How we rate calls from new customers

The standard every call from a new customer is judged against, how the New Customer Score in Gorilla Dash applies it, and how managers use recorded calls to train their team.

A phone call from a new customer is the last step in a long and expensive chain. Before that phone rang, the business paid for Google Ads, search engine optimisation, directory listings, social media, signage and a website, all of it aimed at making one person pick up the phone and call. The call is the moment where that spend either turns into a job or is thrown away, and the difference is entirely in how the call is handled.

If you want to know what each call is worth, take what your tribe spent on advertising last month and divide it by the number of new-customer leads it produced, counting both website enquiries and phone calls. That figure is what every lead cost before anyone answered it, and a call is simply a lead that chose to ring rather than fill in a form. A call that ends with "can you ring back in ten minutes" has spent that money and bought nothing, because most callers ring the next business on the list instead.

This guide sets out the standard we rate every new-customer call against. It applies to everyone who might answer the phone, not only the sales representative. A **tribe** is one location, branch or business unit inside your organisation, and in most tribes the phone is answered by whoever is nearest to it.

> **WHERE THE SCORE LIVES**
> Gorilla Dash scores every recorded new-customer call against this standard. The **New Customer Score** appears beside each call under **Calls** in Call Tracking and as a tribe average on the **Calls Dashboard**. The section near the end of this guide explains how the score is worked out.

The standard

The points below follow the order of a typical call, from picking up the phone to writing down what happens next. Each one is something the caller notices, and each one is something the score measures.

1. Introduce yourself and ask who is calling

Answer with the name of the business and your own name, then ask for the caller's name and the business they are calling from. Use their name during the call. This sounds obvious, but a surprising number of calls end without the business ever learning who rang, and a caller who has not been asked their name has been told, without anyone meaning to, that the call does not matter much.

Asking for the business name early also tells you what kind of customer you are talking to, which changes how you handle the rest of the call.

2. Be in the zone

While you are on the phone, what is happening on the phone is one hundred per cent of your focus. Stop what you were doing, step away from the noise if you can, and do not type, serve a walk-in or talk to a colleague at the same time. Callers can hear when they only have half of your attention, and they respond by giving you half of theirs.

If you genuinely cannot give the call your attention at that moment, ask the caller whether you can put them on hold for a minute, and say why. Never leave someone on hold without asking, and never transfer a call without telling the caller who they are about to speak to.

3. Never ask a customer to call back

This is the rule that costs the most when it is broken. If you are production staff answering the phone while the sales representative is out, do not ask the customer to ring back in ten minutes, and do not tell them the person they need is not available and leave it there. Take their details, answer as much as you can, and have a conversation with them.

You know as much about what the business does as the sales representative does. You know the products, roughly how long things take, and what the customer will need to supply. That is most of what a new caller wants to hear. What the sales representative adds is the quote, and that can follow once you have written down what the customer needs.

> **THE CALLBACK THAT NEVER COMES**
> When a caller is asked to ring back, the business has handed the next move to a stranger who has a list of competitors open in front of them. Gorilla Dash records this as a separate call outcome, "Responder Asked Customer To Call Back", and it does not give the call a New Customer Score at all, because there was no opportunity left to score. Take the details and promise the call back yourself, with a time.

4. Find out what the customer actually wants

Get a clear understanding of what the caller is trying to achieve before you start describing what you sell. Ask questions, and then listen to the answers. What is it for? Where will it go? When do they need it? Have they done this before, or is it new to them? Is there a budget in mind? A call where the business talks for three minutes about its options and never learns why the customer rang has not moved anywhere.

Repeat the request back in your own words once you think you have it: "So you need two signs for the front of the new office, ready before the opening on the fourteenth." If you have it wrong, the caller will correct you now rather than when the quote arrives.

5. Give real information

Answer what was asked with specific, accurate detail about the product, the process and the timing. If the caller asks about price, give them something to work with, such as a typical range for that kind of job and what pushes it up or down, rather than refusing to discuss it until someone has seen the site. A caller who gets a straight answer trusts the quote that follows; a caller who is stonewalled on price assumes the worst and keeps ringing around.

