

Sales & Service Co-Ordinator

This book serves as the complete **SOP and reference guide** for the **Sales and Service Coordinator** role at **Upastra Digital Media**. It defines the purpose, workflows, and responsibilities of the team members who ensure that every client project transitions smoothly from the initial inquiry and sales stage to successful delivery and post-project communication.

- [General Things](#)
 - [How to qualify a lead? \(Qualified \)](#)
 - [How to put a client in Hot Lead label?](#)
 - [How to decide a project budget?](#)
 - [How to send a detailed Offer? \(Offer Sent \)](#)
 - [Follow ups after offer sent](#)
 - [How to put order under review](#)
 - [How to Add Orders in Discord \(Revised \)](#)
 - [How to Properly Update Past Client Changes - Documentation Issue](#)
- [Project type](#)
 - [Past Client Changes Project](#)
 - [New Client Changes Project](#)
 - [Fiverr Chat SOP - Website Redesign Projects](#)
 - [New Website From Scratch](#)
- [Direct Orders](#)
 - [Requirement Submitted](#)
 - [Full Incomplete Requirements](#)
 - [Partial Incomplete Requirements](#)
- [Industry Wise Questions](#)

- [Bussiness Website \(Cleaning, Consulting, Roofing etc \)](#)
 - [E commerece Website](#)
 - [Courses website](#)
 - [Real Estate](#)
 - [Membership website](#)
-
- [Hosting & Domain Setup SOP](#)

General Things

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How to put a client in Hot Lead label?

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How to decide a project budget?

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How to send a detailed Offer? (Offer Sent)

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Follow ups after offer sent

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How to put order under review

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General Things

How to Properly Update Past Client Changes - Documentation Issue

Project type

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Past Client Changes Project

Project type

New Client Changes Project

Project type

Fiverr Chat SOP – Website Redesign Projects

Objective

Convert redesign inquiries into **clear-scope paid orders** without mockups, confusion, or underpricing.

Step 1: First Reply (Control the Frame)

Purpose: Establish authority.

- Thank the client
- Say you'll review their website + competitors first
- Do **not** discuss price or mockups

Rule:

No pricing. No mockups. No promises.

Step 2: Website & Competitor Review

Ask the client for:

- Current website link
- Competitors they like or want to compete with

Internally identify:

- Minimal vs content-heavy
 - Events vs services
 - Booking vs inquiry focus
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Step 3: Pages Discovery (Mandatory)

Ask:

- “Please list the pages you want on the new website.”

Rules:

- Client lists pages
 - Sales refines structure
 - Do not blindly agree
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Step 4: Design Direction Lock

Ask:

- “Which competitor do you like most in terms of design?”

Rules:

- Lock **one** primary inspiration
 - Others are reference only
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Step 5: Homepage Embedding Clarification

If client wants everything on homepage:

- Visually embed content
- Keep proper structure in background

Rule:

- Embedded content \neq removed pages
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Step 6: Budget Alignment

Ask **after scope only**:

- “Do you have a budget range in mind?”

Rules:

- Stay factual
- No emotional justification
- Adjust scope, not quality

Step 7: Mockup Objection

If client asks for mockups:

- Explain design is done directly in WordPress
- No mockups before order

Rule:

- Never provide free mockups
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Step 8: Scope Confirmation

Before sending offer, confirm:

- Design direction
 - Pages list
 - Focus (events / services)
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Step 9: Custom Offer Sent

Offer must include:

- Pages
- Design direction
- Delivery time
- Fixed price

Close with:

- “Once the order is placed, we’ll get started.”
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Hard Rule

If it’s not written in chat, it doesn’t exist.

Project type

New Website From Scratch

Direct Orders

Direct Orders

Requirement Submitted

Direct Orders

Full Incomplete Requirements

Direct Orders

Partial Incomplete Requirements

Industry Wise Questions

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Bussiness Website (Cleaning, Consulting, Roofing etc)

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E commerce Website

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Courses website

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Real Estate

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Membership website

Hosting & Domain Setup SOP

Purpose: Standardize how the team identifies hosting scenarios and moves clients to the correct next step (access or 15-minute setup call) without losing time or affiliate opportunities.

<https://kommodo.ai/embed/recordings/ctF1n4sEyC32mE33JGyl?onlyRecording=1>