THE SECTOR FIELD GUIDES / OCTOBER 2026

Digital signage lead generation

Find the project behind the screen.

A detailed operating playbook for building a relevant account list, earning an informed conversation, qualifying the next step and testing the commercial model.

24	05	08
Detailed chapters	Explained templates	Workbook sheets

UK contact-rule examples. GBP financial scenarios.

All worked examples are fictional. Methods, cadences and scoring models are operating proposals, not measured sector benchmarks or guaranteed results. No named clients, vendors or example companies are included.

Use the matching eight-sheet workbook alongside this guide. Keep qualification evidence, unknowns, decision owners and approved next actions visible.

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FIELD GUIDE / 01

Build a pipeline of projects, not a list of screen buyers

A display is only one part of a signage project. The buyer also needs a place to install it, useful content, a way to update it and someone who will keep it working. AVIXA describes digital signage as a system that combines displays, software, content and deployment decisions.

Your sales process should reflect that. Start with a business use case and a site. Then find the person who can move that project forward.

This guide is for suppliers, installers and AV integrators selling commercial displays, window screens, menu boards, LED installations, video walls and managed signage. It is not a guide to selling advertising space on a media network.

The first useful outcome

Build a small, verified list for one use case. Give those buyers a reason to discuss their project. Pass only suitable conversations to sales. A qualified conversation is not an installation order.

Start in one hour. Choose one use case and service area. Write the five conditions a project must meet. Research five accounts. Draft one useful first offer. Agree who handles replies. Check the channel rules in section 21 before any outreach.

Use the guide in order for a new campaign. For a live campaign, start at the leak: poor replies, section 09; weak meetings, section 13; expensive site visits, section 15; poor returns, section 19.

WORKING NOTES

Evidence rule. The scripts, planning ranges and worked examples are original operating proposals. They are not measured sector benchmarks. All fictional records are labelled. Source links support the external facts, not a promise of results.

FIELD GUIDE / 02

Choose one use case with a clear commercial reason

Do not put every business with a window in one campaign. A restaurant menu change, an estate agency listing feed and a large LED wall require different buyers, proof and next steps.

Starting market	Problem to test with the buyer	Likely first discussion
Shopfront retail	Outdated promotions, poor daylight visibility or a planned store refresh	Window and content fit
Cafés, takeaways and restaurant groups	Menu changes, daypart content or inconsistent offers across sites	Menu-update workflow
Estate and letting agencies	Manual listing changes or a branch refurbishment	Display and listing-feed feasibility
Gyms and leisure venues	Membership offers, classes or sponsor messages need frequent changes	Reception or window communication
Multi-site workplaces	Local teams publish different notices with no clear owner	Content control and deployment
Outdoor LED projects	A defined site needs a large or exposed display	Site, permissions and engineering scope

These are segment hypotheses. Confirm the problem rather than claiming it exists.

Write the campaign boundary

Use this sentence: “We will approach [type of operator] in [service area] about [use case], where [project condition] is visible or confirmed.”

Set a minimum viable job using your actual margin and travel costs. A single site may be worth serving. A large group may be a poor fit if it requires national support you cannot provide.

Review recent jobs before choosing. Which produced good contribution, few callouts, prompt payment and repeat work? Find their shared operating traits. Do not use revenue alone to choose the next segment.

First decision: select one row. Keep other markets in the backlog until this campaign has a clear owner and enough evidence to improve.

FIELD GUIDE / 03

Use visible project signals without inventing buying intent

A signal earns a relevant question. It does not prove dissatisfaction, budget or permission to contact the person.

Observed signal	Where to verify it	Relevant question
A new branch is announced	Operator announcement or site page	“Has the display and content plan been set?”
A refurbishment is planned	Buyer statement, project notice or contractor announcement	“When will signage decisions be made?”
A menu range has changed	Dated menu or brand announcement	“How do site teams publish the changes?”
More franchise sites are opening	Franchisor or franchisee announcement	“Who owns display standards and purchasing?”
A store brand has changed	Official rebrand announcement	“Is the physical display estate in scope?”
A buyer asks for supplier options	Direct enquiry or authorised tender route	“What must a supplier show to be considered?”

Do not write “your screens are underperforming” after seeing one photograph. It may be old. The screen may have been off before opening. The viewing angle may make a good display look poor.

Keep a short signal record

Store the account, site, event date, source URL, date checked, exact observation and the question it supports. Add what remains unknown. Put the signal on hold when the source is stale or the project has already been awarded.

