1113: Appointment Log

Deprecated Policies · https://milo.masseyservices.com/docs/1113-appointment-log/

Section: Sales
Subject: Appointment Log
Approved by: Tony Massey
Effective Date: 1 June 2014
Last Reviewed Date: 1 June 2014
Policy Owner:

Policy

The Appointment Log is to be used by our Administrative Team Members to schedule all appointments for our Inspectors, Account Managers, and all 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 Massey Call Book.
- Creatively set appointments will be called in by sales Team Members as they get created and should be inputted 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.
- A separate Appointment Log will be maintained by Inspector/Account Manager.
- Every effort and attempt will be made to schedule all leads for the same day received and at the future customer’s convenience.
- The information transferred from the Massey Call Book to the Appointment Log is as follows:
- Future Customer’s Name
    - Address
    - Phone Number

    - Lead Source as defined in P&P 107:

- After scheduling every appointment, a page or call will be placed to the Inspector informing them of the appointment time and date so they can enter the information on their DSAR.
- 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.

Downloads

Embedded media: https://milo.masseyservices.com/wp-content/uploads/2025/09/1113-Appointment-Log.pdf

1113 Appointment LogDownload