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Regulations for recording work performance (CRM Report Preparation Regulations)

To All Sales Teams and Office Managers,

Your teamwork and collaboration play a crucial role in generating revenue and driving growth. Thank you for your unwavering commitment to achieving our company's goals.

As per CEO, we are reminding all sales employees that it is required that you utilize the CRM to document all sales activities with your customers and prospective customers and report deadlines.

Please see below for further explanation regarding this and clarification on your required regular scheduled work hours.

- **Regulations for recording work performance (CRM Report Preparation Regulations)**

1. **Sales Representatives:** Must conduct direct sales activities for customers in their business area for a minimum of 6 hours per day and record the sales activity in the CRM in detail including the name(s) of the individual(s) you contacted along a synopsis of any communication that occurred during the customer visit (collection of information about customers), and your check in and out time with the customer immediately after the customer visit.

You are required to work an 8-hour schedule with a minimum of a 30-minute unpaid meal break on your regularly scheduled workdays Monday through Friday. You must record your work hours with your daily start time, start and end time of your unpaid meal break and the time that you conclude your workday in the CRM.

2. **Regional Directors, Branch Sales Managers and Junior Sales Managers:** Must conduct direct sales activities for customers in their business area for a minimum of 5 hours per day and record the sales activity in the CRM in detail including the name(s) of the individual(s) you contacted along a synopsis of any communication that occurred during the customer visit (collection of information about customers) and your check in and out time with the customer immediately after the customer visit.

You are required to work an 8-hour schedule with a minimum of a 30-minute unpaid meal break on your regularly scheduled workdays Monday through Friday. You must record your work hours with your daily start time, start and end time of your unpaid meal break and the time that you conclude your workday in the CRM.

In case of violation of the above, a first warning letter will be sent, and if a second violation occurs a second warning letter will be sent or the employee may be subject to termination of employment. If an employee intentionally recorded false information, the employee will be terminated.

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- **Daily Business Plan Submission Rules**
Submit the daily business plan to the Office Manager/Administrative Assistant in charge by 8:00 am/before the start of the business day. The daily plan should record the name of the guest scheduled to visit on the day, the purpose of the visit, and the scheduled time of the visit.
- **Weekly Business Plan Submission Regulations**
Prior to the start of the business day on Monday, submit the current week's business plan Office Manager/Administrative Assistant in charge. The weekly sales plan should record the previous week's goals and achievements, the names of customers scheduled to visit for the week, the purpose of the visit, the sales strategy for each customer, and the weekly performance targets.
- **Monthly Business Plan Submission Regulations**
On the first day of each month, the monthly business plan including the previous month's goals, achievements, and reports on the reasons for the failure must be submitted to Office Manager/Administrative Assistant.
- **3 Month Business Plan Submission Regulations**
On the first day of each month, the 3 month business plan and the previous month's goals, achievements, and reports on the reasons for the failure must be submitted to the Office Manager/Administrative Assistant.
- **Daily, Weekly, Monthly and 3-month Business Plan report plans**
Daily, Weekly, Monthly reports and 3-month plans must be submitted on time. If you do not submit your reports by the deadline, you will be subject to disciplinary action and/or your employment may be subject to termination.

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