For a first test, review opening and refurbishment signals each week. Review standing use cases on a slower schedule. These are suggested work rhythms, not known buying-cycle lengths.

Research example: “The operator announced a second café. Menu board ownership is unknown.” Not evidence: “The operator urgently needs a three-screen installation.”

FIELD GUIDE / 04

Separate the group, the site and the buying role

One chain can contain company-owned branches, franchise sites and leased concessions. Do not assume one branch manager can approve a group rollout.

Create one account record for the legal or commercial buying unit. Link its sites underneath it. Keep separate buying units separate even when they share a brand.

Role	What to learn	Useful first asset
Owner or franchisee	Local authority, commercial goal and site timing	One-site fit sheet
Operations or area manager	Change process, rollout workload and service needs	Multi-site readiness checklist
Marketing lead	Content, promotions and brand control	Content approval map
Property or facilities lead	Mounting, access, landlord and works planning	Site information checklist
IT contact	Network access, account control and support requirements	Technical dependency list
Procurement or finance	Supplier route, cost scope and approval process	Like-for-like scope comparison
Architect or fit-out contractor	Design stage, specification and handoff responsibility	Project interface checklist

Map the role, not just the seniority. A facilities manager may unblock a site faster than a chief executive.

Contact one useful person first

Choose the role closest to the problem. Ask for routing when ownership is unclear. Add a second stakeholder only for a distinct reason. Record who is already speaking with your team.

Avoid sending the same pitch to six people at one business. It creates duplicate replies and makes ownership harder to manage. A request not to contact the business must be respected across the account.

Your output: one account owner, one likely project owner and the next stakeholder needed. Unknown is an acceptable field value. A guessed decision maker is not a qualified one.

FIELD GUIDE / 05

Build the account list before buying contact data

Use public sources to identify businesses and sites. Verify people only after the account has a reason to be in the campaign.

Start with operator location pages and brand news. Then check trade directories, fit-out project pages and public tender notices. The UK Find a Tender route can help locate public-sector opportunities. Follow each notice's own contact and procurement rules.

A practical research sequence

1. Confirm the business and the buying unit. Check whether a location is open, planned or closed.

2. Identify the relevant site and use case. Do not collect a thousand unrelated locations.

3. Record a current source and a fact that supports your question.

4. Check service geography, installation capability and likely job fit.

5. Find the relevant business role. Verify that the person still holds it.

6. Check the permitted contact route, suppression records and any active opportunity.

7. Release the account only when another team member could explain why it belongs.

Use search patterns such as [operator] new opening, [operator] refurbishment, [brand] franchise expansion, [town] retail fit out and [operator] property or facilities contact. These are research prompts, not a licence to scrape personal data.

Minimum record

Keep account ID, trading name, buying unit, parent group, site address, use case, source, observation date, role, contact evidence, channel decision, owner and status.

Do not infer an email address from a name and send to it without verification. Do not treat a directory listing as marketing permission.

Quality check: inspect a sample before releasing the batch. If the first ten records contain closed sites, duplicate groups or unsupported claims, fix the list rules before writing more copy.

FIELD GUIDE / 06

Prioritise work without hiding hard failures

A score should help allocate research time. It must not turn a poor-fit account into a qualified meeting.

Apply hard gates first: service area, capability fit, a permitted contact route, no suppression and no excluded active opportunity. A failed gate means stop. An unknown gate means hold until checked.

For accounts that pass, use a simple research priority score.

Factor	0 points	1 point	2 points
Project evidence	No current evidence	Plausible use case only	A verified project or change
Buyer access	No role identified	Relevant role found	Owner confirmed or introduced
Delivery fit	Material uncertainty	Standard work with one gap	Strong fit with available capacity
Commercial fit	Job value is unknown	Likely viable, not confirmed	Buyer context supports viability

A suggested starting rule is 6–8 points for first review, 3–5 for more research and 0–2 for a low-priority hold. These bands are test defaults. They are not conversion probabilities.

Do not award “confirmed” points because a buyer has many branches. A group can buy one display. A small operator can fund a good project.

Keep a reason beside the score

Write one sentence: “Verified opening, local installation coverage and a named operations owner; budget is not yet known.”

Review the score against real outcomes. Did high-priority accounts attend? Did they become suitable opportunities? Which factor predicted poor fit? Change the rubric when the evidence changes.

