Tool 05: Inquiry-handling review

This tool combines the 7-day missed-call log, the call-quality tally, speed to callback and form follow-up.

Purpose

Find out what happens to the calls and forms you already get. Leak 4 (Called, but lost) and leak 5 (Wrong calls). Chapters 9 and 10. It also helps with "can't tell" (chapter 3).

Inputs

- Your phone system's call log (carrier app, office phone, or call-tracking report).
- Your form and email inbox.
- A sheet on the office desk, or a shared spreadsheet.
- Seven ordinary working days. Not a holiday week.

Steps

A. Missed-call log (7 days)

1. Each day, list every missed call: time, number, whether a voicemail was left, when you called back, what it turned out to be.
2. Mark each: real new job (a returning customer's new job counts), call about a job already counted, wrong job, spam or robocall, unknown.
3. Mark whether it came in business hours or after hours.

B. Call-quality tally (same 7 days, answered calls)

4. For every answered call, one tick in one column: job you want, price shopper, out of area, wrong trade, fake or recycled lead, existing customer about a current job (a returning customer's new job is a good inquiry: tick "job you want"). Mark a price shopper only after your screening questions; a first question about price alone goes in a separate "price asked" note.
5. Note the source if you know it ("How did you hear about us?").

C. Speed to callback

6. For each missed call that was a real job, write the minutes between the call and your callback.

D. Form follow-up

7. For every form or online request, write when it arrived and when someone first replied.
8. Note whether anyone tried a second time if the homeowner didn't answer.

Missed-call record

Date and time	Number	Voicemail?	Business hours or after	Called back when	Reached?	Real new job, job already counted, wrong job, spam or unknown

Count a missed opportunity once per person and job; a miss you called back and reached is recovered.

Call-quality tally (one tick per answered call)

Day	Job you want	Price shopper	Price asked	Out of area	Wrong trade	Fake or recycled lead	Existing customer	Source, if known

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How to read the result

- The owners' debate is "answer every call" against "most misses are junk". Your own log settles it for your business. Count the missed calls that were real jobs.
- Multiply the unique, real new-job inquiries you missed and didn't recover by your booking rate, your close rate and what you keep per job after direct job costs (the owner's math in chapter 9) to put a dollar range on it. Use your numbers, not ours.
- If after-hours misses are a large share of real jobs, compare options in chapter 9: an office person, an answering service, an AI receptionist, a callback window, text-back.
- If the tally is heavy on price shoppers or out-of-area calls, the fix is upstream: tool 06 and chapter 10. Whether to keep a paid source is chapter 17's cost-per-booked-job decision, not the share of bad calls alone.
- If forms wait more than a day for a first reply, that's a gap you can close without spending anything.

Limits

- Seven days is a sample. Repeat the log once before your busy season and once before your slow season.
- Unknown numbers that never call back can't be classified. Keep them as "unknown"; don't guess.
- The published answer rates in chapter 9 come from vendors' own customers or campaigns. They show the size of the problem in general. They are not a standard your business should hit.

Next action

- Real missed jobs: chapter 9.
- Wrong-call heavy tally: tool 06 and chapter 10.
- Unknown lead sources: tool 08 and chapter 3.

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