounts/schemes follow company approval matrix and have audit trail.

Trigger / Frequency: When customer requests discount, payment plan deviation, waiver, or special scheme.

Inputs:

- Customer requirement + justification (budget, competitor offer evidence if available)
- Approved rate card and floor rise rules
- Discount request format (FMT-06)

Step-by-step:

[ ] Prepare discount request note (FMT-06) with customer name, unit, request amount, justification, evidence.

[ ] Enter request in REG-08 with date/time and requested decision deadline.

[ ] Submit to SAL-M for review; do not communicate discount to customer until written approval received.

[ ] If approved: attach approval screenshot/email in CRM and REG-08; update quotation.

[ ] If rejected: communicate politely; offer alternatives (unit change, payment plan within standard).

Outputs / Evidence:

- Discount request recorded and approved/rejected with evidence
- Customer communication aligned to approved decision
- No verbal commitments risk

Registers / Formats used: REG-08 | FMT-06

Escalations:

- If decision delay may lose hot customer -> remind SAL-M and escalate to SAL-H/PM-HO as per matrix (with evidence).

Notes / Do not skip:

- Only SAL-M/SAL-H/OWN approvals are valid; Sales Executive cannot approve.

SAL SOP-09: Unit Blocking / Hold Request (Inventory Integrity)

Objective: Prevent double-selling and maintain transparent inventory holds.

Trigger / Frequency: When customer requests to block a unit pending booking/token.

Inputs:

- Unit details + availability status
- Hold policy (time limits, conditions)
- Hold request form (FMT-07)

Step-by-step:

[ ] Confirm unit availability with SAL-M/CRM and inventory system (no assumptions).
[ ] Fill hold request (FMT-07) with customer details and hold duration; record in REG-06.
[ ] Get SAL-M approval for hold; update system/CRM stage accordingly.
[ ] Communicate hold conditions to customer (expiry time, token requirement).
[ ] If hold expires: release unit and inform customer politely; update REG-06.

Outputs / Evidence:

- Approved hold recorded with expiry
- Inventory updated (no conflict)
- Customer understands conditions

Registers / Formats used: REG-06 | FMT-07

Escalations:

- Any conflict between two customers on same unit -> immediate escalation to SAL-M; freeze communication until resolved.

Notes / Do not skip:

- No unofficial holds via WhatsApp only; must be in register/CRM.

SAL SOP-10: Booking (Token) Process - Compliance & Receipt Discipline

Objective: Convert decision into booking with complete documentation and compliant receipt process.

Trigger / Frequency: Customer confirms booking/token payment intent.

Inputs:

- Approved unit selection and final quotation
- Booking checklist (FMT-08) and acknowledgement template (FMT-09)
- Bank account details for company (no cash)

Step-by-step:

[ ] Confirm unit, final approved price and payment schedule; ensure discount approvals attached if any.

[ ] Collect customer KYC documents as per FMT-10; start REG-10 checklist.

[ ] Guide customer to pay token only via bank transfer/cheque as per company policy; no cash/UPI to personal numbers.

[ ] After payment: coordinate with Accounts/CRM to confirm receipt and allocate in ERP; log in REG-09.

[ ] Send booking acknowledgement (FMT-09) and next steps (agreement timeline, milestone payments).

Outputs / Evidence:

- Booking recorded with receipt confirmation
- KYC collection initiated/complete
- Customer receives official acknowledgement

Registers / Formats used: REG-09, REG-10 | FMT-08, FMT-09, FMT-10

Escalations:

- If customer insists on cash -> politely refuse and escalate to SAL-M; do not accept cash under any circumstance.

Notes / Do not skip:

- Never issue manual receipts; only official receipt from Accounts/CRM.
- Booking without KYC and approvals is a future dispute.

SAL SOP-11: KYC & Document Collection (Booking Pack Completion)

Objective: Ensure every booking has complete documentation for agreement, loan, and compliance.

Trigger / Frequency: After token/booking and before agreement execution.

Inputs:

- Customer KYC checklist (FMT-10)
- Loan requirements (if applicable)
- Agreement data fields needed by legal/CRM

Step-by-step:

[ ] Collect PAN, Aadhaar, address proof, photos; verify name match across documents.
[ ] If joint buyers: collect documents for all; record relationship and share details.
[ ] Capture booking details: correspondence address, email, nominee details, funding plan.
[ ] Update REG-10 and attach scanned copies in CRM folder.
[ ] If documents missing: send reminder message (FMT-10) and follow-up; escalate if delay risks agreement timeline.

Outputs / Evidence:

- Complete KYC pack ready for agreement
- Document scans stored with proper naming
- Reduced cancellation/refund disputes

Registers / Formats used: REG-10 | FMT-10

Escalations:

- If customer refuses PAN/Aadhaar or provides mismatch -> escalate to CRM/Legal for guidance before proceeding.

Notes / Do not skip:

- No agreement draft should start without verified details.

SAL SOP-12: Collections Follow-up & Payment Reminder (Milestone Discipline)

Objective: Support on-time collections and reduce ageing by proactive reminders and follow-up.

Trigger / Frequency: Before each due date and for overdue customers.

Inputs:

- Payment schedule and due list from CRM/Accounts
- Reminder templates (FMT-11) and commitment note (FMT-12)
- Customer communication history (REG-12)

Step-by-step:

[ ] Review due list daily; prioritize high-value and near-overdue cases.
[ ] Send reminder 7 days before due date, 2 days before, and on due date (polite and factual).
[ ] For overdue: call customer, understand issue, take commitment date; record in REG-11.
[ ] If needed, take written commitment note (FMT-12) from customer and share with CRM/Accounts.
[ ] Escalate chronic overdue or dispute cases to SAL-M/CRM as per escalation policy.

Outputs / Evidence:

- Reminder and follow-up evidence logged
- Commitment dates captured
- Ageing reduced

Registers / Formats used: REG-11, REG-12 | FMT-11, FMT-12

Escalations:

- If overdue >15 days or customer threatens cancellation -> log in REG-14 and escalate to SAL-M same day.

Notes / Do not skip:

- Never negotiate interest/waiver verbally; waivers require approvals.

SAL SOP-13: Receipt Confirmation & ERP Allocation Coordination

Objective: Ensure customer payments are correctly acknowledged and allocated in ERP to avoid disputes.

Trigger / Frequency: After any customer payment.

Inputs:

- Payment confirmation (UTR/cheque copy)
- Accounts/CRM allocation status
- Receipt policy (bank-only)

Step-by-step:

[ ] Collect UTR/cheque details from customer and share with Accounts/CRM for verification.

[ ] Confirm official receipt is issued; share receipt copy with customer (if policy allows).

[ ] Update REG-12 communication log with receipt reference.

[ ] If allocation mismatch (wrong unit/customer): inform CRM/Accounts immediately; keep customer informed with facts.

[ ] Maintain no-cash discipline always.

Outputs / Evidence:

- Payment correctly allocated and receipted
- Customer has confirmation and trust maintained
- Audit trail available

Registers / Formats used: REG-12 | (Accounts receipt) | FMT-11

Escalations:

- If customer claims payment but not reflected in bank -> escalate to ACC-H/CRM with evidence same day.

Notes / Do not skip:

- Sales Executive should never promise allocation without confirmation from Accounts/CRM.

SAL SOP-14: Handling Cancellation / Refund Requests (First Response + Handover)

Objective: Handle cancellations professionally, capture reasons, and route to the correct approval process.

Trigger / Frequency: When customer requests cancellation/refund or indicates strong intent to cancel.

Inputs:

- Cancellation request form (FMT-15) and refund checklist (FMT-16)
- Customer payment history and agreement status
- Company refund approval matrix

Step-by-step:

[ ] Acknowledge request and capture reason (do not argue).

[ ] Request written cancellation form (FMT-15) and collect supporting documents.

[ ] Enter case in REG-14 and notify SAL-M + CRM immediately.

[ ] Do not quote refund amount/timeline unless confirmed by CRM/Accounts/legal process.

[ ] Support retention attempt only within approved policy; otherwise handover to CRM for formal settlement.

Outputs / Evidence:

- Cancellation request documented with reason
- Case handed over to CRM/Accounts with evidence
- Reduced legal risk

Registers / Formats used: REG-14 | FMT-15, FMT-16

Escalations:

- If customer threatens legal notice -> open REG-13 complaint and escalate to Legal/PM-HO through SAL-M.

Notes / Do not skip:

- Refunds require approvals; no verbal commitments.

SAL SOP-15: Customer Complaint Handling & Escalation (48-hour Rule)

Objective: Resolve customer issues quickly and escalate time-bound to prevent legal escalation and reputational damage.

Trigger / Frequency: Any complaint received via call, WhatsApp, email, in-person.

Inputs:

- Complaint details and evidence (screenshots, photos)
- Complaint register (REG-13) and acknowledgment template (FMT-13)
- Escalation matrix and timelines

Step-by-step:

[ ] Acknowledge complaint within 2 hours; issue ticket/acknowledgment (FMT-13).
[ ] Record complaint in REG-13 with category, impact, and deadline.
[ ] Attempt first-level resolution within 24-48 hrs by coordinating with CRM/Site/Accounts.
[ ] If not resolved within 48 hrs or legal notice risk: escalate to SAL-M/PM-HO as per escalation ladder.
[ ] On closure: capture closure proof and customer confirmation; update REG-13.

Outputs / Evidence:

- Complaint logged with SLA and acknowledgment
- Resolution actions tracked
- Closure evidence available

Registers / Formats used: REG-13 | FMT-13, FMT-14

Escalations:

- Complaint unresolved >48 hrs -> PM-HO/SAL-H escalation as per matrix.
- Legal notice threat -> immediate escalation to Legal Officer with evidence.

Notes / Do not skip:

- Never ignore messages; silence creates legal risk.

SAL SOP-16: RERA & Advertisement Compliance Check (Before Posting/Sending)

Objective: Ensure all sales communications and advertisements are compliant and do not create legal liability.

Trigger / Frequency: Before sending brochure/creative, WhatsApp forwards, social posts, or making written promises.