Do not optimise the score itself. Optimise accepted conversations and profitable projects. A flattering number cannot replace a useful reason to call.

FIELD GUIDE / 07

Offer a small decision, not a free design department

A first offer should solve a narrow problem without forcing the prospect into a full specification exercise.

Entry offer	What the buyer provides	What you return	Boundary
Site-fit review	One site, its goal and optional authorised photos	Fit questions and a recommended next assessment	No engineering approval or final specification
Menu-change map	How menus are updated and who approves them	A simple update and approval workflow	No free content production programme
Rollout readiness review	Site count, buying structure and broad timing	A phased scope and unknowns list	No fixed rollout price before survey

Choose one offer for the campaign. The deliverable should be useful even when the prospect does not buy.

Example promise

“Bring one site and the communication job it needs to do. We will identify the information needed to assess display, content and installation fit. You keep the checklist. A quote follows only when the scope is clear.”

Set a real time limit for free work. For example, a 20-minute discussion and a one-page summary may fit your sales process. A site survey, structural design or custom content sample may need a separate agreed fee. Test the scope against your actual labour cost.

Never promise a sales uplift just to get the meeting. Do not claim a full installation can be priced from a street photograph.

Exit rule: if the buyer has no relevant project and only wants a catalogue, send the useful material through the permitted route. Do not label that as an accepted sales appointment.

FIELD GUIDE / 08

Build proof around the buyer's exact concern

Prepare a small evidence pack before outreach. Do not use a long company presentation as the default first response.

Use one relevant project example, one scope sample and one explanation of how service works. Obtain permission for client photos, names and results before publishing them.

The project evidence sheet

Show the use case, site conditions, starting problem, supplied scope, installation constraints and support arrangement. State when the work happened. Explain what was measured and what was not.

A before-and-after photo can demonstrate appearance. It does not prove extra revenue. A screen schedule can show content control. It does not prove that all locations followed it.

For window projects, explain how the final hardware choice was checked against light, heat, orientation and mounting requirements. Manufacturer specifications differ, including operating temperature and brightness limits. Do not apply one product's limits to the whole category.

Give the buyer a comparable scope

Separate the display, player or controller, mounting and installation. Show network work, the CMS licence and content costs. Add training and ongoing support as distinct items. Mark exclusions.

Where proof is thin, show the process honestly. An example site checklist and a well-scoped pilot can still help a buyer assess you. Do not invent a customer result.

Proof gap log: record the objection, the evidence available, the missing evidence and who will obtain it. Use that log to improve future case studies instead of adding unsupported claims to emails.

FIELD GUIDE / 09

Write the first email around one job

Use these as starting drafts. Replace every bracket. Use only a verified event and an offer your team can deliver. Add your normal business identity, contact details and a working opt-out route.

Template 1: a new hospitality site

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: menu screens for [new site]

Hi [first name],

Your announcement says [site] is opening in [period].

Has the menu-screen plan been set, including who will update prices and offers?

We help [relevant operator type] with the display, installation and content setup. A short site-fit review would show what needs checking before a quote.

Would the checklist be useful, or is someone else handling this?

[sender name] [business name and contact details] Not relevant? Reply "no" and I will stop.

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[new site] — Name the site or buying unit in scope. Check whether purchasing and content responsibilities sit locally or centrally.

[first name] — Use the verified recipient’s preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[site] — Name the site or buying unit in scope. Check whether purchasing and content responsibilities sit locally or centrally.

[period] — Use a confirmed period, and distinguish decision, announcement and delivery dates. Do not manufacture urgency.

[relevant operator type] — Use a verified, buyer-relevant detail that explains the reason for contact. Remove the line if it cannot be substantiated or adds no relevant evidence.

[sender name] — Use the real sender and required business identity and contact details. Do not invent an affiliation or conceal the authorising business.

[business name and contact details] — Use the real sender and required business identity and contact details. Do not invent an affiliation or conceal the authorising business.

Template 2: shopfront visibility

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: [site] window display plan

Hi [first name],

I saw the published plans for [verified opening or refresh].

Is the window display part of that work?

We supply and install commercial signage. Before recommending a screen, we check the viewing conditions, content plan and installation limits.

I can send a one-page window-fit checklist. Would that help your project team?

[sender identity, contact details and opt-out]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[site] — Name the site or buying unit in scope. Check whether purchasing and content responsibilities sit locally or centrally.

