

Phone inquiry evaluation scorecard

A phone call is often the first real conversation a prospect has with your business. Use this scorecard to check what a caller actually hears. For each moment, score it **Reliable**, **Inconsistent**, **Missed** or **N/A**, and write down what happened.

How to use it

- Call as a real prospect would — at a normal time, with a realistic question.
- Write facts first (times, words used, what was offered), then your impression.
- Test more than one call. One call is a snapshot; several show a pattern.

1. Reaching a person

- How many rings before someone answered, or how long until voicemail?
- If voicemail: was the message current, clear, and did it say when you'd hear back?
- If the call was missed: was there a callback, and how long did it take?

2. Greeting and tone

- Did the person give the business name and their own name?
- Did they sound like they had time for the caller, or rushed?
- If placed on hold: were you asked first, and how long did it last?

3. Discovery

- Did they ask what the caller needs before pitching or quoting?
- Did they ask for a name and use it?
- Did they capture contact details in case the call dropped?

4. Clear answers

- Were questions answered accurately and in plain language?
- When they didn't know, did they say so and offer to find out?
- Was pricing or availability handled honestly and without pressure?

5. Next step

- Was a specific next step offered — an appointment, a visit, a quote?
- Did the caller know exactly what happens next and when?

6. Follow-through

- If a callback, email or text was promised, did it arrive on time?
- Did it reference the actual conversation, or was it generic?

Reading the results

Patterns matter more than any single score. A business that answers fast but never offers a next step has a different fix than one that misses calls entirely. Start coaching with the moment that most often ends the conversation.