Inputs:

- Approved marketing creatives and brochure (RERA details where applicable)
- RERA registration number and disclosures (if applicable)
- Do/Don't list from POL-03

Step-by-step:

[ ] Use only latest approved creative; check RERA number, carpet area, and disclaimer present (if required).
[ ] Do not advertise unapproved amenities, approvals, or possession date.
[ ] If customer requests 'special promise' in writing -> route to SAL-M and Legal for approval.
[ ] Log major communications in REG-12 (quotation, promises, complaints).
[ ] If any doubt: hold communication and confirm with SAL-M.

Outputs / Evidence:

- Only compliant communications sent
- Reduced mis-selling risk
- Evidence trail maintained

Registers / Formats used: POL-03 | REG-12

Escalations:

- Any non-compliant marketing discovered -> report to SAL-M immediately and stop using it.

Notes / Do not skip:

- RERA compliance is non-negotiable; violations can lead to penalties.

SAL SOP-17: Channel Partner / Broker Handling (If Assigned)

Objective: Manage brokers ethically with clear lead ownership and documentation.

Trigger / Frequency: When working with channel partners or brokers for lead generation.

Inputs:

- Broker registration form (FMT-17)
- Broker register (REG-15)
- Company brokerage policy (if any)

Step-by-step:

[ ] Register broker with details and documents; record in REG-15.
[ ] Define lead ownership rules: first introduction proof, client code, visit tracking.
[ ] Avoid verbal brokerage promises; ensure written policy/approval from SAL-M.
[ ] For each broker lead: ensure lead is created in CRM with broker code and evidence.
[ ] Resolve broker disputes through SAL-M; do not negotiate on your own.

Outputs / Evidence:

- Broker database maintained
- Lead ownership disputes minimized
- Brokerage payments (if any) are auditable

Registers / Formats used: REG-15 | FMT-17

Escalations:

- Broker threatens complaints or misinformation -> escalate to SAL-M immediately with evidence.

Notes / Do not skip:

- No unethical payments or gifts; follow POL-10.

SAL SOP-18: Daily Sales Report (DCR) & Weekly Pipeline Review

Objective: Create predictable reporting and management visibility for decisions and approvals.

Trigger / Frequency: Daily end-of-day; weekly review meeting.

Inputs:

- Daily activity (calls, visits, bookings, collections follow-up)
- Pipeline stages and hot leads
- Pending approvals list

Step-by-step:

[ ] Update REG-18 DCR with calls made, follow-ups completed, site visits, key outcomes.
[ ] Highlight hot leads and next steps; list pending discount/hold/booking approvals.
[ ] Send DCR summary to SAL-M daily (WhatsApp/email).
[ ] Before weekly review: update REG-05 pipeline tracker and prepare top 10 opportunities list.
[ ] Record weekly decisions/actions in REG-18 notes.

Outputs / Evidence:

- Daily report shared with evidence
- Pipeline visibility for management
- Approvals requested with clarity

Registers / Formats used: REG-18, REG-05

Escalations:

- If target slippage risk or pipeline drop -> inform SAL-M with corrective action plan.

Notes / Do not skip:

- No reporting = no control. Maintain discipline even in low lead days.

SAL SOP-19: Marketing Event / Site Activation Execution

Objective: Execute events in a measurable way and convert attendees into qualified leads.

Trigger / Frequency: Open house, site event, corporate tie-up event, festival camp, etc.

Inputs:

- Event plan, roles, and approved creatives
- Lead capture forms (FMT-01) and event register (REG-17)
- Budget approvals (through SAL-M/PM-HO)

Step-by-step:

[ ] Confirm event objective and target audience with SAL-M; ensure approvals for spends exist.
[ ] Set up lead capture desk; capture every visitor in FMT-01 with source as event code.
[ ] Follow site safety and crowd management rules; coordinate with security/site team.
[ ] Within 24 hours: call all event leads; schedule site visits.
[ ] Update REG-17 with metrics: footfall, leads, visits scheduled, bookings.

Outputs / Evidence:

- Event leads captured with source code
- Post-event follow-up completed
- Event ROI visible

Registers / Formats used: REG-17, REG-01 | FMT-01

Escalations:

- If event creates crowd/safety risk -> coordinate with site security and stop entry if needed.

Notes / Do not skip:

- Events are only successful if follow-up happens within 24 hours.

SAL SOP-20: Post-Booking Customer Journey (Welcome, Updates, Referral)

Objective: Reduce cancellations and generate referrals by structured post-booking communication.

Trigger / Frequency: After booking/token and until handover/DLP.

Inputs:

- Welcome message template (FMT-19)
- Project update schedule (approved by PM-S/CRM)
- Referral template (FMT-20)

Step-by-step:

- [ ] Send welcome message within 24 hrs of booking (FMT-19) with next steps and contacts.
- [ ] Maintain customer communication log in REG-12 for key updates and receipts.
- [ ] Share periodic updates (only approved progress snapshots); avoid speculative dates.
- [ ] After possession/handover and issue closure: request referral/testimonial (FMT-20).
- [ ] Record referrals in REG-16 and route to SAL-M for allocation.

Outputs / Evidence:

- Lower cancellation risk
- Customer feels supported and informed
- Referrals captured with consent

Registers / Formats used: REG-12, REG-16 | FMT-19, FMT-20

Escalations:

- If customer dissatisfaction increases -> open REG-13 and escalate as per SOP-15.

Notes / Do not skip:

- Referrals should be requested only after customer is happy.

4. Policies (In-depth, One-by-One) - POL-01 to POL-12

Policies are non-negotiable rules. If SOP tells how to do, Policy tells what is allowed and what is prohibited.

SAL POL-01: No Cash / No Personal Receipt Policy

Purpose: Eliminate financial fraud risk and customer disputes by ensuring all receipts are through company bank channels only.

Scope: Applicable to all sales staff, including Sales Executive, for any customer payment (token/booking/instalment).

Do (mandatory rules):

- Share only official company bank details approved by Accounts/CRM.
- Ask customer to share UTR/cheque details for verification; route to Accounts/CRM.
- Ensure official receipt is issued and stored; log receipt reference in REG-12.

Do not (prohibited):

- Do not accept cash, personal UPI, or payment to any individual account - under any circumstance.
- Do not issue handwritten or unofficial receipts.
- Do not hold customer money for later deposit.

Evidence / Registers: REG-12 communication log + official receipt copy + bank confirmation.

Breach handling: Immediate disciplinary action; transaction treated as unauthorized; legal action if required.

Owner: ACC-H (controls) + SAL-M (enforcement)

SAL POL-02: No Verbal Discounts / No Unauthorized Commitments Policy

Purpose: Prevent mis-selling and legal disputes by ensuring only approved commitments are communicated.

Scope: All customer communications - calls, WhatsApp, emails, site visits, brochures, pricing, schemes, possession timelines.

Do (mandatory rules):

- Communicate price only from approved rate card/version (REG-07).
- Raise exceptions/discounts via SOP-08 and communicate only after written approval.
- Use approved templates for quotation and commitments; keep screenshots as evidence.

Do not (prohibited):

- Do not promise discounts, waiver, possession date, amenities, or approvals verbally.
- Do not say 'sure we will do it' unless approved in writing.
- Do not alter rate card numbers without approval trail.

Evidence / Registers: REG-08 approvals + quotation version + REG-12 communication log.

Breach handling: Customer dispute liability; warning/PIP; repeat breach may lead to termination.

Owner: SAL-M (primary) + SAL-H/PM-HO (oversight)

SAL POL-03: RERA & Advertisement Compliance Policy

Purpose: Ensure advertising and selling practices comply with RERA/consumer laws and avoid penalties.

Scope: All marketing and sales communication including social media forwards and WhatsApp creatives.

Do (mandatory rules):

- Use only approved creatives/brochure; ensure RERA registration details (if applicable) are visible.
- Use carpet area and specifications as per approved documents.
- Include disclaimers where required; state approvals status accurately.

Do not (prohibited):

- Do not advertise unapproved amenities, approvals, or misleading timelines.
- Do not use competitor defamation or false claims.
- Do not share unofficial floor plans or edited images.

Evidence / Registers: Approved creative repository + REG-12 comm logs + version control list.

Breach handling: Immediate stop-use; corrective communication; disciplinary action for repeat violations.

Owner: SAL-H/Marketing (approval) + SAL-M (control)

SAL POL-04: Customer Data Privacy & Confidentiality Policy

Purpose: Protect customer data and reduce legal risk by controlling access and sharing.

Scope: Customer phone numbers, emails, PAN/Aadhaar, bank info, agreements, KYC documents.

Do (mandatory rules):

- Store documents only in approved folders/CRM; follow naming convention.
- Share documents only with authorized internal teams (CRM/Legal/Accounts) on need basis.
- Lock devices and avoid saving PAN/Aadhaar photos in personal gallery when possible.

Do not (prohibited):

- Do not forward customer KYC to brokers/third parties.
- Do not discuss customer financial details openly on site.
- Do not use customer data for personal marketing or unrelated projects.

Evidence / Registers: Access logs + CRM attachments + documented sharing trail.

Breach handling: Disciplinary action; possible legal action depending on severity.

Owner: HR + IT/ERP Admin + SAL-M

SAL POL-05: CRM Hygiene & Evidence Policy (If Not in CRM, Not Done)

Purpose: Create an auditable sales system and prevent lead leakage.

Scope: Lead creation, follow-ups, visits, quotations, approvals, complaints, booking updates.

Do (mandatory rules):

- Update CRM daily with next action and stage.
- Maintain REG-01/02/03/05 registers in sync with CRM.
- Attach approvals and key communication screenshots in CRM for hot deals and discounts.

Do not (prohibited):

- Do not keep leads in personal diary only.
- Do not change stage without reason/notes.
- Do not delete leads or hide missed follow-ups.

Evidence / Registers: CRM reports + REG-18 DCR + register entries.

Breach handling: KPI penalty; repeated non-compliance leads to PIP.

Owner: SAL-M

SAL POL-06: Communication & WhatsApp Discipline Policy

Purpose: Ensure professional communication and avoid misunderstandings.

Scope: Calls, WhatsApp messages, emails and in-person discussions.

Do (mandatory rules):

- Use approved templates for quotation, reminders, complaint acknowledgment.
- Write clear messages: unit, project, amount, due date; avoid vague words.
- Keep important commitments on email/official WhatsApp and log in REG-12.

Do not (prohibited):

- Do not send angry/late-night messages; avoid emotional language.
- Do not argue with customers on WhatsApp; escalate instead.
- Do not delete message threads related to approvals or complaints.

Evidence / Registers: REG-12 communication log + WhatsApp/email screenshots.

Breach handling: Warning; repeated misconduct affects appraisal and incentives.

Owner: SAL-M + HR

SAL POL-07: Discount Approval & Documentation Policy

Purpose: Control pricing leakage and ensure discount decisions are traceable.

Scope: All discounts, waivers, special schemes, payment plan deviations, PLC waivers.

Do (mandatory rules):

- Use SOP-08 and FMT-06 for every request with evidence.
- Record approval in REG-08 and attach screenshot/email in CRM.
- Communicate approved decision clearly with validity period.

Do not (prohibited):

- Do not provide discount in exchange for cash or personal favor.
- Do not extend discount beyond validity without fresh approval.
- Do not change unit after approval without reconfirming discount.

Evidence / Registers: REG-08 + approved quotation copy + CRM attachment.

Breach handling: Revenue loss recovery may be applied; disciplinary action for fraud.

Owner: SAL-H/PM-HO (oversight) + SAL-M (control)

SAL POL-08: Booking & Allocation Integrity Policy

Purpose: Prevent double-selling, inventory conflicts and customer disputes.

Scope: Unit blocking, booking, allotment communications and availability sharing.

Do (mandatory rules):

- Confirm availability only from latest inventory system/CRM.
- Record holds in REG-06 with expiry and conditions.
- Share official booking acknowledgement after receipt confirmation.

Do not (prohibited):

- Do not promise a unit that is not available or on hold.
- Do not change allotment verbally; all changes must be recorded and approved.
- Do not accept token before confirming unit availability and approvals.

Evidence / Registers: REG-06 hold register + REG-09 booking register + inventory screenshots.

Breach handling: Customer dispute liability; corrective action and disciplinary steps.

Owner: SAL-M + CRM

SAL POL-09: Cancellation / Refund Handling Policy

Purpose: Handle cancellations consistently and legally, minimizing disputes and leakage.

Scope: All cancellation/refund requests at any stage.

Do (mandatory rules):

- Capture written cancellation request (FMT-15) and record in REG-14.
- Handover to CRM/Accounts for settlement workflow and approvals.
- Maintain respectful communication; attempt retention only within approved policy.

Do not (prohibited):

- Do not commit refund amount or timeline without confirmation.
- Do not negotiate penalty/waiver verbally.
- Do not delay acknowledgment; delay increases legal risk.

Evidence / Registers: REG-14 + CRM settlement file + approvals.

Breach handling: Process deviation leads to audit observations and disciplinary action.

Owner: CRM + ACC-H + Legal (as required)

SAL POL-10: Broker / Channel Ethics & Anti-Bribery Policy

Purpose: Ensure ethical sales and avoid reputational and legal risks.

Scope: Channel partners, brokers, gifts, commission discussions, influence tactics.

Do (mandatory rules):

- Register brokers (REG-15) and follow approved brokerage policy only.
- Report any bribery demand or unethical request to SAL-M immediately.
- Maintain professional conduct and transparency.

Do not (prohibited):

- Do not pay or accept bribes/gifts for approvals, allotments or discounts.
- Do not share confidential project/customer data with brokers.
- Do not make commitments on behalf of the company without approval.

Evidence / Registers: REG-15 + written brokerage approvals (if any).

Breach handling: Zero tolerance; termination and legal action if needed.

Owner: OWN/PM-HO + HR

SAL POL-11: Site Visit Safety & Visitor Control Policy

Purpose: Protect customers and staff during site visits by enforcing safety controls.

Scope: All site visits, site office visits, and walk-ins at construction site.

Do (mandatory rules):

- Follow visitor registration and safety briefing (FMT-18).
- Ensure customer uses PPE where required and stays in safe zones.
- Coordinate with site team and security for access.

Do not (prohibited):

- Do not take visitors into hazardous/restricted areas.
- Do not allow children/elderly into unsafe zones without site approval.
- Do not bypass barricading/signage or safety instructions.

Evidence / Registers: REG-03 visit register + visitor safety sheet + security log.

Breach handling: Immediate stop of visits; disciplinary action for negligence.

Owner: PM-S/SAFE (site) + SAL-M

SAL POL-12: Incentive & Clawback Policy (Collections-Linked)

Purpose: Align sales incentives with real cash collections and protect the company against cancellations/bounces.

Scope: Sales Executive incentive/variable payouts.

Do (mandatory rules):

- Compute incentive on collections as per approved tier structure (Appendix B).
- Maintain evidence for collections mapping and customer allocation.
- Apply clawback on cancellations/cheque bounces as per policy.

Do not (prohibited):

- Do not demand incentive on only booking amount without collections.
- Do not manipulate stage/booking date to claim incentive.
- Do not hide cancellations or refunds.

Evidence / Registers: Collections report + REG-09 booking register + cancellation register REG-14.

Breach handling: Incentive reversal and disciplinary action for manipulation.