[first name] — Use the verified recipient's preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[verified opening or refresh] — Use a relevant, verified public fact. Save its source and date. State the observation without inventing pain, budget or buying intent.

[sender identity, contact details and opt-out] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Do not send template 2 without the stated plans. Replace the observation with a truthful use-case question instead.

Why this structure is useful

The observation explains relevance. The question exposes the decision. The offer makes the next step concrete. The opt-out gives a clear way to end contact. There is no fake audit, false familiarity or promised sales gain.

FIELD GUIDE / 10

Adapt the message for property, groups and partners

These drafts address different buying jobs. They are not extra emails to send to everyone.

Template 3: estate agency listing updates

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: keeping branch displays current

Hi [first name],

Who owns the process for updating listings on your branch displays?

We work on signage projects where the display and the content feed need to be assessed together. The first check is whether the current data source, permissions and update rules can support the plan.

Would a listing-display readiness checklist help your branch or operations team?

[sender identity, contact details and opt-out]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[first name] — Use the verified recipient's preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[sender identity, contact details and opt-out] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Do not claim an integration exists until the feed, API access, licence and technical scope have been checked.

Template 4: a multi-site operator

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: one display plan across [site group]

Hi [first name],

Your [dated announcement] mentions [verified expansion or refresh].

Will display purchasing and content approval sit with head office or with each site?

We can map the pilot, approval and support decisions before a wider rollout is priced.

Would a short rollout-readiness discussion be relevant?

[sender identity, contact details and opt-out]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[site group] — Name the site or buying unit in scope. Check whether purchasing and content responsibilities sit locally or centrally.

[first name] — Use the verified recipient's preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[dated announcement] — Use a relevant, verified public fact. Save its source and date. State the observation without inventing pain, budget or buying intent.

[verified expansion or refresh] — Use a relevant, verified public fact. Save its source and date. State the observation without inventing pain, budget or buying intent.

[sender identity, contact details and opt-out] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Template 5: a fit-out partner

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: display scope on fit-out projects

Hi [first name],

When a client adds digital screens to a fit-out, who takes responsibility for the display, mounting, power and content handoff?

We support [actual service area and capability]. I can send a one-page interface checklist so each trade knows what it owns.

Would that be useful for your next suitable project?

[sender identity, contact details and opt-out]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[first name] — Use the verified recipient's preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[actual service area and capability] — Name one workflow or capability that you can genuinely investigate or deliver. Narrow scope makes the question answerable.

[sender identity, contact details and opt-out] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Never imply that the partner has referred a client before they have done so. Agree commercial terms, client ownership and permission before sharing client information.

Set up a partner handoff that protects the project

Ask the partner to introduce you with the buyer's knowledge. Agree who owns discovery, who prepares the display scope and who sends the quote. State which trade owns mounting, power, network access and finishing work. A gap between trades can turn a good lead into a costly site return.

Use one shared project brief with approved access. Record the buyer's decision date and the next action. Do not ask the partner to send an unrestricted client list. Start with one suitable project and review how the handoff worked before asking for more introductions.

Measure accepted project introductions and won contribution. Do not count every contractor conversation as a sales lead.

FIELD GUIDE / 11

Coordinate calling and professional-network around the same record

Use a phone call to clarify ownership or continue an interested discussion, where the channel is permitted. Use professional-network for a relevant professional exchange, not as a workaround for an email restriction.

A direct call opener

WORKING NOTES

Hello [name], this is [your name] from [business].

This is a sales call about commercial signage. Is now a bad time for one brief question?

I saw [verified site event]. Who is handling the display and content plan for that project?

When the right person engages: “Is the main job to attract attention outside, update menus, or communicate with people already inside?” Follow the answer. Do not read all three branches of the script.

A professional-network message after a genuine exchange

WORKING NOTES

Thanks for discussing [specific topic].

Here is the site-fit checklist I mentioned. It covers the use case, viewing conditions, content owner and installation questions.

The checklist works without a call. A fit review is the next step only when there is a project to assess.

A connection acceptance is not a purchase signal or blanket marketing consent. Keep the contact and channel rules attached to the record.

Routing questions

Ask the receptionist which role handles the project. State who you are and why you are calling. Do not pretend to be a customer, contractor or existing supplier.

Where a prospect says “email the information,” confirm what they want and record that request. Send the promised information first. Do not use it as permission for unrelated campaigns.

