

**Welcome to the Look Local team** and congratulations on creating your own company as part of our national organisation. It is a step that many wish to take and many regret not taking, you have done so and we know that you will be successful as we have been through exactly what you will experience in the coming years. There is no need to 'reinvent the wheel' when you have the knowledge and experience to hand. You only need the desire to achieve.

Together we will establish Look Local as a national brand serving local communities and providing the vehicle for local traders and other local businesses to communicate with their customers.

Together we will help you establish your part of our national organisation serving your community.

By the time you leave us today you will have the base knowledge required to get started on your own Look Local. Following today's training, we will be on hand to answer any questions that you have as you begin and we will continually help you, supporting the growth of your Franchise.

Our agenda for the day will be as follows:-

- *Meet at our Training Office for preliminary discussions*
- *Receive our briefing and overview of the Franchise business*
- *Receive your Franchise Pack*
- *Receive your initial training*
- *Summary and initial goals*

We anticipate that the process should take around three hours.

Your welcome pack includes the following:-

- 1.** Your copy of the Look Local Confidentiality Agreement.
- 2.** Your copy of the Look Local Franchise Agreement.
- 3.** Your copy of the Look Local Franchisee Manual.
- 4.** CRM manual
- 5.** Advert and stationery templates.

In addition to this all you need is a computer, internet access, a version of MS Office, a compatible graphic design software, we recommend Corel Draw v.14 (or higher) and your Look Local branded stationery.

Bear in mind that you are now part of the Look Local team and not on your own. Together we look forward to a long and successful relationship.

<b>1</b>	<b>Getting started.....</b>	<b>4</b>
1.1	<b>Office stationery and equipment.....</b>	<b>4</b>
1.1.1	Stationery .....	4
1.1.2	Answer Machine .....	4
1.1.3	Equipment .....	4
1.1.4	Look Local branded business stationery. ....	5
1.2	<b>Look Local website.....</b>	<b>6</b>
1.2.1	Your website.....	6
1.2.2	Pricing Structure on your website.....	6
1.2.3	Franchisee area .....	7
1.3	<b>Company registration .....</b>	<b>8</b>
1.4	<b>VAT.....</b>	<b>8</b>
1.4.1	What is VAT? .....	8
1.4.2	When must I register for VAT .....	8
1.4.3	VAT registration .....	9
1.5	<b>Insurance .....</b>	<b>9</b>
1.5.1	Employers Liability .....	9
1.5.2	Public Liability .....	9
1.6	<b>Hardware and software requirements.....</b>	<b>11</b>
1.6.1	Computer system requirements .....	11
1.6.2	CorelDRAW® Graphics Suite 14 .....	11
1.6.3	Internet .....	12
1.6.4	Email.....	13
1.6.5	Banking .....	13
<b>2</b>	<b>Workflow .....</b>	<b>14</b>
2.1	<b>Sales your Inaugural edition.....</b>	<b>14</b>
2.1.1	Generating customers.....	14
2.1.2	Unique selling points (USP's).....	14
2.1.3	Business sectors.....	15
2.1.4	Telephone introduction .....	16
2.1.5	The first phone call.....	16
2.1.6	Follow up call .....	16
2.1.7	Negative objections:.....	17
2.1.8	Overcome the objections: .....	17
2.1.9	Personal introduction .....	18
2.1.10	'Don't sell, tell' .....	18
2.1.11	Mail shots .....	18
2.2	<b>Subsequent editions.....</b>	<b>19</b>
2.2.1	Repeat adverts .....	19
2.2.2	Monthly emails .....	19
2.2.3	Monthly calls.....	19
2.2.4	Monthly Sales Cycle.....	20
2.2.5	Advert amendments.....	21
2.2.6	Taking orders.....	21
2.2.7	Forms .....	21
2.2.8	Administration forms .....	22
<b>3</b>	<b>Centralised Printing.....</b>	<b>23</b>
3.1	<b>Pagination.....</b>	<b>23</b>
3.2	<b>Coordinating with the printer and their requirements .....</b>	<b>25</b>
3.2.1	Converting Fonts.....	25
3.2.2	Supplying a PDF when using CorelDraw .....	25
3.2.3	Saving PDF Settings .....	31
3.2.4	Re-using saved PDF settings .....	31
3.2.5	Uploading your artwork to the printer .....	32
3.2.6	Confirming your print order .....	32

<b>4</b>	<b>Delivery of Look Local .....</b>	<b>33</b>
4.1	Organising the delivery of Look Local .....	33
4.2	Child deliverers .....	33
4.3	Adult deliverers.....	34
4.4	Delivery Payments .....	34
4.4.1	Pay structure .....	34
4.4.2	Paying your deliverers .....	34
<b>5</b>	<b>Contracts and pricing .....</b>	<b>36</b>
5.1.1	Twelve month contracts.....	36
5.1.2	Benefits to customers on 12 month contracts:.....	36
5.1.3	Pricing policy.....	36
<b>6</b>	<b>Accounts.....</b>	<b>38</b>
6.1	How the customer makes payment .....	38
6.2	Customer Payments Credit/Debit Card .....	39
6.2.1	Accepting Card Payments by Telephone: .....	39
6.2.2	Accepting Card Payments by Fax: .....	39
6.2.3	Accepting Card Payments by Email .....	39
6.2.4	Accepting Card Payments by Letter:.....	39
6.2.5	Accepting Card Payments in Person:.....	40
6.2.6	Transmitting Credit Card Data:.....	40
6.2.7	Data Storage:.....	40
6.2.8	Office Equipment and Security:.....	40
6.2.9	Franchisee CRM Accounts:.....	40
6.3	Customer Payments by Direct Debit.....	41
<b>7</b>	<b>Customer Relationship Management (CRM).....</b>	<b>42</b>
7.1	Webchise .....	42
7.2	Webchise User manual.....	43
7.2.1	Creating a New Company .....	43
7.2.2	Creating a Contact within a Company .....	43
7.2.3	Sending the pricing template email .....	44
7.2.4	Setting a Follow up Call.....	45
7.2.5	Creating a Booking .....	46
7.2.6	Create the Invoice.....	47
7.2.7	Creating an Order .....	48
7.2.8	Banking Payments .....	49
7.2.9	Registering Cheque and Cash Payments .....	49
7.2.10	.....	49
7.2.11	Expense Payments .....	50
7.2.12	Marking Monthly Invoices as Paid .....	50
7.2.13	Reconciling Bank Transactions .....	51
7.2.14	Marketing Campaigns .....	52
7.2.15	Creating a Target List.....	52
7.2.16	Creating a Campaign .....	53
7.2.17	Newsletter Campaigns.....	54
7.2.18	Email Campaigns .....	55
7.2.19	Telesales Campaigns .....	56
<b>8</b>	<b>Support .....</b>	<b>58</b>
8.1.1	www.looklocal.com.....	58
8.1.2	Email.....	58
8.1.3	Telephone.....	58
8.1.4	Skype .....	58
8.1.5	Webchise Support .....	58
<b>9</b>	<b>Forms.....</b>	<b>59</b>

# **1 Getting started**

## **1.1 Office stationery and equipment**

Before approaching potential customers, it is important to prepare and set up your office or work space. Look Local recommend purchasing the following items listed below. All business stationery with the Look Local logo mentioned in this manual must be purchased from head office. All the forms mentioned can be downloaded via the website [www.looklocal.com](http://www.looklocal.com) and login in to the franchisee area.

### **1.1.1 Stationery**

Ball Point Pens  
1 ream (500 sheets) of paper  
500 C5 envelopes  
Bluetak  
A4 Plain Notepad  
15 A4 Clear Plastic Pockets

All of the above are available from various stationery suppliers. A company called Viking Direct [www.vikingdirect.co.uk](http://www.vikingdirect.co.uk) are ones that we can suggest. It would be worth calling them to order a catalogue free of charge on 0800 424444

### **1.1.2 Answer Machine**

You will need a telephone answer machine. You should put a message on the answer machine which tells the person calling that they are through to Look Local, it is advised not to use a standard BT or similar answer machine message as this come over less professional and the caller won't really be sure if they are leaving a message for the correct person, if you divert the call to a mobile be sure to personalise the voice mail message.

### **1.1.3 Equipment**

Fax Machine (or PC with fax capability)  
Telephone with Answer Machine (or combined Telephone/Fax/Answer Machine)  
Delivery Bags x 10 (Call Bolmoor on 08450 601602) the Branded Look Local bag will cost approx £7.00 + vat & postage. You will need to pay by credit/debit card when placing your order.

#### **1.1.4 Look Local branded business stationery.**

You will need to complete and return the 'Stationery Starter Pack Information Form. SSP' found in the appendices area of this manual; once this is completed you will be sent a proof of your Look Local business stationery, make sure to check that all information on the proof is correct and then advise us that we can send the artwork to print.

Once you have approved the artwork you will receive your stationery starter pack within 14 days.

1000 Business Cards, 1000 Compliment Slips and 1000 Letterheads  
*(Cost £170 + VAT + Delivery)*

When you require more business stationery you can order each item as you require from head office. **You must only use Head Office to print your Look Local branded business stationery**, please place your order via head office.

## 1.2 Look Local website

Look Local have a central website [www.looklocal.com](http://www.looklocal.com) this is the website that all Look Local web traffic is steered through giving your own web pages maximum exposure.

### 1.2.1 Your website

As part of your Look Local franchise you will have a 5 page 'mini website' where other businesses can find out more about you, where you distribute to, how to contact you and your advertising rates.

You will need to enter the 'franchisee area' at the central website with the supplied username and password. Once you have logged in you can edit your web pages with your own details.

When you enter the 'Edit my website' you will see some variable data boxes which once completed and saved will immediately go live onto the world wide web. You can change this variable data as often as necessary. It is important to enter the areas, where and how many you distribute to in Step 2 of the "How to place an order in Look Local" webpage. (See below).

Look Local - Windows Internet Explorer

http://www.looklocal.com/solihull/page-advertisewithus.asp

look local Solihull & Warwickshire  
Tel: 01926 484181

Home Advertise With Us Leaflet Distribution Terms & Conditions Contact Us

Look Local: Delivering local business listings to thousands of homes and businesses every month

### How to Place an Advert in Look Local

**COPY DEADLINE - 20TH OF THE MONTH FOR THE FOLLOWING MONTHS ISSUE**

#### Step 1

Choose your advertisement size:

- Full page (195mm x 133mm). From - £48.00 + vat
- Half page (95mm x 133mm). From - £28.00 + vat
- Quarter page (95mm x 63mm). From - £16.00 + vat

#### Step 2

Decide which edition(s) you wish to advertise in and for how long. You will get a discount if you place your advert in more than one edition in the same month. We also offer discounts for 3 and 12 month periods, please ask for details. Here are the editions that we publish every month:

1. KNOWLE - **Distribution 4,200**
2. DORRIDGE, LAPWORTH & HOCKLEY HEATH - **Distribution 4,200**
3. MONKSPATH & HILLFIELD - **Distribution 4,200**
4. BALSALL COMMON, MERIDEN, HAMPTON IN ARDEN - **Distribution 4,200**
5. HENLEY IN ARDEN, CLAVERDON, HAMPTON MAGNA, HAMPTON ON THE HILL, HATTON & HATTON PARK

### 1.2.2 Pricing Structure on your website

When showing your potential customers how much your rates are, you should put your lowest achievable rate i.e. if a full page is £70.00 for one month and

£60.00 per month on a 12 month agreement then show the £60.00 rate as the website states that the price is 'From' £60.00 for a full page.

### **1.2.3 Franchisee area**

On the Look Local website you will find access to the franchisee area. This area is password protected and you should not allow access to this area to anyone else. Within this area you will find, access to edit your website, manual updates, a link to the CRM (Customer Relationship Managent), a link to upload your artwork to the central printers, downloads, news, tutorials, tips and lots more.

You will be emailed with your login details to the franchisee area.

### **1.3 Company registration**

We suggest that you speak to an accountant regarding Company Registration as this decision is dependant on individual circumstances. We have an accountant who is familiar with Look Local and he can give you advice on this matter, his details are:

Chris Pate  
Trafalgers Accountancy Practice  
256 Alcester Road South  
Kings Heath  
Birmingham  
B14 6DT

Tel: 0121 444 5309  
Fax: 0121 441 1141  
Email: [chris@trafalgers.com](mailto:chris@trafalgers.com)

### **1.4 VAT**

#### **1.4.1 What is VAT?**

Value Added Tax (VAT) is a tax businesses charge when they supply their goods and services in the United Kingdom (UK) or Isle of Man (IOM).

At Look Local we recommend that you become VAT registered immediately. Look Local Limited are VAT registered so all invoices that you receive from us and any other VAT registered suppliers will include VAT, if you become VAT registered you will be able to claim the VAT back, on your VAT returns.

#### **1.4.2 When must I register for VAT**

You **must** register for VAT when the value of your:

- (a) taxable supplies **or**
- (b) distance sales **or**
- (c) relevant acquisitions, go over the current registration thresholds
- (d) when you take over a VAT registered business as a going concern

Once you are registered or are required to be registered for VAT under any of the above categories, you are a taxable person. As a taxable person you must account for VAT on all your taxable supplies, distance sales, acquisitions and relevant supplies in the UK from the date that you are required to be registered.

### **1.4.3 VAT registration**

For details of how to register for VAT please contact the VAT Excise and Customs Duties Advice Line on 0845 010 9000, or visit their web-site at [www.hmrc.gov.uk](http://www.hmrc.gov.uk)

What are zero-rated supplies?

These are taxable supplies on which the current VAT rate is 0%. The printing of the Look Local falls into the zero-rated supplies category, therefore you will not pay vat for the printing of Look Local.

## **1.5 Insurance**

We would strongly recommend that you seek professional advice in relation to the insurance requirements of your business.

The key areas you will need to consider are as follows:

### **1.5.1 Employers Liability**

Employer's liability is a compulsory class of insurance providing cover in relation to an employer's legal liability for bodily injury, death or disease arising out of their employment. The recommended minimum limit of indemnity is £10,000,000 any one claim.

### **1.5.2 Public Liability**

Public liability provides cover in relation to any legal liability incurred as a result of loss or damage to a third party's property or injury to a third party person.

In addition you will need to consider arranging appropriate cover in relation to any business equipment, stock or buildings occupied by the business. If you do intend operating from home, then you should inform your household insurers accordingly.

Our Insurance Brokers are Oval Insurance Broking Limited they are fully aware of the Look Local operations and the contact details are:

**Oval Insurance Broking Limited  
Bhavin Patani  
5 Western Boulevard  
Leicester  
LE2 7EX**

**bhavin.patani@oval2.theovalgroup.com**  
**Direct Dial Tel: 0116 2644659**  
**Fax: 0116 247 0140**

They have a tailor made Insurance package for all Look Local franchisees. You will need to tell them the number of employees that you have and also the wage that your deliverers will get in total.

You can expect to pay in the region of about £265.00 per annum which includes a finance premium, payable over 10 months for Public Liability and Employees Liability insurance combined.

*The Premium can be paid by Cheque, Credit/Debit Card or by direct debit plan which requires a 10% deposit followed by 11 monthly instalments and does incur a interest charge currently at 5.2% but is subject to change.*

## **1.6 Hardware and software requirements**

You will need a Personal Computer with Internet access for the setting up and running of your Look Local franchise. The PC will need the following minimum specification:

### **1.6.1 Computer system requirements**

Windows® 2000, Windows XP or Windows Tablet PC Edition  
Pentium® II, 200 MHz or greater  
128 MB RAM (256 MB or more recommended)  
250 Mb hard disk space  
1024 x 768 resolution monitor  
CD-ROM drive  
Scanner  
Printer

MS Office

Most PCs now come with standard MS Office which will provide you with useful business applications such as Word, Excel and Outlook enabling you to perform standard functions; such as, letter writing and email. In addition to the standard MS Office suite of applications you can upgrade to MS Office 2003 professional which would suit a franchisee who intends to have more than one territory.

You will need to purchase a graphic design package compatible with our printer. We suggest CorelDRAW V14 (If you are more familiar with other software such as Adobe Illustrator, Quark, etc then you will be able to use this). As software compatibility is ever changing we have a complete and up to date list on the website. [www.looklocal.com](http://www.looklocal.com)

### **1.6.2 CorelDRAW® Graphics Suite 15 (X5)**

CorelDRAW® Graphics Suite X5 (or higher) is what we suggest if you do not already have graphic design software. This allows you to create and design the adverts required for your Look Local. We suggest CorelDRAW® Graphics Suite version 14 or higher because this is compatible with our central printers and is relatively user friendly. CorelDRAW® Graphics Suites may be purchased from various suppliers some of which can be found on our website.

CorelDRAW® Graphics Suite is a PC based programme that allows you to work in a variety of formats thereby avoiding some common problems associated with the provision of PC generated artwork to commercial printers. Commercial printers often use Apple Mac® computers rather than PC's.

Furthermore, CorelDRAW® Graphics Suite 14 will allow you to open a wide selection of file types (PDF version 5 or lower, Microsoft® Office, Adobe® Photoshop®, EPS, HPGL and AutoCAD®) that your customers may send to you.

You will need to spend some time getting to grips with CorelDRAW® Graphics Suite X5 but be re-assured that this is one of the easiest design programmes to use and tutorials are readily available from Corel. For further information please refer to the CorelDRAW® Graphics Suite 14 website: <http://www.corel.com>

Remember, you will not need to know everything that CorelDRAW® Graphics Suite X5 can do merely some basic relevant functions.

If you would prefer to use a software package that you are already familiar with then please confirm with us that your software is compatible with our central printers.

### **1.6.3 Internet**

Access to the internet is vital for the smooth operation of your business. We recommend setting up a web email address with broadband access. This will allow you to receive adverts and enquiries via email. Furthermore, you will be able to access the Look Local Home Page where you can download logos, forms, order stationery and view our FAQ's page and much more.

Access to the internet via a broadband connection can be set up through your current telephone supplier. Internet access via broadband is usually charged monthly. It is worth shopping around for suppliers as the monthly fee can vary and it is worth remembering that most suppliers require that you sign up for a minimum 12 month agreement.

#### **1.6.4 Email**

As a Look Local franchisee you will be given a unique email address, this will be your area followed by @looklocal.com for example: solihull@looklocal.com. You will be sent an email by our I.T department giving you instructions on how to configure your existing email account so you can receive your new Look Local email address. If you would like help configuring your email, you can email back the I.T department asking them to call you, please give them a variety of times that suit you.

#### **1.6.5 Banking**

You will need to open a business account with a bank. Look Local suggests opening a bank account with the HSBC Bank as we are familiar with their online banking facility, which you will need to pay your delivery staff. Head office also use HSBC so payments between head office and your account will credit you account quicker.

We have a contact at the HSBC who is familiar with Look Local and will be pleased to help with the opening of your account and offer you any free banking that they have available at the time. The contact is Andy Peck and he can be contacted on telephone number 08455 844 912 or email [andypeck@hsbc.com](mailto:andypeck@hsbc.com)

When you have selected your preferred bank you should apply for 'online banking' as soon as possible as it can take a few weeks to get all the security formalities processed.

*You should also request:*

- A cheque book
- A paying-in book
- A monthly bank statement
- A company credit card

## **2 Workflow**

This section of the manual provides guidance on how to ensure the smooth operation of your Look Local franchise, as well as how to retain and gain more customers.

### **2.1 Sales your Inaugural edition**

#### **2.1.1 Generating customers**

Generating customers is something you will need to do for the life of the business. From day one you should be considering how to generate them and then as time goes on how to generate more and to keep them.

#### **2.1.2 Unique selling points (USP's)**

Before talking to potential customers (Targets) make sure that you know these Unique Selling Points (USP's). A USP is something that your competitor doesn't or can't offer, or that you do better.

- A distribution of 4,000 (due to higher printing costs, full colour, local business directories with similar advertising rates generally have a much smaller distribution).
- As Look Local is a more targeted local directory we have fewer businesses from each sector than larger regional directories making it more likely that the customer will get a response.
- Local people prefer to use local businesses. Larger regional publications & newspapers have businesses from the entire region thus making it more difficult for the customer to identify the plumber for example in their area, Look Local as the name suggest a truly local directory
- Because of the handy size, people will tend to keep it by the phone or in the kitchen cupboard where a newspaper is larger and less user friendly
- There is no editorial in Look Local therefore it has a higher retention value than a newspaper or other publications whose main function (news) becomes out of date once read.
- As the distribution is localised the customer will get work from that area without having to travel miles to quote for potential time wasters or to areas that they would rather not advertise.
- Delivered by our own delivery staff giving us greater control over when Look Local is distributed and making us accountable for the delivery.

- Deliveries are checked on a regular basis and the rounds are even self checking as most if not all of the delivery rounds have at least one Look Local customer living on it. If a particular round had a problem we would know very quickly.

### **2.1.3 Business sectors**

Our experience has shown that a number of sectors do particularly well by advertising in Look Local. You should target potential customers from these sectors in your franchise area:

- Aerial & TV engineers
- Beauticians
- Builders
- Car Valets
- Carpenters
- Carpet Cleaners
- Carpet Fitters
- Carpet Shops
- Curtain Makers
- Drainage Engineers
- Electricians
- Gardeners
- Hairdressers
- Interior Designers
- Landscapers
- Mobile Car Mechanics
- Paint & Decorators
- Plasterers
- Plumbers
- Restaurants
- Roofers
- Wood & Laminate Flooring Shops
- Window & Conservatory Suppliers

#### **2.1.4 Telephone introduction**

Using Webchise call from your target list and introduce your service, explain that you are about to launch a new form of local advertising and could you send them some information. Most, at this point, will say yes as they aren't committing to anything at the moment.

At this stage they may ask further questions about Look Local so make the most of this opportunity and show your enthusiasm and give them as much information as possible. Tell them about any special offers that you have running for the launch edition, the area of delivery and distribution.

Whether they ask questions or not you must try to get as much information from them so you can. Complete as many fields in the CRM as you can. You may find that you only have the business name and telephone number so you must get the address and the name of the person who makes the decisions on advertising.

Once you have gained this information you can start to send out the launch letter, Rates Card' and 'Sample Look Local'. You will need to telephone all of the customers that you send the Launch Letter to, 3 days after posting it.

On average it will take about 3 minutes for each customer on the telephone. So if you only have an hour to spare 3 days after sending out the launch letter then only send out 20 letters. You can stagger the amount of letters that you send out each day over a week so you are not on the phone all day. 40 phone calls a day for 5 consecutive days will bring in some good results.

#### **2.1.5 The first phone call**

A typical conversation with a potential customer who we have not spoken to before would go something like this:

*"Hello, my name is Matt Shaw from a company called Look Local, I would like to send you some information on a new business directory I am about to launch in Knowle, who should I send it for the attention of?  
Wait for reply.....  
and what is the best address to send?  
Wait for reply....."*

At this stage the conversation can take on a number of courses but you really need to 'capture the data' for this customer i.e. all contact details such as mobile number, post code etc.

#### **2.1.6 Follow up call**

Three days after sending out the information to the prospect you will need to call them. Here is an example of what to say in the follow up call;

Hello, this is Matt Shaw from Look Local; I have recently sent you some information about advertising in Look Local. I am calling to see if it is of interest to you.

### **2.1.7 Negative objections:**

- a. Yes, I did receive it but I already advertise in the yellow pages/newspaper.
- b. Sorry mate, up a roof, can't speak now.
- c. My kids probably threw it in the bin.
- d. Never advertise, I think it is a waste of money.
- e. I'm trying to cut down on my expenses, not increase them!
- f. No!

### **2.1.8 Overcome the objections:**

- a. Lots of our advertisers either do or have advertised in the yellow pages/papers but the main feed back that we get is that with the Yellow Pages you may find yourself travelling away from your local area to quote for say a leaking tap and then not getting the business. What our customers find is that because Look Local is targeted to the local area, you will find that jobs will come from your local area, cutting down on travelling time between jobs and even if you still get the occasionally 'leaky tap job' you haven't travelled half way across town.
- b. When is it best to call you back
- c. Do you do any local advertising? Can I send it again for your attention? Can I email you some info? What is your name?.....resend. If they are asking for it to be resent then this is a strong buying signal
- d. Where do you get your business from if you don't advertise? (the likely response is 'word of mouth') We have many customers that we speak to that only use Look Local as a way of displaying their contact details. In other words you have a good reputation but how do they contact you, the Look Local isn't only to get new business it is a reference for your existing customers and their recommended friends to get your details from. For £25.00 per month we can get your contact details delivered to 4,000 houses locally.
- e. Look Local can help reduce your travelling cost between customers and between quoting. It will keep you work local within a 4/5 mile radius, no more travelling miles to quote for the small jobs, and then not getting them. You will pay more in fuel to go across town than it would to place a small advert with us. (very much the same response to objection a.)

- f. Do you advertise anywhere at the moment? Why wouldn't advertising interest you? (when we get the response and the reason you may find that one of the above responses will help)

### **2.1.9 Personal introduction**

Equipped with your Launch Letter (LL0705), Rates Card (LLRC0705) and sample Look Local visit your local shops and businesses. If you are able to talk to the owners/managers there and then you should take this opportunity. Find out who the decision maker is. If they are busy leave them a sample Look Local along with the Launch Letter and Rates Card. Do then revisit them at a more convenient time. If the decision maker isn't available take a note of their name and ask for a business card or compliment slip. You can then add this information to your target list.

### **2.1.10 'Don't sell, tell'**

When using the telephone introduction or the personal introduction don't put pressure on yourself by thinking that you must go and sell to the prospect by the time you have finished talking to them. It would be better to approach the prospect with the view of telling them what you are going to do in launching Look Local.

I have seen some people pacing up and down the High Street or hovering over the telephone in fear of having to 'Sell' the advert, take the pressure off and tell them what you are doing to do. You will feel more at ease and they will feel more comfortable with you.

### **2.1.11 Mail shots**

Utilising your customer database send a regular mail shot to potential customers. Try to limit your mail shots to the number of clients you can reasonably telephone in 2 to 3 days time. As a guide, if you are able to set aside one hour in 3 days time to make your calls, then send out approximately 40 letters. Remember to call customers again if they were not available first time.

Once you have sent out the first batch of Launch Letters you will need to call the customer back 3 working days later. During this telephone conversation you need to reintroduce yourself asking if they would be interested in placing an advert in Look Local. Don't expect everyone to say yes, however if you have followed the procedure above you will start to get some good results, be sure to know all the 'Unique Selling Points' (*USP's*) and be enthusiastic and show the belief in your product, if they haven't received it, or are too busy, then make a note to call them back.

## **2.2 Subsequent editions**

### **2.2.1 Repeat adverts**

Each month prior to your printing deadline you will need to contact those advertisers from the previous month to see if they would like to repeat their advert.

### **2.2.2 Monthly emails**

Send an email to your customer from the 'Webchise System' asking if they would like to re-run their advert. Send the email to your entire database 7 days before the deadline date; this will give those customers who only check their email at weekends the opportunity to see the email. The deadline email is on the Webchise system.

### **2.2.3 Monthly calls**

Any customers who haven't replied to your deadline email and those customers who haven't got an email will need a phone call to see if they do want to advertise. You can create a report of all customers who advertised in the previous month from within the Webchise system. Set reminders for any customers who you need to call back.

You should try and establish a rapport with your clients when you call them as it will be easier to call them each month if they remember you. You should avoid asking them immediately if they want to place an advertisement. You should be courteous and enquire if they are busy and how the advertising has worked for them.

You should be mindful that your client may be busy, or with a customer, so try and keep the call brief or call back later at a more convenient time.

## **2.2.4 Monthly Sales Cycle**

As we work to a deadline each month we should plan what our activity should be during and week of that monthly cycle. The following is a simplified plan of what we should be focused on each week of the cycle.

### **a. Week One**

Contact newbie's (*Those customers who have advertised for the first time in the latest edition*) to let them know all books have been delivered. Send letter to newbie's, with letter explaining the benefits of a series of adverts and 3/12 month agreements. Get details of new advertisers in competition material and add to database. Send mailshot to prospects.

### **b. Week Two**

Follow up mailshot sent to prospects.

### **c. Week Three**

Call all that missed previous month and any that requested a call for coming deadline.

### **d. Week Four**

7 days before deadline day – send deadline email

Call all that advertised in previous month that haven't booked yet

1 day before deadline – Send Deadline Text (if you have this facility, ask head office for details)

Deadline day – Last chance email

### **2.2.5 Advert amendments**

Customers may at this stage want to amend their advert, use amendment form (AF1/0705) to take a note of the amendment; this will be used when you are ready to amend the advert, be sure to send the customer a proof of the amendments. Only put the advert into your Look Local once the customer has proofed the advert by email so you can refer them back to this if there is a problem once you have printed the Look Local.

If a client is becoming a regular advertiser and they are happy with the response that they are receiving from advertising in your Look Local, remind them of the benefits of a 3 or 12 month agreement.

Refer to the 'Contracts and Pricing' chapter for more information on the benefits of 3 or 12 month agreements.

The more customers who are on a 3 or 12 month agreement the fewer calls you will have to make each month and their business is guaranteed for the term of the contract.

### **2.2.6 Taking orders**

When you receive an order from a business make sure you fill in as much information as you can when taking the order as this information will go towards developing your CRM and give you information that you will need later. Emails and mobile phone numbers are sometimes neglected but these are probably the most important information in the order process

It is important at this stage that you explain to your new customer what the order process is. Tell them that they need to send you the advert by email, fax or post and you will then create the advert and send them back a proof. Once they are happy with the advert and you have received confirmation of the final proof their payment is then due.

It is vital to tell them this so they are aware that you require payment on final proofing. This will bring money into the business from the first month and save any awkward conversations later on when it comes to asking for. At this time you can also make them aware of how payment can be made. The best way will be for the customer to pay online using the secure link from within the proof email. (the proof email is a standard email within Webchise)

### **2.2.7 Forms**

As part of your franchise pack you have been supplied with the following forms that you will need to use in the operation of your Look Local franchise. Sample adverts are also included on the CD Rom that you have been given. All the

forms can be found and downloaded from the franchisee area on the Look Local website.

### **2.2.8 Administration forms**

Order Form - OF1/0705  
Amendment Form - AF1/0705  
Terms & Conditions - TC1/0705  
12 Month Contract - 12Cont/0705  
12 Month Contract Copy - 12ContCopy/0705  
Customer Approval - CA1/0705  
Fax Header - FH01/0705  
Rates Card - LLRC/0705  
Launch Letter – LL

#### **Delivery forms**

Child Terms & Conditions - DTCC/0705  
Adult Terms & Conditions - DTCA/0705  
Child Risk Assessment - CRA/0705  
Adult Risk Assessment - ARA/0705  
Child Handbook - CHB/0705  
Adult Handbook - AHB/0705  
Deliverer Welcome Letter Adult - DWLA/0705  
Deliverer Welcome Letter Child - DWLC/0705  
Permit Issue Letter - PIL/0705  
  
Delivery Payments Table – DPT/0705

#### **Adverts**

Half Page Filler Advert  
Half Page Filler Advert 2  
  
Deliverers Required half page advert  
Deliverers Required Quarter page advert  
  
Half page Flyers advert  
Full page Flyers advert

## **3 Centralised Printing**

All Look Local franchisees use our centralised printer. They have experience in printing and dealing with the specific requirements of Look Local.

### **3.1 Pagination**

Once you have reached your deadline for accepting orders, all artwork has been completed and proofed you are ready to construct the Page Layout.

Once the printer has received your completed artwork it will take 8 working days to be delivered your Look Local back to you. (See section Co-ordinating print with the printer and their requirements.) We recommend a deadline of the 20<sup>th</sup> of each month. If the 20<sup>th</sup> falls on a week-end or bank holiday you should use the working day prior to the 20<sup>th</sup>.

Please remember to adjust your schedule to account for editions affected by Weekends/Christmas/New Year/Bank Holidays. All of the printers' deadlines and delivery dates are available on the franchisee area so adjust your deadline to your advertisers accordingly.

Make a 'size slip' for each advert and write the customer on each slip. Add a further full page slip for Local Events and a full page for the 'Advertising Rates Advert'. On your first month add a full page for your welcome note.

Place all the full page slips, half page slips and quarter page slips in 3 separate piles. Webchise will be able to tell you how many adverts and how many pages the adverts will take up.

You may need to insert fillers in your Look Local to make the number of pages up to a printable quantity without any blank spaces. The structure of the Look Local requires the number of pages to be:

- 28 pages
- 32 pages
- 36 pages
- 40 pages
- 44 pages
- 48 pages

And so on increasing by 4 pages each time.

If you find that you have, for example, 33 pages you would need to insert 3 pages of fillers as you will always need to go up to the next size. Look Local recommend that you always have your local events page (Full Page) towards the rear of the

book and the rates page (Full,  $\frac{1}{2}$  or  $\frac{1}{4}$ ) on the inside front cover. You can then choose which of the standard fillers you wish to insert to make up the next book size.

If you have a full page of rates on page 2 and you find that you are going into another 4 pages just for the sake of a  $\frac{1}{2}$  page then reduce the size of your rates page to  $\frac{1}{2}$  page to accommodate the left over  $\frac{1}{2}$  page.

You are now ready to make up a sample book. Divide the total number of pages by 4. This is how many sheets of paper you will need to make up the sample book. I.E. 40 pages divided by 4 = 10 sheets of paper.

Take your 10 sheets of A4 paper and fold them in half to make a 40 page blank book.

Using the 'size slips' and 'Bluetak' place the adverts that you have already agreed will be on the front page, back page and page three; as well as any special requests by customers, such as middle or early right hand pages.

Once you are past your first edition of Look Local then make sure you rotate those customers who were nearer the front of the book last month to the rear this month, and those who were at the rear, to the front. This will keep your Look Local nice and fresh and reassure your customers that you are using a fair system to rotate everyone around.

You must remember to comply with advert location commitments made to customers that have signed a 12 month contract. You can now start to fill up the rest of the book; making sure not to put the same business sector advertisers on the same page or on opposite pages. If you wish to change anything around once you have stuck all the adverts in, then you can easily move them around until you are happy.

Try to place a Local Events page in a similar position each month so readers can get used to where to find it

Once you are happy with the page layout you can begin transferring this to the computer using the 'Please mention', 'support your local business' and 'to advertise' Page Templates' the 'Front Cover Template' the 'Inside Page Template' and the 'Local Events Page Template'. You need to make sure all your adverts are inside the guidelines. When you have imported all the adverts to the template, save the page as the page number i.e. the front cover is 'Page 1', the 'The Inside Front Cover' is 'page 2' and so on.

## 3.2 Coordinating with the printer and their requirements

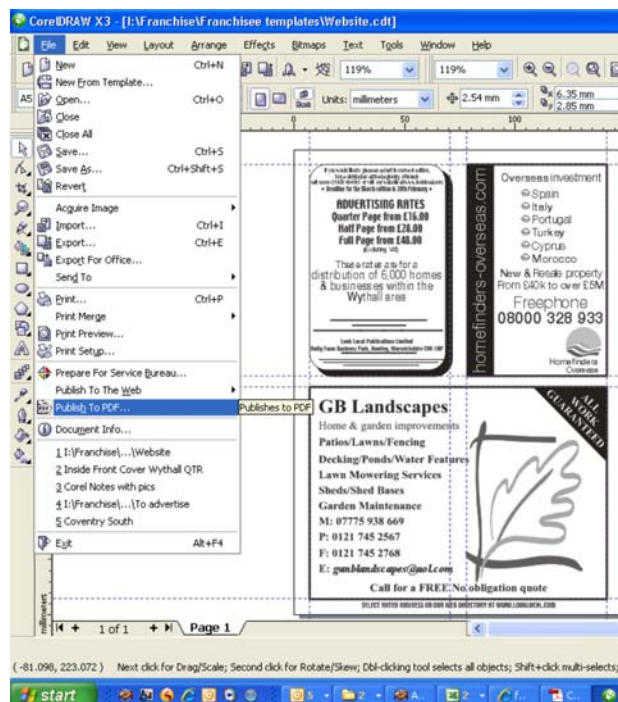
### 3.2.1 Converting Fonts

You will need to supply the printer with a 'Portable Document File' (PDF) of your artwork. Each of your pages will need to have the fonts 'converted to curves' (if using CorelDraw) in other applications the converting of fonts may be called something else such as outlines. If you don't do this and the printer doesn't have a particular font that you have used then the advert will be printed incorrectly. The printer cannot be held responsible if this happens. If you are using an application other than CorelDraw and you need help converting the fonts please ask and we will help. When you turn a CorelDraw file into a PDF there is a way of making sure that all fonts are converted to curves, as below.

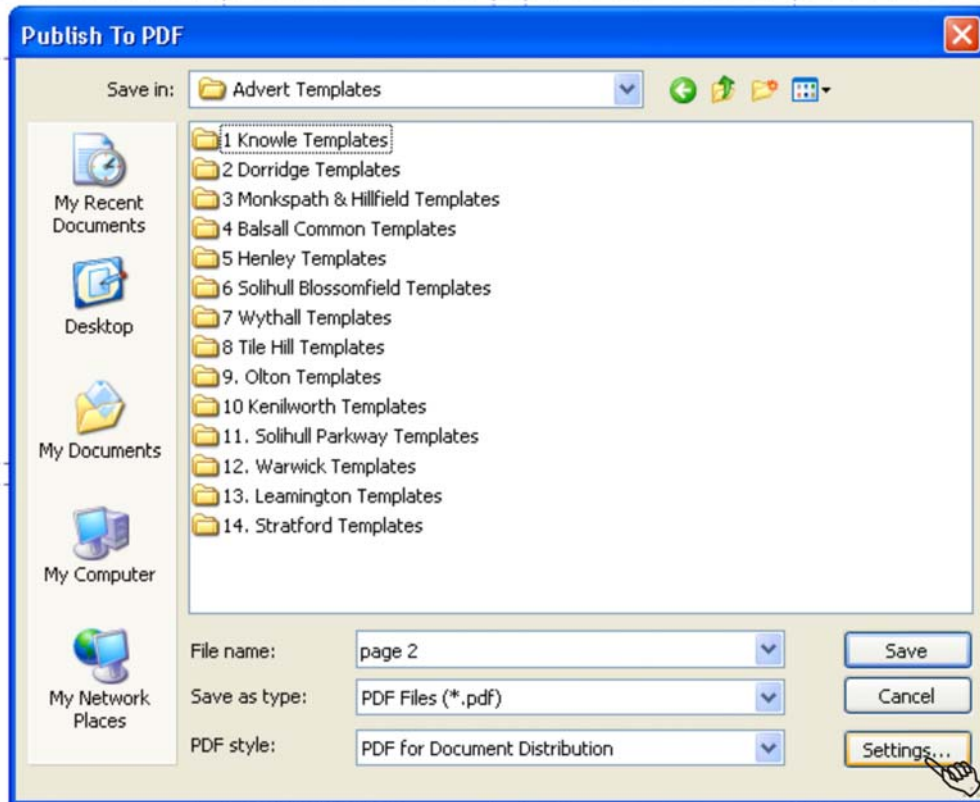
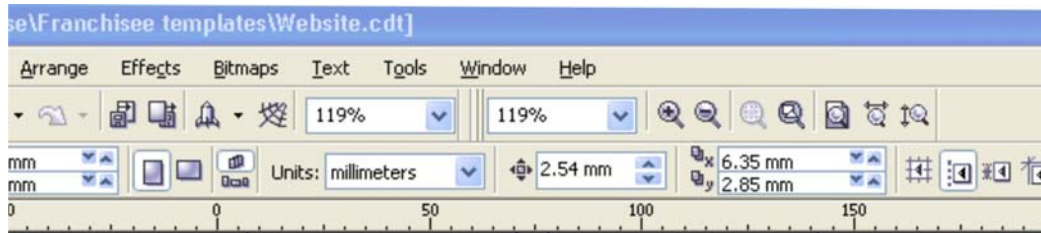
### 3.2.2 Supplying a PDF when using CorelDraw

When you have imported all the adverts for that page into the template you will need to 'Publish the File to PDF'. This will prepare the file ready for the printer.

To 'Publish the File to PDF' go to > **FILE** > **Publish to PDF**.



From the window that now appears select the folder in which you wish to save the file in (*Advert Templates in this example*) then click on the **settings** button.



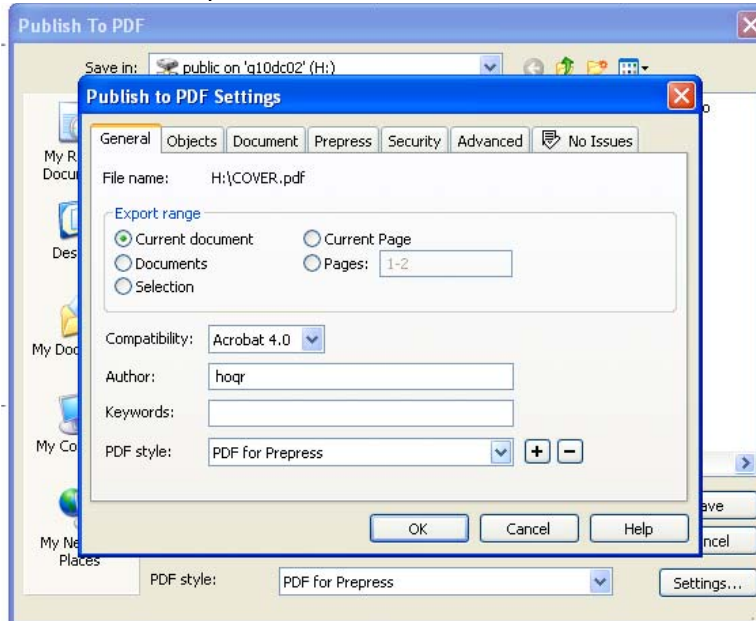
E: [ganblandscapes@aol.com](mailto:ganblandscapes@aol.com)  
Call for a FREE, No obligation quote  
SELECT RATED BUSINESS ON OUR WEB DIRECTORY AT [WWW.LOCALONLINE.COM](http://WWW.LOCALONLINE.COM)

Page 1

ag/Scale; Second click for Rotate/Skew; Dbl-clicking tool selects all objects; Shift+click multi-selects; Alt+click digs

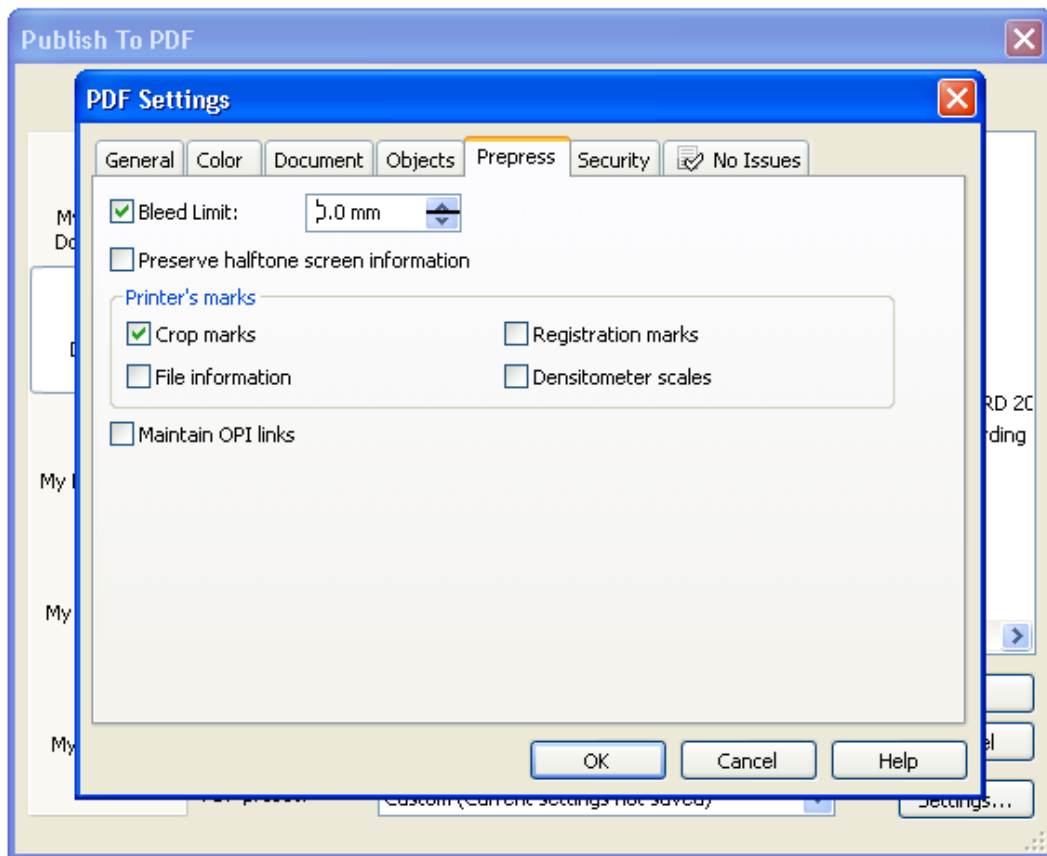


From the next window that appears go to the 'General' tab and select **current document** from the **export range**. Go to 'PDF Style' and from the drop down menu select 'PDF for Prepress'

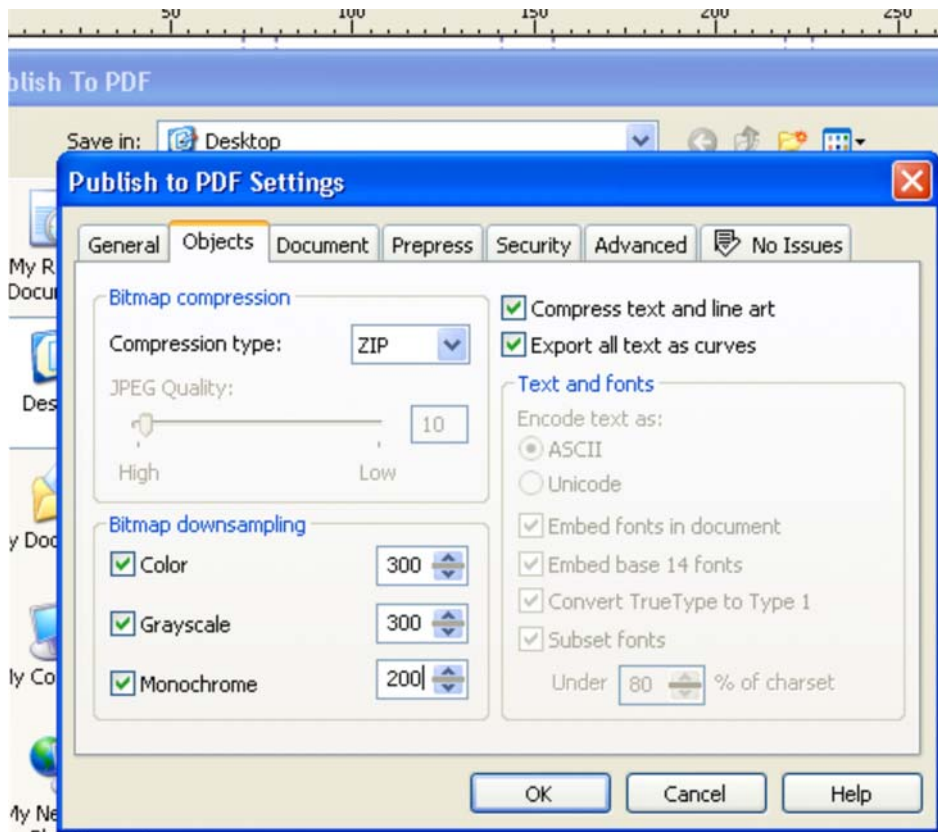


## Go to 'Prepress' Tab

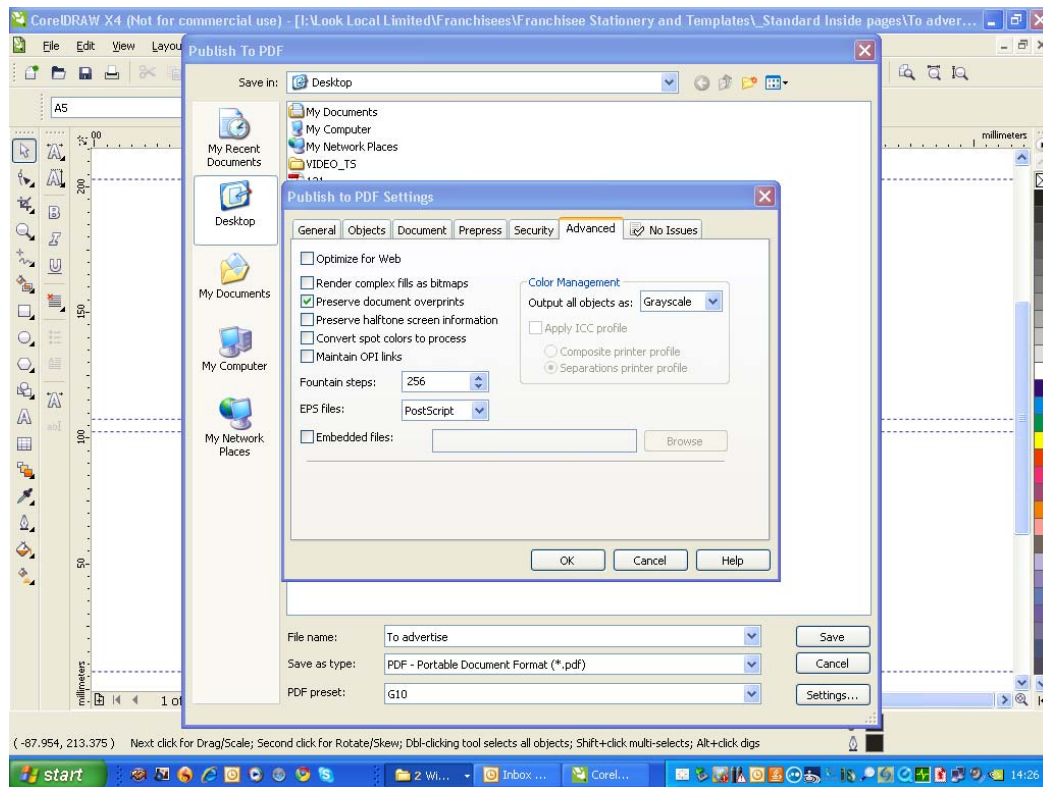
1. Change the bleed to 0.0 mm.
2. Check the **Crop Marks** Box



Click the **object** tab and ensure 'Compression Type' is set to ZIP. In **bitmap downsampling** select: **colour 300**, **grayscale 300** and **monochrome 1200**. **TICK** the box **Export all text as curves**. **THIS IS VERY IMPORTANT**.



Go to 'Advanced Tab' and on the 'Output all objects' menu select 'Grayscale'  
Make sure that 'Convert spot colors to process' is not checked.



### 3.2.3 Saving PDF Settings

Saving the settings will mean that you will not have to do this every time.

Click the **General tab** again and then click the “+” sign towards the bottom right hand corner. This will enable you to save these new settings for future use.

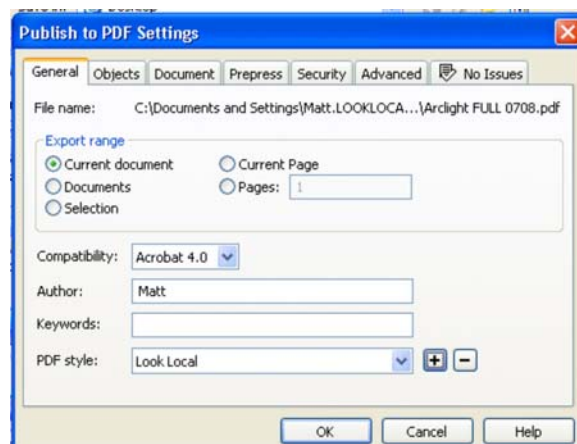
In the small window that opens, once the “+” sign has been clicked, type a name for the settings i.e. Look Local PDF, then click OK. This will save the settings under this heading and they will be available in the pull down menu, adjacent to PDF Style, for future use. Click OK, OK again and then click save. The PDF will be created and saved where you specified earlier.

### 3.2.4 Re-using saved PDF settings

To re-use these saved settings they can be accessed from the initial window that pops up when Publish to PDF is selected from Corel Draw. The settings are stored under the drop down menu adjacent to PDF Style in the bottom of this window. Click on the pull down menu and select “Look Local PDF” (or whatever name you called your settings!)

Once the correct settings have been selected, ensure you are saving the file to the correct location, then click Save.

**NB:** Corel Draw ‘should’ retain the last ‘PDF Style’ settings, used so this process may not be necessary every time.



### **3.2.5 Uploading your artwork to the printer**

The PDF's are now ready to go to the printers; you simply upload the artwork directly onto the printer's website ready for them to print. This site is called a File Transfer Protocol or more commonly know as an FTP Site.

You will need to upload your completed artwork by 5pm on the published print deadline date, to be found in the franchisees' area of the Look Local website.

To upload your finished artwork to the FTP Site you need to follow the link '*Upload Artwork*' on the franchisee area of looklocal.com or type this in your web address bar <http://87.194.171.161/>

You will then be asked for a **username** and password both of which are case sensitive.

You are now into the FTP site. You can now copy and paste each of your pages in turn into your relevant folder on the FTP Site.

### **3.2.6 Confirming your print order**

Once this is completed you should send an email to look.local@amra.co.uk confirming that the artwork for you area is now complete, how many Look Locals you require how many pages there are and that the artwork is ready to print.

The printer cannot be held responsible for any of your errors that they print. It is extremely important that you only send the completed artwork when you are happy that everything is ready to go to print. The completed Look Locals will be sent back to you 8 working days after the print deadline.

Details of the cost of printing, artwork deadlines and the dates you will receive the Look Locals back from the printers is available on the franchisee area of our website. Further details can also be obtained from the Look Local Head Office upon request.

Should you face any problems with the ftp address please contact:

Emma Seary: 01992 453904

Email : [eseary@crystalcp.net](mailto:eseary@crystalcp.net)>

Any print related enquiries should in the first instance be directed to the Look Local Franchise head office who will be able to deal with your print query.

## **4 Delivery of Look Local**

Look Local will need to be delivered to your delivery area during the first week of each month. You will need to have your Look Locals delivered to your deliverers in time for the first weekend of the month and then the deliverer gets until the next Wednesday to have their delivery round completed. All deliverers are self employed.

### **4.1 Organising the delivery of Look Local**

Prior to your first edition place an advert in local newsagents, on community information boards, in petrol stations, youth clubs, etc for teenagers or adults to deliver your Look Local.

We recommend that you divide your distribution area up into manageable delivery rounds; we suggest no more than 400 Look Locals in each round. Adults may consider taking on more than one round but school children would be advised to take one round of 400.

Make a record of the delivery rounds and assign a reference number to them i.e. In the Knowle area we have a delivery rounds which have a code K01, K02, K03 etc. This will enable you to keep track of delivery areas. Use the 'Master Delivery Sheet' to enter all the details of each round and who will be delivering it.

All deliverers are self employed however you still need to get the following forms completed by each deliverer.

### **4.2 Child deliverers**

The Children and Young Persons Act provides specific legal stipulations concerning the employment of child workers. The Health and Safety at Work Act statutory requirements will also need to be followed. For child workers, defined as anyone of compulsory school age and usually over 13 years of age must be registered with the local authority. You must contact your local council and ask to speak to the Education Welfare Officer, who will send you medical declaration and parental consent permit forms and any other information they require you to provide to child workers, they will also confirm what age you can employ a child from. You must conduct risk assessments and retain these along with other permits outlined above. For additional information on your legal duties and responsibilities visit the Health and Safety section of the Business Link website: [www.businesslink.gov.uk](http://www.businesslink.gov.uk)

Make sure that you send all of your child workers the Local Authority forms and following Look Local forms:

- a) Child Risk Assessment Form (CRA/0705)

- b) Child Terms and Conditions of Delivery (DTCC/0705)
- c) Child Deliverers Handbook (CHB/0705).

You can download a copy of all these forms from our website along with the Childs Deliverer Welcome Letter (DWLC/0705) to be sent to the deliverer. The risk assessment is a standard form that we have generated as a guide, if you feel that your local area has additional risks then you need to add them to the form.

### **4.3 Adult deliverers**

Adult deliverers will need the following forms.

- a) Adult Deliverer Welcome Letter (ADWL/0705).
- b) Adult Risk Assessment (ARA/0705),
- c) Adult Terms and Conditions of Delivery (DTCA/0705)
- d) Adult Deliverers Handbook (AHB/0705);

### **4.4 Delivery Payments**

#### **4.4.1 Pay structure**

We suggest the following rates of pay for your deliverers:

- £0.03 per Look Local
- £0.01 per flyer

You may decide to pay extra for some rounds that have particularly long drives on them. We call this a long drive bonus and pay an extra £0.01 per house on the whole round.

#### **4.4.2 Paying your deliverers**

You will need to ensure that your online banking service has been activated before you will be able to pay your delivery staff online.

Using the 'Delivery Payment Table' on the franchisee area enter the amount of Look Locals delivered by each deliverer in the relevant column. Enter the amount of flyers delivered to each house by the deliver in the appropriate section. The end column will automatically give you the payment due to that deliverer. The table will cross check payments, make sure that the bottom two totals match.

You will need to enter the relevant bank details of each deliverer onto your online banking system. You are now ready to pay your delivery staff online. A benefit of utilising online banking is that once you have set up deliverers' details they will be saved in the banking system and will not need to be re-entered again. To

make further payments you only need to enter the amount to be paid and the date of payment.

## **5 Contracts and pricing**

### **5.1.1 Twelve month contracts**

The contract is between Look Local and your customer. Make sure that the customer signs the agreement and the direct debit form. Decide how much discount to allow your customers; we suggest between 5% & 10%.

The customers direct debit will be taken on the 11<sup>th</sup> of each month in advance of the advert insertion, this will allow head office to notify you if the payment does not go through. On the first month the direct debit forms must be received by head office prior to the 5<sup>th</sup> of the month. If the forms are received after this date then the first payment will need to be by credit/debit card/cheque or cash.

When the customer has signed their 12 month contact form make sure that you give them a copy, along with a copy of your standard Terms & Conditions and send their completed direct debit form to head office.

The 12 month contract is structured on a rolling basis with a minimum 12 month commitment. Contract customers are required to provide 1 months written notification to terminate the contract once the initial 12 month period is completed. Unless cancelled in writing contracts will be renewed automatically.

### **5.1.2 Benefits to customers on 12 month contracts:**

They will receive a preferential discounted monthly rate for the full term of the contract.

They will benefit from a half / quarter page advert on the front cover or full on page 3 or back cover of at least twice in their 12 month contract period.

They are guaranteed inclusion in the guide every month during the term of the contract.

You can find the twelve month contract and the Direct Debit form in the appendix and available to download on the franchisee area of looklocal.com

### **5.1.3 Pricing policy**

It is important to decide on your pricing policy before contacting any customers and once decided stick to it. As a guide the rates Look Local recommends, before discounts, that you don't go below are:

- ¼ Page      £25.00
- ½ Page      £40.00
- Full Page    £70.00

It may be worth considering the fact that the more you charge the more discounts you will be able to give to anyone on a 12 month contract.

It may be necessary to offer an introductory reduction as an incentive during your start-up phase. It is important that you migrate customers to the approved pricing structure as soon as possible to establish and maintain credibility. You risk losing credibility if customers learn that their competitors or fellow advertisers are receiving a different rate structure.

If customers do ask about special prices or try to knock you down, be honest with them and tell them that your advertising rates are already very low cost and not set artificially high in order to facilitate the negotiation of further discounts. You should take the opportunity to highlight the benefits of going on a 12 month contract.

## 6 Accounts

Head office will collect payments from the customer offering them a wide variety of efficient ways to pay.

### 6.1 How the customer makes payment

Once the artwork is ready to send to proof you will need to go into the CRM and send the proofing email to the customer. Attached to this email will be the advert (in PDF Format) and the invoice (in PDF Format). Once the customer is happy with the proof they can make payment by one of the following means:

- a) Online credit/debit card payment via link on proofing email
- b) By cheque sent to head office made payable to Look Local
- c) By BACS payment
  - i. Sort Code: 40-42-12
  - ii. Account Number: 81789503
  - iii. Customers must put the invoice number on the payment.
- d) By Direct Debit.
- e) By taking a credit/debit card payment verbally, entering the card details directly using the CRM. (Subject to PCI compliancy guidelines)

The customer can also pay you by cash or give you a cheque. These payments will need to be banked with the invoice number as a reference so head office can mark the invoice as paid. The customer can also give you their credit/debit card details (complete the credit/debit card form) which you can pass to head office, you need to destroy these details once they have been passed to head office.

Payment for adverts is due on proofing of the advert; a vat invoice will be attached to their proof. Once payment is received by head office you will be notified.

If you decide to provide credit terms for clients placing advertisements, you should use your discretion, and ensure that you obtain payment prior to agreeing any repeat advertising; if you do provide credit terms then this will be at the franchisees risk. We strongly recommend that you do not give any credit, it is industry that payment is due on proofing of artwork. Always make sure that clients have signed-off all artwork/proofs before you include the advert in Look Local.

## **6.2 Customer Payments Credit/Debit Card**

We gather and process information from our clients and it is our duty to protect it.

With regards to the Payment Card Industry Data Security Standard (PCI), Look Local Limited is annually assessed against this standard, to ensure we are compliant.

In order to maintain client security, the system to accept payment by credit card has been established via the use of the company Customer Relationship Management System (CRM), which enables the customer to link automatically through the use of the internet, to pay for services rendered, without the Franchisee being involved. A third party processes this payment information, which is also compliant.

However, it is recognised, that on occasion, the client will wish to pay the Franchisee by credit card, by other means, rather than using the direct link. Under these circumstances, the Franchisee must be aware that a risk of data misuse could apply and therefore precautions must be taken.

### **6.2.1 Accepting Card Payments by Telephone:**

Do not read the card details back to the client in the presence of any third party. Do not write down credit card numbers; it must always be loaded directly into the CRM.

### **6.2.2 Accepting Card Payments by Fax:**

As soon as a fax is received credit card details must be loaded into the CRM. The fax must then be destroyed, by shredding on site. Do not transmit any credit card details by fax. All correspondence is only available to company employees.

### **6.2.3 Accepting Card Payments by Email**

As soon as an e-mail arrives with credit card information on it, it must be entered into the CRM. Do not transmit any credit card information by e-mail. Printed e-mails must be destroyed immediately after entering the information into the CRM, by shredding on site. All information is available to company employees.

### **6.2.4 Accepting Card Payments by Letter:**

As soon as a letter arrives containing credit card information, it must be entered into the CRM. Do not transmit credit card details by letter. Once information

has been loaded into the CRM, letters must be destroyed immediately, on site, by shredding. All correspondence must only be accessible to company employees.

#### **6.2.5 Accepting Card Payments in Person:**

If a client hands you a credit card to pay for services, it must be loaded immediately into the CRM. Do not take photocopies.

#### **6.2.6 Transmitting Credit Card Data:**

Do not transmit credit card information in any format whatsoever. Do not include credit card details in any documents or spread sheets.

#### **6.2.7 Data Storage:**

Only employees of Look Local or their Franchisees can have access to any data that is being taken. Any paper correspondence must be destroyed on site by shredding, immediately after the information has been input. Information with client credit card details, must not be left unattended or in a non-secure area at any time.

#### **6.2.8 Office Equipment and Security:**

Routinely check your computer equipment for any unfamiliar attachments. Do not use un-authorized data storage tools (e.g. USB Memory Stick, CD ROM's, removable hardware devices)

#### **6.2.9 Franchisee CRM Accounts:**

All Franchisees have been assigned user names and passwords to access the company CRM. You must not divulge your password to anyone, or write it down.

### **6.3 Customer Payments by Direct Debit**

Look Local Limited are 'Direct Debit Originators' allowing us to collect money from your advertisers bank accounts.

To activate this form of payment you must get the customer to complete the Direct Debit Form which is downloadable from the Franchisee area of our website.

When you have received the completed form back from the customer you will need to forward this to head office. It will take 10-14 days to set up a new direct debit customer. It is the terms of the 'Direct Debit Guarantee' that we give the customer 10 days notice of the payment coming out of their account by way of an invoice. You will need to invoice the customer by the first of each month to allow head office to request the payment on the 11<sup>th</sup> of the month. This time schedule will allow head office to notify you of any returned direct debits before your print deadline.

If you sign a customer up on DD after the 1<sup>st</sup> day of the month you will just need to take another form of payment for the first instalment. When you send the DD Form to Head Office please include your franchise area on the reverse (i.e. Worcester North / Bromsgrove / Shirley etc).

If there are any changes in the amount that you are charging the customer between collections you will need to notify head office by 10<sup>th</sup> of the month.

You will need to mark the customer as a direct debit payer on the 'Webchise' System.

## **7 Customer Relationship Management (CRM)**

Customer relationship management (CRM) consists of the processes a company uses to track and organise its contacts with its current and prospective customers. CRM software is used to support these processes; information about customers and customer interactions can be entered, stored and accessed by you. Typical CRM goals are to improve services provided to customers, and to use customer contact information for targeted marketing.

### **7.1 Webchise**

Look Local use a CRM called Webchise. Webchise is a 'Customer Relationship Management' system (CRM) that will be at the heart of your business and the database of your franchise.

Your CRM will be an essential tool for your Look Local franchise and you should start developing this without delay. The database should be made up of businesses in your franchise territory, as well as businesses that may already be advertising in other competitors' publications, newspapers, internet sites, shop windows, on advertising boards at local sports grounds and from the livery on the side of company vehicles.

Be aware of any potential customers' location, if the potential customer is based in another Look Local franchisees territory permission must be sort from that franchisee before any approach is made, that franchisee may already be dealing with the business and would be able to share information with you.

Webchise is a web based CRM and the web address to access Webchise is <http://crm.looklocal.azclients.co.uk>

You will get a unique Username and Password which you should keep safe.

You will need to complete as much of form WCL found in the appendices section of this manual and then email the form back to head office. We will need this form completing prior to receiving your login details. Any information that you can't complete please send this information as you get it, such as your VAT number etc.

## **7.2 Webchise User manual**

### **7.2.1 Creating a New Company**

The 'Company Tab' is where all information is stored about each company that you have information about. This can be a prospect, customer or a supplier.

