

Phone Policy

- [Phone Call Handling \(Quo\)](#)
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Phone Call Handling (Quo)

Team Roles

- **Clara** (Call Catcher): answers, triages, logs, routes, schedules callbacks
- **Jake** (Ops + Sales Intake): qualifies new projects, schedules, handles ops + most sales calls, basic data/tool guidance
- **Sam** (Data Technician): deliverables/tech support, data questions, access issues, formats
- **Jared** (Owner/Expert): escalation only (complex scoping, big \$\$, surveyor/engineer-level nuance, relationship saves)

1) Primary Goals (every call)

1. **Answer quickly** (live answer preferred)
2. **Identify caller + intent in 10 seconds**
3. **Route to the right owner**
4. **If not answered → capture + scheduled callback (never “lost”)**

2) Standard Greeting + 10-Second Triage (Clara uses every time)

Greeting:

“Howdy! Texas Drone Company, this is Clara. How can we help you?”

Triage Question:

“Is this about a new project or an existing project?”

If New:

“Great — if you can tell me what are you trying to accomplish, I can route you to the best person.”
(then route per Section 3)

If Existing:

“Got it — is this about scheduling, deliverables/data, or billing/admin?” (then route)

Always capture before transferring:

“Best callback number and email in case we get disconnected?”

3) Routing Matrix (Who gets the call)

A) New Project / Exploratory Sales

Examples: “Do you do LiDAR?”, “Need a topo”, “Need progress photos”, “Need stockpile volumes”

☐ **Route to Jake (Primary)**

Escalate to Jared only if: engineer/surveyor-level specs, unusual constraints, large opportunity, pricing exception.

B) Existing Project — Scheduling / Changes / Field Ops

Examples: reschedule flight, access issues, site coordination, weather timing

☐ **Route to Jake (Primary)**

C) Existing Project — Deliverables / Data / Tech Support

Examples: can't open link, missing files, format requests, coordinate system questions, revisions to exports

☐ **Route to Sam (Primary)**

Backup: Jake if Sam unavailable

Escalate to Jared only if: dispute risk, major scope change, or technical decision impacts contract/pricing.

D) Billing / Admin

Examples: invoice, payment, W-9, COI, vendor calls, recruiting

☐ **Route to Sam (Primary)**

Backup: Jake if urgent payment needed

E) Sales Partners / High-Value Relationship Calls

Examples: survey firm partnership, enterprise client, sensitive negotiation

☐ **Route to Jake first (screen) → Jared if needed**

F) Spam / Solicitors

☐ Clara filters quickly; do not transfer.

4) Transfer Rules (Clara)

- **Warm transfer** whenever possible:

“I’m going to connect you with Jake — he handles new project scoping. One moment.”

- If the destination doesn't answer: **do not bounce the caller around.**

Offer a callback: “Jake’s tied up — I can have him call you back when it's convenient for you. What’s a good time?”

5) Voicemail / Missed Call Standard (use same wording)

“Howdy! Thanks for calling Texas Drone Company. Please leave your **name, company, jobsite city**, what you need help with, and your **best callback number**. If this is an existing project, mention the **project name**.”

Clara logs the voicemail and routes it within **15 minutes** during business hours.

6) Minimum Call Log (Clara records every inbound)

Log fields (CRM or sheet):

- Date/Time
- Caller name + company
- Phone + email
- New vs Existing
- Category (Sales / Ops / Deliverables / Billing / Vendor)
- Routed to (Jake/Sam/Clara/Jared)
- Outcome (answered / voicemail / callback scheduled)

7) Escalation to Jared — Only When...

- Engineer/surveyor is asking for specific deliverables/accuracy/datum and it affects scope
- Opportunity is **high value** or strategic partner
- **Conflict/dispute** risk
- Pricing exception / custom terms needed

Anything that “feels like a landmine”

Phone Hours

Official Business Hours - 8:30am - 5:30pm

Phone Hours are 1hr BEFORE and 1hr AFTER the above hours.

Every morning, Clara will check the overnight messages and send the message (via email) to the person responsible. This will happen at 9am.

7:30am - 8:00am - Jared

8:00am - 9:00am - Jake

9:00am - 12:00pm - Clara

Floating Lunch - Jake

1:00pm - 5:00pm - Clara

5:00pm - 6:30pm - Jared