FIELD GUIDE / 12

Run a short sequence with a reason for every touch

The following is a suggested 15-business-day test, not a proven best cadence. Use fewer touches where buyer preferences, legal rules or account context call for it.

Test day	Action	New value or decision
1	Relevant first message	Ask about one project decision
4	Permitted routing call or brief follow-up	Confirm ownership or offer the checklist
8	Share one relevant scope example, where permitted	Explain what a comparable assessment includes
12	Ask whether timing is wrong	Route to active discussion, buyer-led later date or stop
15	Close the sequence	Leave the asset and stop active pursuit

This is an account-level plan. It is not five touches per person across every channel. Do not stack a call, email and direct message on the same day simply to increase activity.

Stop and route on any human reply

A positive reply moves to a person, not the next automated step. A negative reply stops the sequence. A request for later contact records the date, reason and permitted route. An out-of-office response does not count as interest.

Use a coverage rota for replies. A useful operating target is a response within the same business day, with a backup owner. Treat this as your service standard, not a universal conversion benchmark.

After the sequence: do not put silent contacts straight into another sequence. Re-contact only where a new reason, the contact rules and the person's preferences support it. Silence does not create consent.

FIELD GUIDE / 13

Qualify the conversation before consuming sales time

Agree meeting gates before the campaign starts. Use three outcomes: accept, hold or decline. A meeting must pass every mandatory gate. A score cannot compensate for a failed one.

Gate	Evidence needed	Hold or decline example
Account and geography	Buying unit and site are within agreed scope	Travel or support area is outside capability
Use case	Buyer agrees there is a relevant display or content decision	General interest in screens with no relevant discussion
Buyer role	Attendee owns, influences or can route the project	Person cannot connect the discussion to the buyer
Informed interest	Buyer knows the meeting purpose and agrees to it	“Send a catalogue” only
Delivery fit	No known hard conflict with your capability	Unsafe or unsupported installation requirement
Commercial rules	Campaign-specific minimums, if required, have evidence	Mandatory job-size condition remains unknown
Exclusions	No duplicate, suppression or excluded opportunity	Existing salesperson is already handling the job

Budget, final screen count and technical details can be unknown at an early fit review. Make them mandatory only when your campaign truly requires them. Do not make buyers complete a full engineering questionnaire just to have an initial discussion.

Three decisions

Accept: an operations manager wants to assess menu screens for a named upcoming site and agrees to a fit review. Final specification is open.

Hold: a franchise manager is interested but does not know who can approve local works.

Decline: the buyer needs installation outside your supported region and no approved delivery partner exists.

Keep booked, held, qualified and accepted statuses separate. Payment rules are a separate agreement.

FIELD GUIDE / 14

Turn replies into a useful next step

Answer the question before asking for time. Do not force every reply into a meeting.

Buyer reply	Useful response	CRM action
“How much?”	Explain cost components and the minimum scope needed for a valid price	Price enquiry, not yet qualified
“Send details”	Send the requested one-page asset. Ask which use case matters	Information requested
“We already have a supplier”	Ask whether this is a closed relationship or a future review topic, without attacking the supplier	Stop or buyer-led nurture
“Head office decides”	Ask which role owns the standard and whether an introduction is appropriate	Route
“No budget now”	Ask whether there is a planned review date only if the buyer wishes to continue	Hold with reason
“Not interested”	Acknowledge and stop	Suppress

Price response

WORKING NOTES

The price depends on the display, mounting, installation, software and content scope.

For your site, I would need to confirm [two material unknowns] before giving a reliable figure. I can send the scope checklist first. A call is useful only if you want to assess the project.

Booking response after qualification

WORKING NOTES

The review will cover [site/use case], the open fit questions and whether a survey is the right next step.

Would [date/time/time zone] or [date/time/time zone] suit? You can also use [working booking link].

Please bring [one optional item]. No technical access is needed.

Never send an unsolicited calendar hold. Confirm the purpose, duration, attendees and time zone. The buyer should know what will happen before accepting the invitation.

FIELD GUIDE / 15

Run the first call before scheduling a site visit

Use the first call to decide whether a survey, quote or no further work makes sense. Do not use it to recite the product catalogue.

A 20-minute fit-review agenda

Minutes 0–3: agree the job. “What should someone see or do differently because the display is there?” Establish whether the screen faces passing traffic, an ordering queue or an indoor audience.

Minutes 3–8: understand the current process. Ask how content changes now, how often it changes, who approves it and what has prompted the review.

