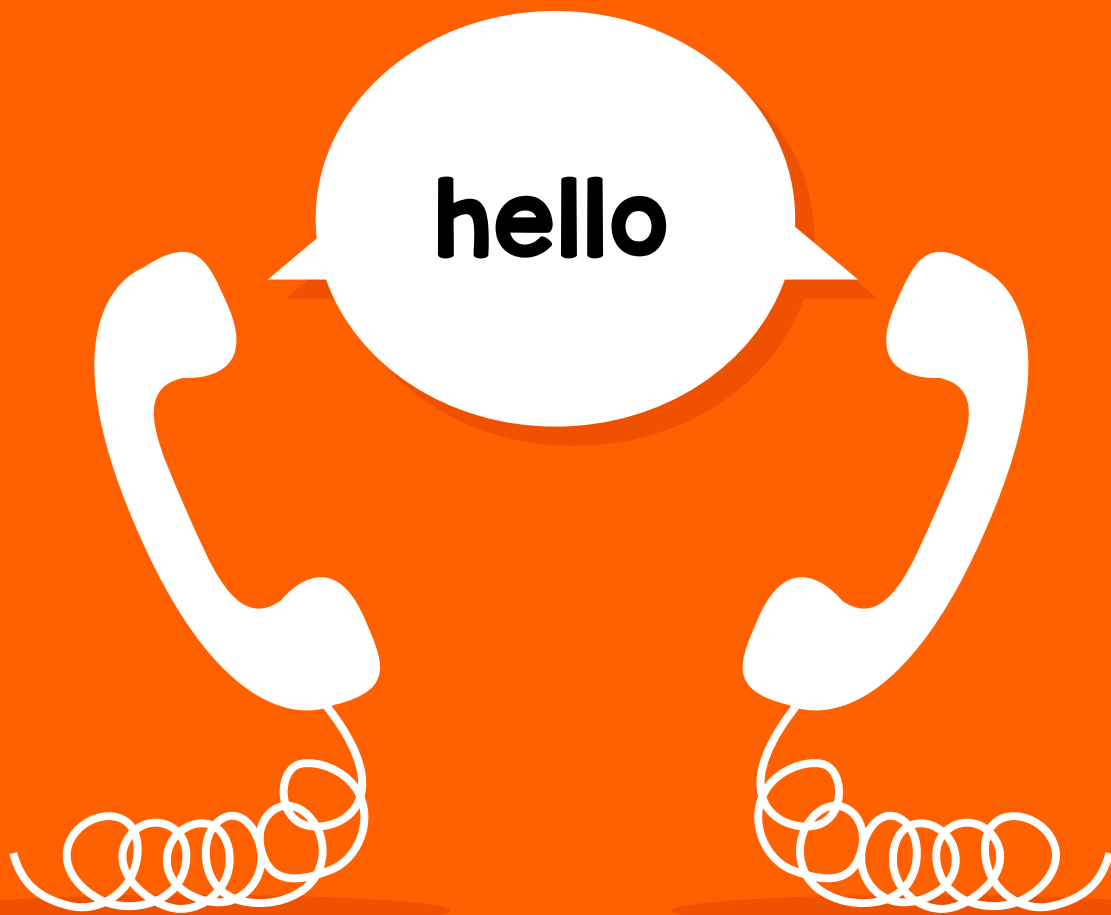


# NEW CALLER CHECKLIST

5 STEPS TO DRAMATICALLY  
IMPROVE YOUR SALES PROCESS



**PostcardMania**

*Postcard Marketing Experts*



The sales conversation begins the moment you pick up the phone. The pleasantries, the small talk, the administrative things (like getting contact info) – all of it factors into the prospect's comfort level with you and your business.

## **Thus and henceforth!**

If you want to put yourself in the best position to close the most amount of sales, you need to provide callers with a consistent reception experience that is kind, professional, and gets all the contact information you need.

## **Here's how you do that...**

Print this out and hand it to your receptionist, greeter team and/or paste it up on your own desk. It's *THAT* important.

## **1. Answer the phone with a smile.**

Your receptionists are the first human experience a prospect has with your company. A positive, upbeat receptionist sets the tone of the entire interaction and puts you in the best position to close the sale.

## **2. Ask for full contact info from every new caller.**

Even though this is probably the MOST important thing your receptionists need to do, it is still easily (and often) forgotten. Use a New Caller Sheet like the example below to ensure you get the contact info for every single caller.

## **3. Find out how the caller found out about you.**

Every caller needs to be asked, “How did you hear about us?” This is crucial to tracking which marketing strategies are working for you. (There is an easier way to do this, too. See the Special Note below.)

## **4. Use a professional, authentic tone of voice.**

Be professional, but not cold. You really need to care about finding answers to the caller’s questions. Be proactive, and go the extra mile to provide top-notch service.

## **5. Offer additional resources.**

Try to always provide the caller with additional resources that will help them get the answers/information they need. If you know of an article on your website that pertains to their question, tell them you will email them a link. Then do it. If you know of a product that would meet their needs (even if you don’t sell it), point them in the right direction. This proves you truly care about their needs and not just your sales. Ironically, this will most definitely improve your sales over time.

### **Special Note:**

*One of the most useful tools (possibly THE most useful tool) for phone sales is [call tracking](#). Call tracking software ensures you never lose a lead by recording all incoming phone calls. It also helps you improve your sales process by tracking which marketing campaigns produce the best results and allowing you to audit your salespeople and receptionists for quality service.*

***Use the template on the next page to create a custom new caller sheet for your receptionists to use!***

# New Caller Checklist

Date \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

Zip \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

OK to send email newsletter and email promo

## How did you hear about us?

Billboard

TV

Postcard

Flyer

Other \_\_\_\_\_

## Products/Services Interested In

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