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"

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