Minutes 8–13: check the site at a high level. Ask about the location, indoor or outdoor exposure, daylight, broad mounting options, power, network and access. Record uncertainty. Do not give engineering approval.

Minutes 13–17: map the buying path. Who owns the site, design, spend and installation timetable? Is there a fit-out contractor or landlord approval step? What must happen before a supplier is chosen?

Minutes 17–20: agree one next step. A survey, a scope clarification, a content workflow review or a closed file are all valid outcomes.

A good close

“We have a clear use case, but the mounting and power route still need checking. The next step is a scoped survey, not a final equipment recommendation. Who needs to approve that?”

Record the buyer's words. Do not convert “we are considering options” into “ready to buy.”

Survey gate: confirm purpose, access, responsible people, fee or no-fee terms, and what the survey will produce before travel is booked.

FIELD GUIDE / 16

Capture enough site detail to avoid an expensive false start

The sales brief is not a technical design. It should reveal which specialist checks are needed.

Area	Capture in the brief	Specialist check before commitment
Viewing	Audience, direction, distance and dwell time	Readability, display size and final placement
Environment	Inside, behind glass or fully outside; hours of use	Temperature, light, enclosure and product rating
Structure	Proposed position and known surface	Fixings, loads and safe installation method
Services	Known power and network access	Electrical and network suitability

Area	Capture in the brief	Specialist check before commitment
Content	Formats, update frequency and approver	CMS compatibility, licences and content rights
Access	Trading hours, delivery access and work restrictions	Installation plan and site safety
Permissions	Landlord, site owner and planning contacts	Applicable approvals and responsibilities
Support	Sites, uptime needs and contact route	Service scope, spares, warranty and response terms

A behind-glass display is not automatically suitable for full outdoor use. Check the selected manufacturer's specifications. A visual mock-up does not establish structural or electrical feasibility.

In England, advertisement controls may be relevant to a display. Applicability depends on the actual sign, site and rules. Use the official guidance and local planning authority rather than assuming all digital signage needs the same consent. Check separate rules in other jurisdictions.

Protect the handoff

Mark each technical point as confirmed, buyer-reported, observed or unknown. State who must validate it. Do not let “probably fine” become a promise in the proposal.

FIELD GUIDE / 17

Make a pilot answer a rollout decision

A pilot should remove uncertainty before a wider commitment. It is not a free installation offered because sales lacks confidence.

Write the decision first: “Can this design and operating process support the next group of sites at an acceptable cost and workload?”

Agree the pilot site, duration and scope. Set out the buyer's tasks, success measures and decision date. Use a paid pilot where the delivery cost requires it. Explain ownership, removal, continuation and licence terms in writing.

Measure three types of outcome

Technical: content displays as intended, the update process works and reported faults are resolved within the agreed scope.

Operational: the buyer can approve and publish a change, recover from a mistake and identify who owns support.

Commercial: the buyer's chosen business measure improves enough to justify further review. Sales, enquiries or offer use require a baseline and careful interpretation.

Do not attribute a revenue change to the display when prices, staffing, promotions or footfall also changed. Where practical, compare similar sites or periods and record those differences. A pilot can prove technical and operational fit without proving incremental sales.

Rollout approval

Before expanding, confirm the remaining site types, survey needs, content ownership, installation capacity, support coverage and full costs. Do not assume the pilot site represents every branch.

Decision options: proceed, modify, extend for a defined question or stop. “Keep it running because we have already spent money” is not a success criterion.

FIELD GUIDE / 18

Hand sales a brief they can act on

The following record is fictional. It illustrates an early fit-review handoff, not a real customer result.

Field	Example A: regional café operator
Buying unit	Company-owned group with six existing cafés
Project	One new site; wider rollout has not been approved
Evidence	Fictional buyer conversation: operations manager confirmed an opening project
Use case	Menu and offer updates; final screen count is unknown
Contact role	Operations manager coordinating the opening

Field	Example A: regional café operator
Reason for interest	Wants to understand content control and installation scope
Meeting purpose	Decide what is needed before a site survey
Known conditions	Within installation area; fit-out contractor is appointed
Unknowns	Mounting, power route, network approval, budget and buying sign-off
Acceptance	Accepted for an early fit review under this example's rules
Next owner	Sales lead; technical specialist joins only if needed
Buyer commitment	Attend the agreed review and identify the fit-out contact

What should travel with the record

Attach the source or reply that supports the claim, not an unsupported summary. Include the invite, local time zone, attendees, contact preference and the exact asset promised.

