

# Customer Inquiry

Name		Primary Phone Number	
Address		Secondary Phone Number	
Email			
<p><b>Current Customer:</b></p> <input type="checkbox"/> Yes - Service Agreement Customer <input type="checkbox"/> Yes <input type="checkbox"/> No		<p><b>Number of Systems:</b></p> <input type="checkbox"/> One System <input type="checkbox"/> Two or More Systems	
<p><b>Reason for Inquiry:</b></p> <input type="checkbox"/> Service Work <input type="checkbox"/> Service Agreement <input type="checkbox"/> IAQ Improvement <input type="checkbox"/> Comfort Issues <input type="checkbox"/> Reduce Energy Costs <input type="checkbox"/> Replace Old System <input type="checkbox"/> Add Air Conditioning <input type="checkbox"/> Other: _____ _____		<p><b>Type:</b></p> <input type="checkbox"/> Packaged Unit <input type="checkbox"/> Straight Air Conditioner <input type="checkbox"/> Heat Pump <input type="checkbox"/> Evaporative Cooler <input type="checkbox"/> Window Units <input type="checkbox"/> Furnace <input type="checkbox"/> Boiler	
<p><b>Age of Cooling System:</b></p> <input type="checkbox"/> Less than 5 years <input type="checkbox"/> 5 to 10 years <input type="checkbox"/> 11 to 15 years <input type="checkbox"/> Older than 15 years		<p><b>Heating Fuel:</b></p> <input type="checkbox"/> Gas <input type="checkbox"/> Electric <input type="checkbox"/> Propane <input type="checkbox"/> Oil	
<p><b>Age of Heating System:</b></p> <input type="checkbox"/> Less than 10 years <input type="checkbox"/> 10 to 15 years <input type="checkbox"/> 16 to 20 years <input type="checkbox"/> Older than 20 years		<p><b>Size of Home:</b></p> <input type="checkbox"/> Less than 1500 SF <input type="checkbox"/> 1500 to 2500 SF <input type="checkbox"/> More than 2500 SF	
		<p><b>Need:</b></p> <input type="checkbox"/> Immediate <input type="checkbox"/> Within 3 Months <input type="checkbox"/> 3 to 6 Months <input type="checkbox"/> Longer	

H  
W  
L  
C

Use Back For Notes

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Notes:

At a home show or other marketing event, you want to collect information from visitors to your booth as part of the lead generation process. Because of the pace at a home show, data collection needs to be quick and simple.

This form is designed to use check boxes to speed things along. To use it, casually ask the homeowner if you can collect a little information and then quickly run down the checklist.

Next to the contact information at the top, the most important data is the notes you will take at the back. Whoever completes the form should initial it. At the end of each day, everyone who worked the show should review their notes on lead sheets and clarify the notes if unclear or difficult to read.

On the front, you will note a box with the letters H, W, L, and C. These indicate the status of the leads. H = hot. W = warm. L = lukewarm. C = Cold.

Hot leads are excited and ready to buy now. Cold leads, by contrast, are unlikely to buy anytime soon. Warm and lukewarm are gradients in between. After the prospect leaves, circle the appropriate letter.

The form is designed for 5-1/2" X 8-1/2" (i.e., half a sheet of copy paper). Get these printed at a local printer and glued into pads of 25 sheets. Bring a number to each home show.