- Click on the 'Create Company' option on the left hand 'short cuts' menu
- Complete the Company record with as much detail as possible, it is vital for your future marketing that addresses, emails and mobile numbers are entered.
- Save the record

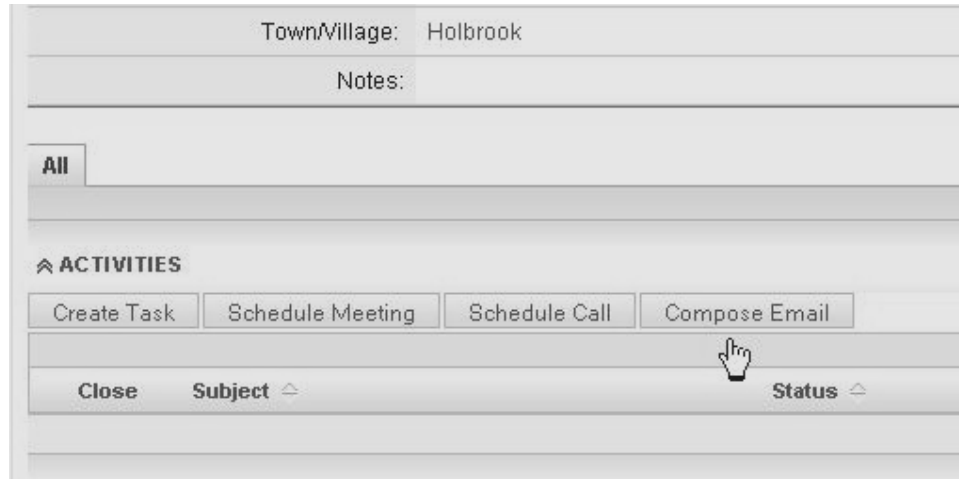
### **7.2.2 Creating a Contact within a Company**

Once you know who the contact is within the company you can add their details as follows

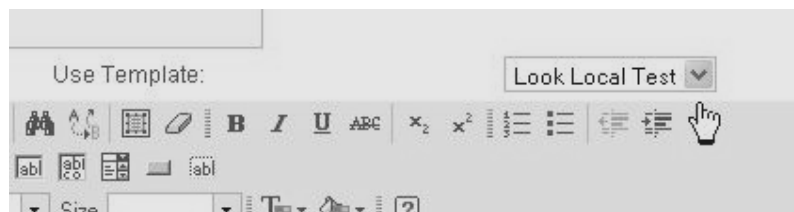
- Find the company record
- Click on the contacts section below the company details.
- Click create
- Enter the contact details in the full form.
- Click save

### 7.2.3 Sending the pricing template email

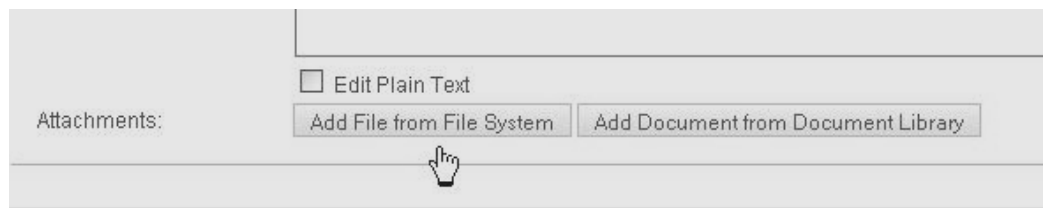
- From the Company record click 'Compose Email' in the 'Activities' section below the companies details.



Select the Pricing email Template



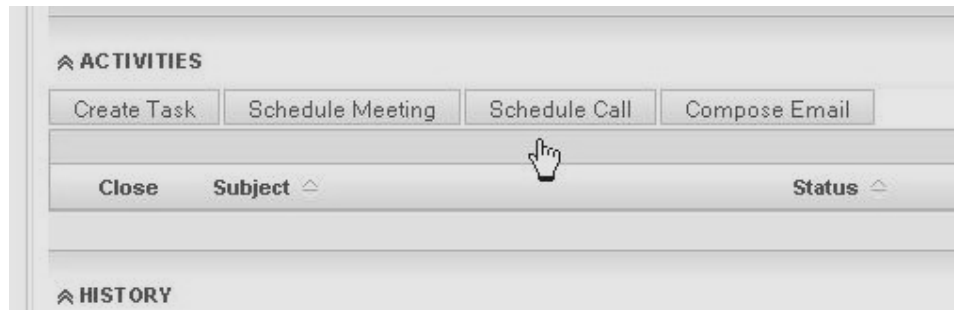
- Attach the appropriate pricing document



- Click Send.

## 7.2.4 Setting a Follow up Call

- From the Company record click 'Schedule Call' in the 'Activities' section below the Lead's details.



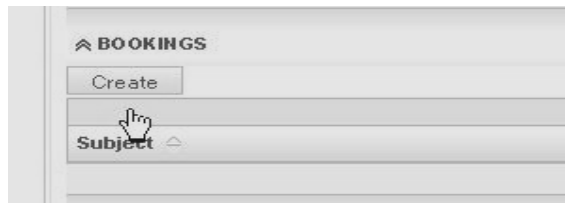
- Fill out the description of the call you want to make (e.g. "Follow up pricing sent to Joe")
- Set the date/time you want to call them
- Click Save

## 7.2.5 Creating a Booking

### What is a Booking?

Criteria - An advert which has been requested, but the artwork has not yet been approved and/or not yet paid for  
Info - Advert Dates, durations and Books

- Select the Company record.
- In their record, scroll down until you reach the 'Bookings' section and click 'Create'



- In the Booking Subject enter the **Month and Year** that the advert is due to appear ie **NOV09**
- Enter the advert start date, using the 'calendar pop up' which will be the **2<sup>nd</sup> day of the month** that they place the advert in.
- If a discount is going to be applied set the discount level.
- For each Area an advert is required, click 'Add Area' and then enter the name of the area.
- Then for each area click 'Add Advert' for each advert required and start typing the advert details:
  - Quarter Page
  - Half Page
  - Full Page
  - Double Page
- The options will be displayed (1 month, 3 month, 12 months, etc) – select the appropriate duration.
- When complete Save the Booking.

## 7.2.6 Create the Invoice

- Select the company from the companies tab and select the relevant booking from the subject list i.e OCT09.
- Click 'Convert to Invoice'

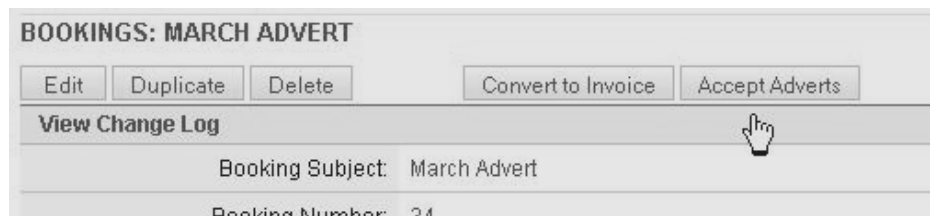


- The invoice details will be displayed. If you know how the customer is going to pay, set the "Payment Method". This is especially important if the customer is paying by Direct Debit or Credit Card.
- If the details are correct, click 'Post Invoice' and the invoice will be created
- Click on the "Download to PDF" to see the invoice and then print it, or you can save it to a specific folder ready to be emailed it to your customer.
- Email the 'Invoice' along with the 'Advert Proof' to the customer.

## 7.2.7 Creating an Order

Criteria - An advert which has been proofed and paid for and needs to be included in the book  
Info - Advert Dates, duration and area.

- When the invoice has been paid and the artwork accepted, you will need to “Accept the Advert”
- Select the Booking record
- Click ‘Accept Advert’ and the order records will be automatically created.
- This will have created an Order from the Booking



## 7.2.8 Banking Payments

Credit Card and Direct Debit payments will be handled by Head Office, so you do not need to do anything with these once the invoice has been raised.

## 7.2.9 Registering Cheque and Cash Payments

You do need to register that adverts paid for by cheque or cash have been paid into the bank.

- Select the “Finances” area within the Intranet
- Select “Invoicing” and then “Mass Payment”
- Click “View Invoices” to see all the outstanding invoices
- Select the Payment Method “Cash / Cheque”, select the Payment Stage “Banked” and then set the date that you paid the money into the bank
- Select the invoices that you paid into the bank and the amount will be totalled automatically and when correct, click the ‘Submit Payments’ button.

MASS PAYMENT

Start Date: January 18 2009  enabled  
End Date: January 18 2009  
Payment Method: Any

Payment Method: Cash / Cheque  
Payment Stage: Banked  
Transaction Date: January 18 2009

Mark As Paid?		Date	Number	Company	Description	Stage	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	18th Jan 2009	IPS2	Ipswich Fish Shop	March Advert	Posted	£458.85
<input checked="" type="checkbox"/>	<input type="checkbox"/>	18th Jan 2009	IPS3	Silverloop	March Advert	Posted	£69.00

Total Value: £527.85

## 7.2.10

## 7.2.11 Expense Payments

To record expense payments:

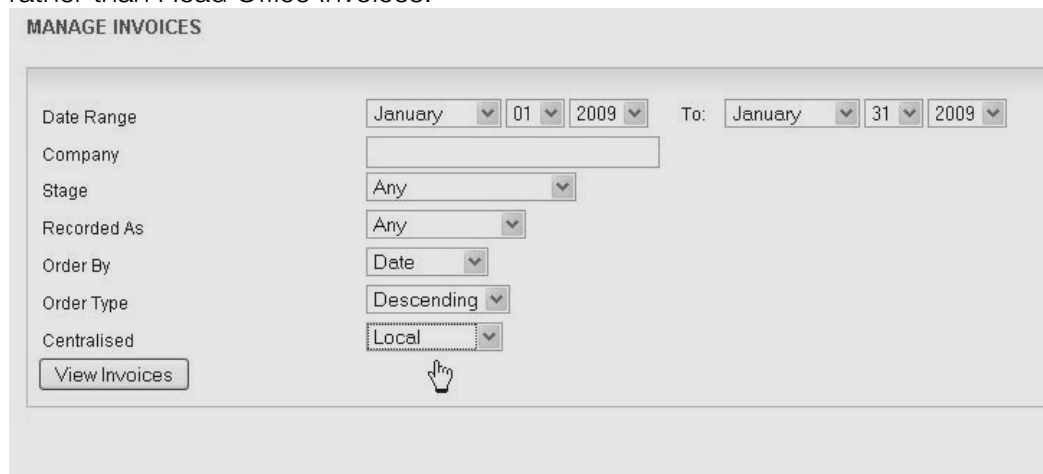
- Select the “Banking” area within the “Finances” area.
- Select “Add Payment”
- Enter the following information:
  - The Date of the Payment
  - A Description of the payment (e.g. petrol)
  - The correct expense category for the payment
  - The applicable VAT rate for the payment (if you have a VAT receipt select ‘Standard’. If you do not have a receipt select ‘Zero’.
  - The amount of the payment (including any VAT)
- Save the Details and the payment has been entered.

## 7.2.12 Marking Monthly Invoices as Paid

The invoices for the payments you will receive and the deductions to be paid to Head Office will be automatically generated.

When you receive payment you will need to mark them as Paid, to create the Bank Transactions.

- Select the “Invoices” area within the “Finances” area.
- Select “Manage Invoices”
- Set the ‘Centralised’ option to ‘Local’ so that it will display your invoices rather than Head Office Invoices:



The screenshot shows a web interface titled "MANAGE INVOICES". It contains several search filters on the left side, each with a corresponding dropdown menu or input field on the right. The filters are: "Date Range" (set to January 01, 2009 to January 31, 2009), "Company" (empty text box), "Stage" (set to Any), "Recorded As" (set to Any), "Order By" (set to Date), "Order Type" (set to Descending), and "Centralised" (set to Local). Below the filters is a "View Invoices" button. A mouse cursor is pointing at the "Local" dropdown menu.

- Click on “View Invoices” and a list of your invoices will be displayed.
- To pay an invoice, click on the edit icon

•



	Date	Number	Company	Description	Stage	Type	Value
<input type="checkbox"/>	18th Jan 2009		Look Local Ltd.	Franchise Deductions: 2009-01-01 to 2009-01-31	Posted	From Supplier	£257.62
<input type="checkbox"/>	18th Jan 2009	INV.1	Look Local Ltd.	Franchise Payment: 2009-01-01 to 2009-01-31	Paid (Unreconciled)	To Customer	£1,245.45

- Scroll to the bottom of the invoice and select 'Make Payment'
- Set the payment date to the date the invoice was paid, set the 'Stage' to 'Banked' and then click 'Make Payment'
- Repeat for the other invoice.

