



BottomLine
CONCEPTS™
Helping American businesses reinvest in themselves



ERC Sales Stages

1. NEW LEAD

A new lead has been submitted and is assigned an ERC Advisor

2. MEETING BOOKED

The Potential Client has a scheduled call with the ERC Advisor

3. NO SHOW

The ERC Advisor has attempted to call the client via phone and email but was unsuccessful.

4. AWAITING DECISION

The client is taking time to review materials and decide on next step.

5. AGREEMENT SENT

The Letter of Engagement has been delivered to the Client for E-Signature via Panda Documents

6. CLIENT UNRESPONSIVE

The client has not responded the ERC Advisor or the Project Management team since our contract was sent out.

7. AGREEMENT SIGNED

The client has successfully signed our ERC agreement to move forward with Bottom Line's service and consulting fee.

8. PROJECT MANAGEMENT INTRODUCTION

Client meets with an onboarding specialist to explain the process and assigns a dedicated Project Manager.

9. QUESTIONNAIRE & GATHERING DOCUMENTS

Client request to fill out eligibility questionnaire and upload the necessary documents to the dedicated portal.

10. CLIENT UNRESPONSIVE

The client has signed the ERC contract but has not moved forward and is non-responsive.

11. DOCUMENTS UNDER REVIEW

All data has been received and our ERC Data Review specialists begin to calculate the ERC refund total

12. DOCUMENTS TO BE SUBMITTED TO IRS

Total refund amount is calculated and presented to the client and 941 Preparation Begins.

13. DOCUMENTS SUBMITTED TO IRS

Bottom Line receives confirmation from the client to submit 941x Forms to the IRS on their behalf