

Make a contact with a client by phone

Date of phone call ____/____/____

Location _____

Company name _____

First and Last name _____

Contact info _____

Client's answers to your questions (see Greeting and questions to identify needs by phone)

Answer 1 _____

Answer 2 _____

Answer 3 _____

Answer 4 _____

Answer 5 _____

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Answer 6 _____

Answer 7 _____

Date and place of an appointment / giving a presentation _____

CONCLUSIONS

Identified customer needs:

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

7 _____

8 _____

9 _____

Your opinion:

The client is useful to you, because:

1 _____

2 _____

3 _____

The client is not useful to you, because:

1 _____

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-
- 2 _____
 - 3 _____

The client's opinion:

You are useful to the client, because:

- 1 _____
- 2 _____
- 3 _____

You are not useful to the client, because:

- 1 _____
- 2 _____
- 3 _____

Read an article: <https://sergeybure.com/blog/how-to-speak-to-clients-on-the-phone>