Owner: SAL-H + ACC-H + HR

5. Registers (One-by-One) - REG-01 to REG-18

Registers are the minimum audit trail for sales operations. Print templates for sales file and maintain digital scans/CRM attachments.

SAL REG-01: Lead Register & Source Coding

Purpose: Master list of all inquiries with source and status.

Frequency: Daily | Owner: Sales Executive

Date	Lead Name	Mobile	Source/Campaign	Requirement	Stage	Next Action/Date

SAL REG-02: Call Log & Follow-up Register

Purpose: Track call attempts, outcomes and next follow-up.

Frequency: Daily | Owner: Sales Executive

Date	Lead	Call/Msg	Outcome	Next Action/Date	Remarks

SAL REG-03: Site Visit Register

Purpose: Record all site visits with safety compliance and outcome.

Frequency: Daily | Owner: Sales Executive

Date	Lead	Visit Time	Unit Shown	Feedback/Outcome	Next Step

SAL REG-04: Lead Qualification Scorecard Register

Purpose: Standardize qualification and lead temperature scoring.

Frequency: Per lead **|** Owner: Sales Executive

Lead	Budget	Timeline	Funding	Fit Score (1-5)	Hot/Warm/Cold	Notes

SAL REG-05: Pipeline Stage Tracker (Weekly)

Purpose: Weekly pipeline view for review with SAL-M.

Frequency: Weekly **|** Owner: Sales Executive/SAL-M

Week	New	Contacted	Qualified	Visited	Negotiation	Booked	Remarks

SAL REG-06: Inventory Hold / Unit Blocking Register

Purpose: Prevent double-selling by tracking holds and expiry.

Frequency: As required **|** Owner: Sales Executive/SAL-M

Date	Unit	Customer	Hold Till	Approved By	Status	Remarks

SAL REG-07: Rate Card & Competitor Note Register (Version Control)

Purpose: Track which rate card version was used and market notes.

Frequency: As revised **|** Owner: SAL-M/Sales Executive

Version Date	Version No.	Key Changes	Competitor Notes	Used By	Remarks

SAL REG-08: Discount / Scheme Request Register (Approval Trail)

Purpose: Track discount requests, approvals and communication.

Frequency: As required | Owner: Sales Executive/SAL-M

Date	Customer	Unit	Request	Justification/Evidence	Decision	Approved By

SAL REG-09: Booking Register (Token to Booking)

Purpose: Track booking details and token/payment confirmation.

Frequency: As bookings happen | Owner: Sales Executive/CRM

Date	Customer	Unit	Token Amount	Payment Mode/UTR	Receipt Ref	Status

SAL REG-10: KYC & Document Checklist Register

Purpose: Ensure booking packs are complete for agreement/loan.

Frequency: Per booking | Owner: Sales Executive/CRM

Customer	PAN	Aadhaar	Photo	Address Proof	Co-buyer Docs	Remarks

SAL REG-11: Collections Follow-up & Ageing Register

Purpose: Track due/overdue follow-ups and commitments.

Frequency: Daily | Owner: Sales Executive/CRM

Customer	Due Date	Due Amount	Follow-up Date	Commitment Date	Status	Remarks

SAL REG-12: Customer Communication Log (WhatsApp/Email References)

Purpose: Maintain evidence of key communications, quotations, approvals and confirmations.

Frequency: Daily **|** Owner: Sales Executive

Date	Customer	Topic	Channel	Reference/Screenshot Link	Next Action

SAL REG-13: Complaint & Escalation Register (SLA)

Purpose: Track complaints with 48-hr SLA and escalation trail.

Frequency: As received **|** Owner: Sales Executive/CRM

Date	Customer	Issue	Severity	Owner	Target Closure	Status

SAL REG-14: Cancellation / Refund Request Register

Purpose: Track cancellation requests and handover to CRM/Accounts.

Frequency: As received **|** Owner: Sales Executive/CRM

Date	Customer	Unit	Reason	Handover To	Status	Remarks

SAL REG-15: Channel Partner / Broker Register

Purpose: Maintain broker details, lead codes and dispute control.

Frequency: As required **|** Owner: Sales Executive/SAL-M

Broker Name	Mobile	Area	Documents/KYC	Lead Code	Status	Remarks

SAL REG-16: Referral & Testimonial Register

Purpose: Track referrals/testimonials with customer consent.

Frequency: As received | Owner: Sales Executive

Date	Customer (Source)	Referral Name	Mobile	Project Interest	Status	Remarks

SAL REG-17: Marketing Event / Site Activation Register

Purpose: Track event footfall, leads, visits and outcomes.

Frequency: Per event | Owner: Sales Executive/SAL-M

Event Date	Event Name	Footfall	Leads Captured	Visits Scheduled	Bookings	Remarks

SAL REG-18: Daily Sales Report (DCR) & Weekly Review Minutes

Purpose: Daily activity reporting and weekly review decisions log.

Frequency: Daily/Weekly | Owner: Sales Executive/SAL-M

Date/Week	Calls	Visits	Bookings	Key Issues	Approvals Needed	Next Day Plan

6. Formats & Templates (One-by-One) - FMT-01 to FMT-20

Formats are printable templates for consistent execution. Use these templates as minimum fields; CRM can be used for digital capture.