### 7.2.13 Reconciling Bank Transactions

Head Office will handle Credit Card and Direct Debit payments; refer to franchisee user manual for Terms & Conditions, so you do not need to do anything with these once the invoice has been raised.

You do need to register that adverts paid for by cheque or cash have been paid into the bank.

- Select the "Finances" area within the Intranet
- Select "Invoicing" and then "Mass Payment"
- Click "View Invoices" to see all the outstanding invoices
- Select the Payment Method "Cash / Cheque", select the Payment Stage "Banked" and then set the date that you paid the money into the bank
- Select the invoices that you paid into the bank and the amount will be totalled automatically.

## 7.2.14 Marketing Campaigns

All Marketing Campaigns and emails to groups of people are managed from the Campaigns module within the CRM section



There will be 3 main types of campaign:

- Telesales – Calling a list of target companies.
- Newsletter – Regular emails to a list of target companies
- Email – One off, or irregular, emails to a list of target companies.

A campaign is run against one or more Target Lists

## 7.2.15 Creating a Target List

You can select individual records, or select a report to use to fill the target list, e.g. "Previous Customers who do not have a current advert".

- From the Campaign module select 'Create Target List'
- Enter the name for this Target List. It is always best to give a description name, e.g. "March Telesales Call List".
- Select the Type of List. The list types are:
  - Default – The list of people who are going to receive the email or phone call.
  - Test – A list of people who will receive a test email
  - Suppression – A list of people who you want excluded from the campaign
  - Seed – A list of people who will receive the campaign email, but will not be tracked as potential leads. This would be used if you want to copy Head Office, or staff in on the campaign emails, whilst ensuring they are not treated as potential leads.
- Save the Target List

The Target List now needs to be populated.

- Scroll down to the 3 sub panels titled 'Targets', 'Contacts' (Customer contacts) and 'Leads'.
- Use the 'Select' Option to select records individually

- Use the 'Select from Reports' to fill the Target List with the list generated by the selected report.

*TIP* – It is a good idea to run the report you want use first (from the 'Reports' module) to make sure it is returning the list you want. If it does not, you may need to alter some of the filter options within the report, for example a date range, to get the list you're looking for.

You can create as many Target Lists as you choose, to group different contacts together for different campaigns.

### **7.2.16 Creating a Campaign**

Now that we have created our Target Lists we can create a Campaign.

- From the 'Campaigns' module select 'Campaign Wizard'
- Select the Campaign Type and then 'Start'. The Campaign Types are:
  - Newsletter – For regular emails – for example the monthly email reminding customers of the copy dates for the book
  - Email – For marketing campaigns.
  - Non-email Based – For example the Telesales calls.
- The process for each of these is slightly different and described below

## 7.2.17 Newsletter Campaigns

- Complete the Campaign Header information:
  - Name – The name of the Campaign
  - Status – Set this to 'Active'
  - Start Date – The Intended start date of the campaign
  - End Date – The intended end date of the campaign.
  -
- Click 'Next'. You do not need to enter any budget details, so click 'Next' again.
- The 'Campaign Trackers' section allows you to create special links which can be added to your email to see whether people have clicked on them. We will not use them at this time, so click 'Next'.
- Select one of the Target Lists we created earlier for the Subscription List. If you created a 'Test' Target List add this to the Test List Subscription.
- 
- Select 'Next' and now we set up the email to be sent out.
  - Name – The name of the email
  - Use Mailbox – Select the name of the mailbox that will receive any bounced emails.
  - Status – The status of the email – only emails with a status of 'Active' will be sent out. During the setup and testing phase, the status should be set to 'Inactive'
  - From Name – The 'name' you would like the email recipient to see.
  - Start Date & Time – The earliest time you would like the email sent. When this date/time is reached and if the status of the email is 'Active' it will be scheduled to be sent to the selected Target Lists.
  - Email Template – Select the email template you wish to use for this campaign, or click 'Create' to create a new email.
  - Select the Targets Lists you wish to send the email to.
  -
- Click 'Next'
- 
- The campaign is now built. Select one of:
  - Finish – Shows the Campaign Summary
  - Send as Test – Will send the email to the Test Target List, so that you can check it is correct.
  - Schedule Email – Says that everything is ready to go and the emails will be scheduled to be sent after the scheduled date/time is reached.

## 7.2.18 Email Campaigns

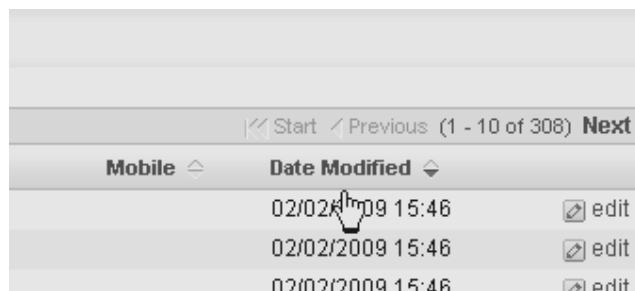
- Complete the Campaign Header information:
  - Name – The name of the Campaign
  - Status – Set this to 'Active'
  - Start Date – The Intended start date of the campaign
  - End Date – The intended end date of the campaign.
  -
- Click 'Next'. You do not need to enter any budget details, so click 'Next' again.
- The 'Campaign Trackers' section allows you to create special links which can be added to your email to see whether people have clicked on them. We will not use them at this time, so click 'Next'.
- Select the Target Lists you want to use for this email. You can select more than one. It is always advisable to select at least one Test Target List so that you can check the emails are correct before sending to the main list.
- Select 'Next' and now we set up the email to be sent out.
  - Name – The name of the email
  - Use Mailbox – Select the name of the mailbox that will receive any bounced emails.
  - Status – The status of the email – only emails with a status of 'Active' will be sent out. During the setup and testing phase, the status should be set to 'Inactive'
  - From Name – The 'name' you would like the email recipient to see.
  - Start Date & Time – The earliest time you would like the email sent. When this date/time is reached and if the status of the email is 'Active' it will be scheduled to be sent to the selected Target Lists.
  - Email Template – Select the email template you wish to use for this campaign, or click 'Create' to create a new email.
  - Select the Targets Lists you wish to send the email to.
- Click 'Next'
- The campaign is now built. Select one of:
  - Finish – Shows the Campaign Summary
  - Send as Test – Will send the email to the Test Target List, so that you can check it is correct.
  - Schedule Email – Says that everything is ready to go and the emails will be scheduled to be sent after the scheduled date/time is reached.

## 7.2.19 Telesales Campaigns

- Complete the Campaign Header information:
  - Name – The name of the Campaign
  - Status – Set this to 'Active'
  - Start Date – The Intended start date of the campaign
  - End Date – The intended end date of the campaign.
- Click 'Next'. You do not need to enter any budget details, so click 'Next' again.
- The 'Campaign Trackers' section allows you to create special links which can be added to your email to see whether people have clicked on them. We will not use them at this time, so click 'Next'.
- Select the Target Lists you want to use for the Telesales campaign. You can select more than one.
- Click 'Next'
- The campaign is now built.

To run the telesales campaign:

- From the 'Campaigns' Module click on 'Target Lists'
- Select the Target List you wish to use.
- The list of Targets for call will be displayed 20 at a time.
- The 'Date Modified' column will show the last time the Target was contacted. Click on the 'Date Modified' column heading to get the records ordered with the oldest appearing first.



The screenshot shows a table with two columns: 'Mobile' and 'Date Modified'. The 'Date Modified' column is sorted in ascending order. The table contains three rows of data, each with an 'edit' link. The table is part of a larger interface with navigation buttons like 'Start', 'Previous (1 - 10 of 308)', and 'Next'.

Mobile	Date Modified	
	02/02/2009 15:46	edit
	02/02/2009 15:46	edit
	02/02/2009 15:46	edit

- The contact details of each target will be in the list.
- Make the call
  - If Target wants more information, or to place a booking, open the target record and click on 'Convert Target' to create the Lead record and then follow the usual Lead conversion and booking process.
  - If the Target wasn't interested, edit the record and add the notes to the description field and save the changes.
  - If you couldn't get through, do not edit the record and it will stay at the top of the list to try again later.

Remember to ensure that as many businesses as possible know about you, what you do, and how to contact you if they want to advertise.

It is crucial that the database is kept up to date with comprehensive customer details and requirements through regular house-keeping. Make sure that you capture as much detail as you possibly can when you are talking to the customer.

Please be advised that by obtaining and storing data on your Customer Database you are required to comply with the eight principles of the 1998 Data Protection Act. For further information about the Data Protection Act and how it affects you we recommend that you visit the IT & e-Commerce section of the Business Link website at [www.businesslink.gov.uk](http://www.businesslink.gov.uk).

## 8 Support

This section covers all the different ways in which Look Local can support you, remember we are only a click or call away, whatever your question please don't hesitate to ask.

### 8.1.1 [www.looklocal.com](http://www.looklocal.com)

In the password protected franchisee area of [looklocal.com](http://looklocal.com) you will find our 'Frequently asked questions section' (FAQ's). Here you will find answers to the most common questions. Have a look through this section to see if you can get the answer to your question.

### 8.1.2 Email

We have a support email address: [support@looklocal.com](mailto:support@looklocal.com) . We aim to answer questions to this email within 1 hour during office hours. If you email to this address during the weekends or holidays we will get back with you answer just as soon as the office re opens.

### 8.1.3 Telephone

Our telephone support line 0870 803 3955 is open Monday to Friday 10:00 - 16:00 except bank holidays. The head office staff will help you with you problem or get someone to call you back if you questions are specific to a certain area of the business

### 8.1.4 Skype

Skype® is what Look Local use for instant messaging and support. You can download Skype® from the link at the top of the franchisee area of our website or go directly to [www.skype.co.uk](http://www.skype.co.uk)

Follow the simple instructions to download Skype and within minutes you will be able to ask Look Local questions, send messages and chat with other Look Local franchisees. Skype will ask you for a username that will be displayed to other people on the web. You should call yourself by your name and your area ie. Matt Shaw – Solihull. You will need to search Skype® for 'looklocal1' when you have found it add them to your contacts and send them a test message.

### 8.1.5 Webchise Support

If you have a problem with the Webchise System we have a dedicated support team who will deal with any problems. They can be contacted on 0870 050 3014 or email [helpdesk@azuragroup.com](mailto:helpdesk@azuragroup.com)

## 9 Forms

- a. Stationer starter pack information form
- b. CRM franchisee set up info
- c. Advert order form
- d. Flyer distribution order form
- e. Standard terms and conditions
- f. Rates card
- g. 12 month contract (plus customer copy)
- h. Advert amendment form
- i. Launch letter
- j. Information request email
- k. Customer approval
- l. Customer exclusion letter
- m. Fax cover sheet
- n. Conditions of Delivery – Child
- o. Conditions of Delivery – Adult
- p. Child risk assessment
- q. Adult risk assessment
- r. Child Delivers Handbook
- s. Adult Delivers Handbook
- t. Deliverers welcome letter – Adult
- u. Deliverers welcome letter – Child
- v. Permit issue letter
- w. Website filler full
- x. Website filler half
- y. Flyer distribution half
- z. Flyer distribution full
- za. Deliverers required quarter
- zb. Deliverers required half
- zc. General filler half