



Initial Call Checklist

Greeting

- This is _____ from _____
- How may I help you?

Points to Ask About Their Business

- Can you tell me a little about your business?
- What are your current services?
- What do you sell them for?

Points to Ask About Their Current Marketing

- Do you currently have any marketing campaigns running?
- How are those performing?
- What is the ROI on each campaign?
- Have you tried anything in the past that worked or didn't work?

Ask Them What They Want to Accomplish

- What is your main objective – what are you looking to do?
- Do you have current measurable processes in place?
- Tracking?
- May we perform a full market analysis?