After the meeting, sales records held or not held, accepted or rejected, the reason and the next step. A rejected meeting is useful feedback if the reason is clear.

A rescheduled meeting remains linked to the original record. Do not count it as a second new appointment. Do not call a booked fit review a qualified installation opportunity until the sales process has established that stage.

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Model contribution, not just screen revenue

A project can have a large invoice and little room to fund acquisition. Include hardware, delivery and installation labour. Add subcontractors, expected direct support and other costs tied to the job.

For a planning model:

Project contribution = net project revenue − direct project costs.

Expected acquisition contribution = accepted held meetings × win probability × contribution per won project − total acquisition cost.

Use one time horizon and currency. Exclude VAT from both sides where your accounting treatment makes it recoverable. Ask your accountant how taxes and revenue should be treated.

Fictional worked example, GBP

A completed fictional campaign reaches 200 accounts with one selected contact each. It produces 12 positive account replies, 6 first meetings due, 5 held meetings, 4 accepted meetings and 1 won project.

Measure	Calculation	Result
Positive account reply rate	12 ÷ 200	6%
Attendance	5 ÷ 6	83.3%
Acceptance among held meetings	4 ÷ 5	80%
Cost per accepted held meeting	£1,800 ÷ 4	£450
Acquisition cost per won project	£1,800 ÷ 1	£1,800

The project invoices £12,000 and has £8,400 of direct costs. Contribution is £3,600. After £1,800 of fully loaded acquisition costs, £1,800 remains before other overhead.

At an assumed 25% win rate, expected contribution before acquisition is £900 per accepted meeting. That is a break-even ceiling, not a sensible target price. A lower win rate, higher costs or slow collection can reverse the decision.

Do not add future service revenue at full value. Use its expected contribution over a stated period and account for cancellation, service effort and collection timing.

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Protect survey, installation and support capacity

More meetings are useful only when the next step can be delivered.

Name the owner of research, outreach, replies, fit reviews, surveys, quotes, installations and aftercare. One person may own several tasks, but the queue must still be visible.

A capacity check

Estimate weekly hours for each task: expected volume × observed average time. Include travel, preparation, rework and follow-up. Compare that with productive hours actually available.

A fictional example: eight fit reviews at 45 minutes each, including preparation and notes, require six hours. Four surveys at three hours each, including travel, require twelve hours. If the same person has only ten hours available, the survey stage already exceeds capacity.

Do not solve that by booking more calls. Tighten survey qualification, cluster visits by location, remove duplicate administration or adjust the campaign release rate. Hire only after checking whether the work is necessary and repeatable.

Make the weekly review short

Review accepted held meetings, qualified projects, quotes issued, survey waiting time, quote age, wins, contribution and collected cash. Then inspect the largest queue.

Choose one correction: better site information, faster quote approval, a clearer first offer or more suitable accounts. Do not change the segment, offer, sequence and pricing at once.

Compensation rule: do not reward a setter only for calendar volume. Include an agreed quality review so a weak booking is not worth more than a useful disqualification.

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Set the contact and sending rules before launch

This is an operating checklist, not legal advice. Have the responsible person review the target market and channels.

For UK campaigns, distinguish corporate subscribers from sole traders and some partnerships. Personal business contact data still requires a lawful basis and transparency. Screen live calls against TPS, CTPS and your own suppression records. Identify the sender and provide a valid opt-out route.

Use these controls:

• Record the legal entity, data source, channel decision and objection history.

• Keep only information needed for a relevant business conversation.

• Stop suppressed records across tools and outsourced teams.

• Treat social messages and texts as channels with their own rules, not loopholes.

• Do not upload prospect data into unapproved tools.

Check sender authentication and the current requirements of the providers used by your recipients. Requirements vary by recipient mix and volume. Authentication does not establish consent or guarantee inbox placement.

Keep a clear sender identity. Configure SPF, DKIM and DMARC correctly with the person who manages your email. Monitor delivery failures, complaints and suppression sync. Do not invent a “safe emails per inbox” rule or buy domains to evade enforcement.

Launch stop conditions: missing contact justification, failed suppression sync, misleading copy, unresolved authentication problems or no owner for replies. Fix those before increasing volume.

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Install the campaign in 30 days

This is a setup and learning plan. It does not promise revenue in 30 days. Allow the real buying cycle to mature.

