SALES LEAD FORM Call date_____Contact_____
Date lead told sales would call_____

ACTION TO TAKE:
Initial decline/no sales contact_____
Sales contact follow up #1:
Send: ❒ Confirmation date/time:_____❒ Decline ❒ Other_____
Enclose: ❒ Brochure ❒ Other_____
Sales contact follow up #2:
Send: ❒ Follow up ❒ Other_____Enclose: ❒ References_____
❒ Article_____ ❒ Testimonials ❒ Other_____

Thank you for calling [YOUR COMPANY] about your project. If you don't mind I'd like to take a few minutes to ask you some questions which will help us get to know what you need. **PALO**

Personal information:
First I'd like to get some basic information about you; what is your name? If you have a partner, what is that person's name? [Other decision maker?] Your address (inc. zip)? Best number to reach you during the day?, etc.
Client name_____Partner name_____
Street_____X St?_____City_____Zip_____
Caller name/number if different from client_____
Cities: **5**- [YOUR TARGET AREAS] **4**-[SECOND TIER AREAS] **3 and below** – [UNDESIREABLE AREAS] *Score*_____
Work Phone _____❒ Home Phone_____❒
Cell (if offered)_____❒*(check the best daytime number)* E-mail_____

Lead source:
Can you tell me who referred you to [YOUR COMPANY]?_____
❒Former client-5 ❒Client referral-5 ❒Class/Seminar-4 ❒Architect/designer-3 ❒Article about Co.-2
❒TC/Supplier-2 ❒Direct mail-1 ❒Realtor-1 ❒Newsletter-1 ❒ Job/vehicle sign-1
❒Internet-1 [***How did you get to our site?***]_____❒Other-1_____*Score*_____
[If you know the referrer, use as a bonding technique, ie ,"Oh, she's a really nice person!" or "Yes, we remodeled their kitchen"]

Project information:
Could you tell me about the work you'd like done? What's wrong with your home? [Pain- flip sheet]

❒Kitchen-5	❒Basement-5	❒Windows/Doors-3
❒Bath-5	❒Deck-4	❒Drainage-3
❒MBR suite-5	❒Porch/Entry/Stairs-4	❒New Home-3
❒Addition-5	❒Seismic-4	❒Handyman-2
❒Whole house remodel-5	❒Inter./Exter. rehab-3	❒Other_____1-3

*Score*_____

Have you remodeled before?_____ (N-1/Y-5) If yes, what was that like?_____*Score*_____
Have you spoken to any other professionals? [contractors/architects, etc.]_____(N-5/Y-1-4) *Score*_____
What are you looking for in a contractor? [note comments/check as appropriate] ❒Quality-5 ❒Trust-5 ❒Price-1 *Score*_____
How long have you lived there?_____(6+=5) How long do you plan to stay in your home?_____*Score*_____
What is the age of your home?_____What is the style of your home?
How long have you been planning this project?_____(6+ mo=5/1.5 yr+or -6 mo=1) *Score*_____
What is your ideal start date?_____(Real-5/Unreal-1) *Score*_____
Why are you thinking about doing this project?[pain again- flip sheet]_____ ☛
Are you trying to stay within a particular investment amount?_____(Real-5/Unreal-1) *Score*_____
"I'm asking because some people who call us are on a tight budget and others who call are comfortable spending whatever it takes because it's more about them being happy. I'm just trying to get a feel about where you fit." If they are reluctant to give a number say, "Let me write down that you're uncomfortable sharing your budget."

_____ **TOTAL:** ☐

Someone from our office will give you a call back within _____[current time frame] to let you know of our availability and what the next step will be. Let me make sure I've got your name and phone number correctly. [Read back] ***If your gut is a good lead, refer caller to website[YOUR ADDRESS HERE].*** Thanks again for calling! **OVER➜**
[Put any comments you have about the caller or that the caller said beyond the above info. on the back .]

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