SALESPATH FREE RESOURCE

SalesPath

Enquiry call checklist

Use it on every new enquiry, so you only quote work worth quoting. Print a stack and keep them by the phone.

Who and where

Name

Phone

Email

Suburb or service area

How did they find you?

Date and time

The job

What needs doing?

Why now? What happens if it waits?

Photos or plans?

Qualify before you quote

- ☐ **Timing.** When do you need it done by?
- ☐ **Budget.** "Most jobs like this land between $___ and $___. Is that in the range you had in mind?"
- ☐ **Who decides.** Is anyone else involved in the decision?
- ☐ **Other quotes.** Are you getting other quotes? How many?
- ☐ **What matters most.** Price, speed, quality or something else?

Fit check

QUESTION	YES	NO
Work we do well?	☐	☐
In our area?	☐	☐
Can we do it when they need it?	☐	☐
Budget in a workable range?	☐	☐

Two or more "No" answers: refer it on or decline politely, before you spend time quoting.

Agree the next step before you hang up

> "So the next step is [site visit / quote by Thursday / call back Monday]. I'll [what you'll do] by [when]. Does that work?"

Next step agreed

Due date

After the call: log it in your quote tracker with the source, status, next step and due date, the same day.