WHO ARE THEY?

Prospective Clients

1. Collect:
   - ✓ Full Name
   - ✓ Number
   - ✓ Where they are calling from
2. If the caller states they are/want to be a customer, transfer immediately, otherwise continue to gather information.
   - ✓ Email
   - ✓ How did you hear about us?
   - ✓ Reason for the call
3. Attempt a transfer to **(EMPLOYEE)**. If unavailable, take a message.

Existing Clients

1. Collect:
   - ✓ Name
   - ✓ Verify number
   - ✓ Reason for the call
   - ✓ Where they are calling from
2. Attempt a transfer to **(EMPLOYEE)**.If unavailable, take a message.

Sales

Review NOTES > Known Partnerships to see if they are on the list. If they are, follow Technical Relationship Calls instead

1. Collect:
   - ✓ Name
   - ✓ Number
   - ✓ Reason for the call
2. Transfer to voicemail
3. Mark as incomplete/did not speak to caller

Service Calls
1. Collect:
   - ✓ Name
   - ✓ Number
   - ✓ Reason for the call
2. Attempt a transfer to **(EMPLOYEE)**. If unavailable, take a message.

All Other Calls

Review NOTES > Known Partnerships to see if they are on the list. If they are, follow Technical Relationship Calls instead
1. Collect:
   - ✓ Name
   - ✓ Number
   - ✓ Reason for the call
2. Take a message

Technical Relationship Calls

Review NOTES > Known Partnerships to see if they are on the list. If they are, continue with these instructions. If not, see All Other calls or Sales
1. Collect:
   - ✓ Name
   - ✓ Number
   - ✓ Reason for the call
2. Attempt a transfer to **(EMPLOYEE)**. If unavailable, take a message.

NOTES

About us

IT Solutions
Managed IT • Data Protection and Backup • Cyber Security • Networking
Network Security • Hosting and Cloud • Applications • Mobile Device Management
It Procurement • Virtual CIO/CTO
Handle any callers from outside of these areas as normal. They will follow up accordingly

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Service Areas

List the counties/areas that you service.

Handle any callers from outside of these areas as normal. They will follow up accordingly

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Employees

List any employees

Consultations

All initial consultations are free

Known Partnerships

If this list is different, please let us know!
Treat as Technical Relationship Calls:
We have partnerships with the following providers:
Barracuda
Comcast - Mark Merritt
Datto / Autotask
Continuum
Barracuda / Intronis
Dell
Egnyte
Intermedia
Net2Phone
ConnectMeVoice / CMV
Telarus
Amazon Business
Ubiquiti
Microsoft
Intuit / QuickBooks / T-Sheets
Ingram Micro
EthosIq