1113: Appointment Log

1100: All Sales Policies · https://milo.masseyservices.com/docs/1113-appointment-log-2/

Section: Sales
Subject: Appointment Log
Approved by: Tony Massey
Effective Date: June 1, 2014
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Policy Owner: Director of Administrative Training

Policy

The appointment log is used by our administrative team members to schedule all appointments for our inspectors, account managers, and managers. This log will be maintained for each team member and utilized to immediately schedule all incoming leads at the time of inquiry and creatively set appointments once created.

- All incoming leads will be documented using the service center call book. (See P&P 107: Service Center Call Book.)
- Creatively set appointments will be called in by sales team members as they are created, to be input into the appointment log and lead log as received.
- After all pertinent information has been obtained, the respective administrative team member will schedule all appointments utilizing the 1-31 appointment log.
- Every effort and attempt will be made to schedule all leads the same day they are received and at the prospective customer’s convenience.
- The information transferred from the service center call book to the appointment log is as follows:
  - Prospective Customer’s Name
  - Address
  - Phone Number

    - Email Address
    - Lead Source as defined in P&P 107: Service Center Call Book.

- After scheduling every appointment, a call will be placed to the inspector informing them of the appointment
  time and date so they can enter the information on their Daily Sales Activity Report (DSAR). (See P&P 1104: Daily Sales Activity Report.)
- The Inspector will immediately call our future customer to introduce, confirm the appointment and reassure the prospect that we can provide a solution to their inquiry.
- If the Inspector is running late, they will call the scheduled appointment to apologize and reassure that they are on the way.
- The Appointment Log must be reviewed every morning during check in to ensure all scheduled appointments have been prelisted.

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