Period	Owner	Work to complete	Exit evidence
Days 1–5	Commercial lead	Choose use case, service area, offer and qualification gates	One approved campaign brief
Days 6–10	Research owner	Build and check the first account batch; map sites and roles	Traceable records with release decisions
Days 11–15	Outreach owner	Run a bounded test with approved scripts and contact rules	Actual replies and complete handling notes
Days 16–20	Sales owner	Run fit reviews; record acceptance and next steps	Usable handoffs and rejection reasons
Days 21–25	Delivery lead	Review survey, quote and installation workload	Capacity and scope corrections
Days 26–30	Commercial lead	Review economics and choose continue, change or stop	Written decision and next test

The first experiment

Keep the same segment and service area. Compare two first offers only if the list is large enough to provide useful feedback. Otherwise, run one offer and learn from the replies before splitting a small sample.

State the test budget, primary measure, quality limits and review date in advance. Use accepted held meetings per released account as one early measure. Keep future meetings separate from no-shows.

A handful of bookings is not proof that one variant is better. Report counts, not only percentages. Inspect the conversations and repeat the test before scaling a large commitment.

Scale gate: the offer is understood, suitable buyers attend, sales accepts the handoff, costs fit the margin and delivery has room.

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Use the campaign and project worksheets

The companion workbook contains blank working sheets and clearly labelled examples. The web edition includes a browser-based qualification check with a downloadable decision record.

Worksheet A: campaign brief

WORKING NOTES

Use case and business problem: Target buying unit and service area: Best-fit project traits: Hard exclusions: Verified signals and source rules: First role to contact: Entry offer and exact free-work boundary: Permitted contact route: Meeting acceptance gates: Research, reply and sales owners: Test budget, dates and primary measure: Stop conditions and review decision:

Worksheet B: site-to-meeting brief

WORKING NOTES

Account ID, buying unit and site: Buyer role and source of role evidence: Confirmed use case and reason for interest: Project timing and buying route: Known site, content and installation facts: Mandatory gates: pass / unknown / fail: Open questions and who will check them: Meeting purpose, attendees and time zone: Promised asset and next action: Post-meeting outcome and rejection reason, if any:

Worksheet C: pilot decision

WORKING NOTES

Decision the pilot must answer: Site and scope: Baseline and success measures: Customer tasks and supplier tasks: Cost, ownership and continuation terms: Technical and commercial unknowns: Review date and decision owner: Proceed / modify / extend for a stated reason / stop:

Use the worksheets as shared working records. Do not require buyers to fill every field before the first conversation. The sales team should capture what it can and show what remains open.

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A final field checklist

Before the first message, confirm that the campaign has one clear use case, a viable service area, a real entry offer and a named reply owner.

Before the meeting, confirm that the person understands the purpose, the project fits the agreed gates and the invite contains the right time zone. Send the promised asset. Make rescheduling easy.

Before the survey, confirm access, ownership, the survey scope and any fee. Do not send a field team to discover information that a short call could have established.

Before the quote, confirm what has been validated and what remains conditional. Separate hardware, works, software, content and service. Do not sell an untested integration as a standard feature.

Before scaling, check contribution, cash timing, survey queues and support capacity. More volume is the last step, not the first repair.

Use the next conversation to improve the system

Ask sales which part of the brief was missing. Ask the delivery team which promise caused rework. Change one field or one step. Then check whether the next project moves more cleanly.

The rule to keep: a good appointment gets the right person closer to a real project decision. A full calendar is not the goal.

Discuss your campaign

Use the companion workbook to record your campaign boundaries, evidence, qualification decisions and next actions before increasing activity.

References & scope

Official and industry references support factual context, not the proposed methods or fictional calculations. This is a planning framework, not legal, tax, engineering or investment advice. Check current requirements with the responsible specialist before use.

AVIXA: What Is Digital Signage?

Industry association overview. Supports the system, content and environment context, not sales outcomes.

Open the official reference

UK Government: Advertisements: planning practice guidance

England-specific planning guidance. Local and devolved rules must be checked separately.

Open the official reference

ICO: Business-to-business marketing

UK marketing guidance. The ICO flags parts of its guidance for review after legislative change.

Open the official reference

ICO: Plan direct marketing

Channel, subscriber and data-protection requirements. Not blanket permission for any list.

Open the official reference

UK Government: Find high value contracts in the public sector

Official procurement discovery route. A notice does not waive its communication or tender rules.

Open the official reference