TOOL 2.1.2: Personal details form for initial telephone enquiry | Making contact
PURPOSE: This data collection form is for team members engaging in initial telephone enquiry to record basic information about the caller (this can then be uploaded electronically).
**Business tool for internal use only (not for client use/view)*

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

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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.

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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: