

Inbound Call Guide

A simple guide for handling enquiries professionally, clearly and commercially.

THE PURPOSE OF EVERY CALL

Understand exactly what the customer needs, make them feel heard, collect the information needed to progress the enquiry — then agree one clear next step.

Who is doing it	What happens next	When it will happen	How we update them
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NEVER SAY “Someone will get back to you.”

THE CALL AT A GLANCE

01 Introduce yourself	02 Open the problem up	03 Repeat it back	04 Take details & recommend	05 If distance comes up	06 If they ask for samples	07 Confirm who, what, when, how
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Steps in red happen on every call. Grey steps only when the customer raises them.

01 Introduce yourself properly

Answer promptly, sound interested and take control politely.

SAY · NEW CALL

“Good morning/afternoon, Broadway Brass, **Your Name** speaking. How can I help?”

SAY · CALLBACK

“Hi, it’s **Your Name** from Broadway Brass returning your call. Sorry we missed you — how can we help with your finishing requirement?”

Then let them explain. Don't interrupt or jump straight into price.

02 Open the problem up

Understand the requirement before offering a price, answer or promise.

SAY

“Talk me through what you’re looking to have done.”

SIX THINGS TO FIND OUT

A • ITEM What is the item or component? What material is it made from, if known?	B • QUANTITY & SIZE How many items are there, and what size are they?	C • FINISH What finish? Do they have a sample, photo, drawing or reference image?
D • CONDITION What condition is it in — does it need stripping, polishing or preparation?	E • DEADLINE When do they need it completed?	F • APPROVER Who is approving the finish and price?

IF THEY ASK FOR PRICE TOO EARLY

“I can help with that. The price depends on the material, size, condition, quantity and finish, so I just need a few details first to make sure we give you the right answer.”

IF IT GETS TECHNICAL — NEVER GUESS

“Based on what you’ve described, the right next step is for us to review the details properly rather than give you the wrong answer.”

03 Repeat it back

Before recommending anything, show the customer you understand the job.

SAY • FILL IN THE BLANKS

“So, just to make sure I’ve got this right: you have **quantity** **item** made from **material**, approximately **size**, and you’re looking for **finish**. The items are currently **condition**, and you need them for **deadline**. Is that correct?”

Every blank maps to a question from step 02. If you can't fill one, go back and ask.

04 Collect details & recommend the next step

Before ending a genuine enquiry or passing it on, collect what's needed to progress it.

CHECKLIST

- ☐ Full name
- ☐ Company name and role (if a business)
- ☐ Phone number and email address
- ☐ Preferred follow-up: email, WhatsApp or callback
- ☐ Preferred contact time, if relevant
- ☐ Item location / collection or delivery postcode

HOW TO ASK

“Before I get this over to the right person, can I take your full name and the company you’re calling from?”

“What is the best email address for the photos, quote or follow-up?”

“Would you prefer us to come back to you by email, WhatsApp or a phone call?”

THEN RECOMMEND THE ACTION

“Based on what you’ve told me, the best next step is **next step**, so we can confirm the correct process, finish and price.”

TYPICAL NEXT STEPS

SEND INFO “Please send photos, dimensions and a finish reference. We’ll review them and come back with the correct route.”	WORKSHOP REVIEW “The workshop needs to review the details and confirm whether preparation, polishing and plating are needed.”	ASSESS FIRST “Because the item is large, unusual or has an existing coating, we need to assess it before confirming feasibility, timing or cost.”
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ONLY IF IT COMES UP

05 If distance comes up

Distance is not an issue. Never let “you’re too far away” end the conversation.

Nationwide We work with customers across the country.	Next-day Collection and delivery can be arranged.	Managed We handle transport around the job.
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SAY

“That’s not a problem at all — we work with customers nationwide and can arrange collection and delivery, so you do not need to be local to us.”

OR

“We regularly complete work for customers outside our local area and manage the transport around the job. If you send the job details over, we can explain the collection and delivery route alongside the quote.”

IF USEFUL · REAL EXAMPLES ONLY

“We have recently completed and delivered work to **real location** .”

Never invent customer names, projects or locations.

06 If they ask for samples or examples

Don’t offer samples by default.

ONLY OFFER WHEN THE CUSTOMER...
asks to see examples
wants reassurance on finish quality
says distance makes them unsure

**CAPTURE FIRST —
GENUINE ENQUIRIES ONLY**

Item	Finish requirement	Contact details
Delivery address		

SAY

“That makes sense — the finish is important. We can arrange free finish samples so you can see the quality and colour before deciding.”

THEN

“If you are considering the job, we can arrange the relevant free sample options. Which finish are you looking at, and where should we send them?”

07 Confirm who, what, when and how

Every call ends with all four answered out loud.

Who	What	When	How
owns it?	happens next?	will it happen?	will we contact you?
"I'll log this for the workshop team to review."	"You'll email photos, sizes and the finish reference; we'll assess the process and quote route."	"We'll come back to you by 3pm tomorrow."	"Would you prefer an email, WhatsApp message or a callback?"

SAY • AGREE THE NEXT STEP

"Perfect — you'll send **photos / measurements / sample / drawing** to **email / WhatsApp** today. I'll pass it to **person / team** for review, and we'll come back to you by **specific day / time** . Would you prefer that by email, WhatsApp or a callback?"

CLOSE • REPEAT THE KEY FACTS

"This is for **item** , **quantity** , **finish** , needed by **date** . You'll send **information** , and we will **action** by **time / date** via **preferred contact method** ."

Rules to follow

Keep this page by the phone.

ALWAYS

- + Let the customer explain before questioning.
- + Ask enough to understand the job — don't interrogate them.
- + Finish with a clear action, owner, deadline and contact method.
- + Use the nationwide collection/delivery point whenever distance is raised.
- + Only discuss free samples when the customer asks for examples or needs reassurance on quality or distance.
- + Write useful notes so the customer doesn't need to repeat themselves.

NEVER

- × Promise a finish, price, turnaround or technical solution until confirmed.
- × Say "someone will get back to you."
- × End a genuine enquiry without name, contact details, company (where relevant) and preferred follow-up method.
- × Invent locations, customer names or projects — use real delivery examples only.