SAL FMT-01: Inquiry / Lead Capture Form

Purpose: Capture complete lead details for CRM entry.

Field / Item	Entry / Notes
Date & Time	
Lead Name	
Mobile No.	
Alternate No.	
Email	
Location/City	
Requirement (BHK)	
Budget Range	
Preferred Visit Date	
Lead Source/Campaign	
Notes/Objections	

SAL FMT-02: First Call Script & Qualification Sheet

Purpose: Standardize first call and capture key qualifiers.

Field / Item	Entry / Notes
Introduction line	
Requirement questions (BHK, budget, location)	
Timeline to buy	
Funding (self/loan)	
Decision maker details	
Top 3 priorities	
Objections heard	
Next action committed (visit/quotation)	
Follow-up date/time	

SAL FMT-03: Site Visit Confirmation Message Template

Purpose: Confirm visit details and set expectations.

Field / Item	Entry / Notes
Customer Name	
Project/Site Address (Google pin)	

Visit Date & Time	
Contact person/mobile	
Parking note	
Documents to carry (optional)	
Safety note (PPE/closed shoes)	
Reschedule instructions	

SAL FMT-04: Site Visit Feedback / Requirement Update Form

Purpose: Record visit feedback and updated requirement.

Field / Item	Entry / Notes
Customer Name	
Visit Date	
Units shown	
Liked points	
Concerns/objections	
Budget alignment	
Family decision status	
Competitor considered	
Next step & date	
Sales Exec notes	

SAL FMT-05: Quotation / Offer Email Template (Rate Card Controlled)

Purpose: Share approved price clearly with version control.

Field / Item	Entry / Notes
Subject line template	
Customer name	
Unit details (tower/floor/carpet)	
Base rate and floor rise	
Parking/PLC	
Taxes/charges disclaimer	
Payment plan summary	
Validity period	
Approval note (discount requires written approval)	
Attachments list (brochure/rate card)	

SAL FMT-06: Discount / Scheme Request Note (Internal)

Purpose: Request approval for discount/scheme with evidence.

Field / Item	Entry / Notes
Date	

Customer name & mobile	
Unit requested	
Rate card version	
Discount/scheme requested	
Justification	
Competitor evidence (if any)	
Expected closure date	
Recommended action (optional)	
SAL-M decision	
Approval proof reference	

SAL FMT-07: Unit Blocking / Hold Request Form

Purpose: Record hold request and approval with expiry.

Field / Item	Entry / Notes
Date	
Unit details	
Customer name	
Hold till (date/time)	
Conditions (token amount)	
Approved by (SAL-M)	
Communication sent to customer (yes/no)	
Remarks	

SAL FMT-08: Booking Checklist (Pre-booking)

Purpose: Ensure readiness before taking token/booking.

Field / Item	Entry / Notes
Unit availability confirmed	
Final quotation shared	
Discount approval attached (if any)	
Customer KYC initiated	
Payment mode confirmed (bank/cheque)	
Customer acknowledgement of payment schedule	
CRM booking entry created	
Next steps explained	

SAL FMT-09: Booking Acknowledgement Letter (Token)

Purpose: Acknowledge token/booking and define next steps.

Field / Item	Entry / Notes
Date	

Customer name	
Unit details	
Token amount & mode	
Receipt reference	
Payment schedule next milestone	
Agreement timeline (tentative)	
Contact details (CRM/Sales)	
Disclaimer (subject to approvals/policy)	

SAL FMT-10: KYC Document Request Checklist (Customer)

Purpose: Collect all required documents for agreement/loan.

Field / Item	Entry / Notes
PAN card copy	
Aadhaar/ID proof	
Address proof	
Passport size photo	
Co-buyer documents	
Nominee details	
Bank statement/ITR (if loan)	
Any special document (NRI/POA)	

SAL FMT-11: Payment Reminder / Demand Message Template

Purpose: Send polite and clear reminders with due details.

Field / Item	Entry / Notes
Customer name	
Unit	
Due amount	
Due date	
Payment modes & bank details reference	
Receipt process note	
Support contact	
Escalation note for delays (polite)	

SAL FMT-12: Collection Commitment Note (Customer Confirmation)

Purpose: Record customer commitment date for overdue payment.

Field / Item	Entry / Notes
Date	
Customer name	
Unit	

Overdue amount	
Reason for delay	
Committed payment date	
Mode of payment	
Customer signature/confirmation (email/WhatsApp)	
Sales Exec signature	

SAL FMT-13: Complaint Acknowledgement & Ticket Template

Purpose: Acknowledge complaint and set SLA.

Field / Item	Entry / Notes
Ticket no.	
Date & time	
Customer name	
Issue summary	
Severity	
Owner	
Target response time	
Target closure date	
Contact details	
Notes	

SAL FMT-14: Escalation Message Format (Company Standard)

Purpose: Standard escalation format for quick decisions.

Field / Item	Entry / Notes
Subject: Escalation - [Category] - [Customer/Unit] - [Date]	
Issue summary (one line)	
Impact: Time/Cost/Reputation (quantify)	
Evidence: screenshot/receipt/record ref	
Action taken so far	
Support/Decision required + deadline	

SAL FMT-15: Cancellation Request Form

Purpose: Capture written cancellation request and reason.

Field / Item	Entry / Notes
Date	
Customer name	
Unit	
Reason for cancellation	
Request type (cancel/refund/transfer)	

Supporting documents attached	
Customer signature	
Received by (Sales/CRM)	
Remarks	

SAL FMT-16: Refund / Settlement Handover Checklist (Internal)

Purpose: Handover cancellation/refund case to CRM/Accounts with completeness.

Field / Item	Entry / Notes
Cancellation form received (FMT-15)	
Payment history attached	
Agreement status	
Outstanding dues/adjustments	
Approval required level	
Customer bank details verification	
Communication log attached	
Settlement calculation prepared by Accounts	
Final approval proof	

SAL FMT-17: Channel Partner / Broker Registration Form

Purpose: Register broker with compliance details.

Field / Item	Entry / Notes
Broker name	
Mobile	
Office address	
Area served	
GST (if any)	
PAN	
Bank details (if brokerage)	
Lead ownership rules accepted	
Approved by (SAL-M)	
Remarks	

SAL FMT-18: Site Visit Safety Briefing Sheet (Visitor Control)

Purpose: Record that visitor received safety briefing and followed PPE rules.

Field / Item	Entry / Notes
Date	
Visitor name	
Mobile	
Purpose (site visit)	

PPE issued (yes/no)	
Restricted zones explained	
Escort name	
Visitor signature	
Security/signature	

SAL FMT-19: Post-Booking Welcome Message Template

Purpose: Welcome booked customer and set structured next steps.

Field / Item	Entry / Notes
Customer name	
Unit	
Receipt reference	
Next milestone due date	
KYC pending list	
Agreement timeline (tentative)	
Customer support contacts	
Update frequency note	

SAL FMT-20: Referral / Testimonial Request Template

Purpose: Request referral/testimonial with consent.

Field / Item	Entry / Notes
Customer name	
Thank you note	
Request for referral contact details	
Consent line for contacting referral	
Testimonial request (optional)	
Google review link (if applicable)	
Follow-up date	

Appendix A: Quick Reference - Authority Boundaries & Escalation Triggers (Sales)

Use this page when you are unsure who can approve. When in doubt, pause and ask SAL-M.

- **Customer pricing / discount / scheme:** Initiate by SAL-M; recommend by SAL-H/PM-HO; approve by OWN (or DIR). Sales Executive cannot approve.
- **Customer receipt & allocation:** Handled by CRM/Accounts; receipts only via bank; daily reconciliation.
- **Refund / cancellation settlement:** Initiated by CRM; reviewed by ACC-H/PM-HO; approved by OWN (or DIR). Sales Executive only collects request and evidence.

Escalation triggers (time-bound):

- Customer complaint unresolved >48 hours OR legal notice risk -> escalate to SAL-M/PM-HO immediately with evidence.
- Any payment/receipt dispute -> escalate to ACC-H/CRM same day with UTR/receipt references.
- Any safety issue during site visit -> stop visit and inform site safety/PM-S immediately.

Mandatory escalation message format:

Follow FMT-14. Always include: customer/unit, impact, evidence reference (screenshot/link), actions taken, and decision needed with deadline.

Appendix B: Incentive & Clawback Quick Guide (Sales Executive)

Refer to the Swara Salary Grade Structure & Policy Pack for the official policy. Summary below is for quick reference.

Fixed salary (Sales Executive - L2): Typical band 30k / 38k / 45k per month (A/B/C band) as per policy pack.

Incentive concept (example): Incentive on **collections** (safer than bookings).

- 100% target achieved: 0.50% on collections
- 120%+ target achieved: 0.75% on collections
- 150%+ target achieved: 1.00% on collections
- Payout frequency: monthly or quarterly (company decision).
- Clawback: cancellation/cheque bounce -> adjust in next payout.

Control rule: Incentive must be backed by collections report and mapping to your customer allocation (REG-09/REG-11).

Appendix C: 30-60-90 Day Onboarding Plan (Sales Executive)

Goal: Become independent on lead handling, site visits, booking discipline, and compliance.

First 30 days (Foundation)

- Understand product: unit mix, carpet areas, amenities, approvals status, payment plan.
- Read and sign POL-01 to POL-12; practice SOP-01 to SOP-05 with SAL-M.
- Get CRM access; learn lead stages and mandatory fields; start maintaining REG-01/02/03 daily.
- Shadow 10 site visits; learn objection handling and compliance language (no false promises).

Day 31-60 (Execution)

- Handle your own lead bucket; achieve SLA for first call and follow-ups.
- Conduct site visits independently with safety compliance; maintain visit feedback forms.
- Prepare quotations using rate card version control; raise at least 5 discount requests through SOP-08 (practice discipline).
- Coordinate 3-5 bookings with complete KYC and receipt confirmations (with CRM/Accounts).

Day 61-90 (Ownership)

- Maintain stable pipeline with weekly tracker and DCR discipline.
- Improve conversion ratios and reduce lead leakage; propose improvement actions to SAL-M.
- Support collections follow-up with measurable reduction in overdue ageing.
- Start referral/testimonial capture for satisfied customers.

End of onboarding review: SAL-M to review KPI scorecard evidence and confirm role readiness.