



New Caller Checklist

That Every Business Should Follow!

You have a new caller on the phone, now what do you do? Train your front receptionists and sales team to follow this guide below and you'll see a big difference in your lead generation.

1. Ask for full contact info from every caller

(remember: EVERY caller is a potential lead).

2. Find out where the caller found out about you by asking, “How did you hear about us?”

*This is a helpful way to track your marketing and see which marketing efforts bring in more leads.

3. Answer the phone with a smile.

Your receptionist may be the first impression someone has with your company. It may sound obvious, but a negative, unprofessional attitude is a red flag to most.

4. Have a professional tone and really care about finding an answer.

Be proactive, go the extra mile to answer their questions and provide additional info to show your company is interested in their business.

5. Offer additional resources that portray you as an expert and help with their request.

For example, if someone is calling to learn more about your new skin care line — direct them to your website for more info or get their email address and send them a video demonstration.

Example Checklist

Here's a sample we created for salons, use this form as a basis to customize one for your industry!

New Caller Checklist

Date: _____

Name: _____

Address: _____

City _____ State _____

Zip _____

Phone _____

Email _____

ok to send newsletter and email promo

How did you hear about us?

Billboard

TV

Postcard

Flyer

Other: _____

Male or Female

Birthday: (to mail or email coupons) _____

Services Interested In: _____

Inquiring for self or for gift: _____
