**PERSONAL DETAILS FORM**

Full Name:

Postal Address:

City:

Postcode:

Email:

Telephone Contact:

Date of initial telephone contact:

Preferred method to receive exploratory meeting info pack (2.2):

Email or Post

**RECOMMENDED BY**

Name:

Other Details:

**MAIN REASON FOR CONTACT**

**INITIAL ASSESSMENT OF CALLER**

Does the caller’s needs appear to fit the advice and service we offer?

*Rate from 1 (does not fit) to 10 (perfect fit)*\_\_\_\_\_\_

Does the person/business who recommended the caller have a good record of recommending clients that fit with our business?

*If so, rate from 1 (very poor record) to 10 (exceptional record)*\_\_\_\_\_\_

Is the caller’s manner and personality an ideal fit with our business?

*Rate from 1 (does not fit) to 10 (perfect fit)* \_\_\_\_\_\_

Are there any other factors learned in the telephone contact that would indicate the client is a good fit (or not) with our business?

*Rate from 1 (does not fit) to 10 (perfect fit)*\_\_\_\_\_\_

Comments:

**PLEASE NOTE:**

***In the above assessment if ‘rating’ totals less than 19 points the caller should be referred to an appropriate advice partner. If ‘rating’ total is 20 points or more, the team member can continue with initial telephone enquiry checklist.***

**INTERNAL INFORMATION**

Senior Adviser:

Meeting date/time agreed:

* Adviser diary completed
* Meeting room reserved
* Client information pack forwarded by Email or Post on (date):
* Name of person(s) (and relationship to caller) also attending exploratory meeting: