

The Greeting

“Thank you for calling (Company Name), this is (Your Name), how can I help you?”

Contact Information

First & Last Name: _____

Phone Number: _____

Email Address: _____

Business Name: _____

Business Location: _____

Meat & Potatoes

Project Type: _____

Notes: _____

Follow-Up Appointment: _____

Tasks Prior To Follow-Up: _____

The Closing

“Well, (Their Name) it looks like I have all of the information I need to get a quote together for you. If you can get the images we discussed over to us within the next hour or two, I can have your quote ready by tomorrow afternoon. Would (Follow-Up Appointment Time) work for you?”
Wait for confirmation/adjustment “Ok, great! Thanks again, (Their Name), I really appreciate your time and the opportunity to work with you on this project, I know we can do a really great job for you. I’ll talk to you at (Follow-Up Appointment Time). Have a great day!”