If you do not know the answer to something, say so, and say how and when they will get it. "I am not sure whether that finish works outdoors, but I will check with Sam and call you back by lunchtime" is a perfectly good answer. "I don't know" on its own is not.

6. Take their details and read them back

Before the call ends you need the caller's full name, the business name where there is one, the best phone number to reach them on, and an email address. Read the phone number and the email back to them letter by letter, because a quote sent to a mistyped address is a lead lost just as surely as one that was never written down.

While you have them, ask how they found you. Whether it was a Google search, a referral, a sign on a van or a directory listing, the answer tells the business which of its advertising is actually making the phone ring, and it takes five seconds to ask.

7. Agree concrete next steps and confirm them

Every call should end with the caller knowing exactly what happens next, who will do it and when. A quote by email by the end of the day, an appointment booked for Thursday at ten, an order placed on the spot, or a call back from the sales representative before four this afternoon. "Have a think and let us know" is not a next step; it is a polite way of ending the relationship.

Say the next step out loud before you hang up, so the caller hears it and agrees to it: "I will send the quote to that address by five today, and if I have not heard back by Monday I will give you a call." Where it makes sense, ask for the job. Invite them in to see samples, ask them to send the artwork through, or offer to book the installation date now.

8. Write it down in the CRM and set a follow-up task

Do this the moment the call ends, while the detail is fresh. Open the contact in the CRM, or create one if the caller is new, and record what they asked for, what you told them, and what was agreed. Then create a task for the follow-up with a due date matching what you promised the caller. If the sales representative is the one who needs to act, assign the task to them so it appears in their list.

A note that says "wants signage, will call back" is nearly useless to the person who picks it up. Write the note so that a colleague who never heard the call could ring the customer and carry on the conversation: what the job is, the sizes and quantities mentioned, the deadline, the price range you discussed, and how they found you.

> **IF IT IS NOT IN THE CRM, IT DID NOT HAPPEN**
> Details written on a notepad by the phone are lost the moment the page is turned or the person who wrote them goes home. The CRM is the only place the rest of the team can see the lead, the only place a follow-up task will remind anyone, and the only place the business can later see how many of its calls turned into work.

9. Follow up when you said you would

The standard does not end when the phone goes down. The quote that was promised by five needs to go by five, and the Monday call needs to happen on Monday. The follow-up task in the CRM exists so that this happens even on a busy day. If the customer has not replied, ring them; do not send a second email and wait. Most quotes that are never chased are never accepted.

How the New Customer Score works

When a call is recorded and reviewed, Gorilla Dash reads the transcript and gives each genuine new-customer call a score from 1 to 10. It judges only how well the opportunity was handled, on three things weighted equally.

What is judged	What it means	Points in the standard
Information given	Did the responder answer what was asked, with accurate and specific detail about products, services, pricing or process?	4 and 5

Details taken	Did the responder capture the caller's name, contact number or email, business name, and what they actually need?	1 and 6
Solution provided	Did the caller leave with a resolution or a concrete next step: a quote to follow, an appointment booked, an order placed, or a call back committed with a time?	3, 7 and 8

The score uses the whole range, and most ordinary calls land between 5 and 8. A 9 or 10 is reserved for a call where nothing was missed.

Score	What it looks like
10	Flawless. Every question answered, full details captured, a firm next step agreed and confirmed back to the caller.
8 to 9	Strong on all three, with one small omission, such as a detail not taken or a next step agreed but not confirmed.
6 to 7	Competent. The enquiry was answered and something was captured, but one of the three was clearly weak.
4 to 5	Two of the three were weak. The caller got an answer but no details were taken and no next step was set.
2 to 3	Poor. Vague or unhelpful information, nothing captured, and the caller left to chase the business themselves.
1	The opportunity was actively lost: dismissive, rude, refused to help, or sent the caller elsewhere with no reason.

On screen the score is drawn as a small meter. Below 4 it is red, from 4 to 6 it is amber, and 7 or above is green. On the Calls Dashboard the same meter shows each tribe's average over the selected period, with the number of scored calls beside it.

Not every call is scored, and a call with no score is not a bad call. Existing customers are never scored, because the standard is about winning new work. Calls that were not answered, went to voicemail, were abandoned, or ended with the caller being asked to ring back are not scored either, because there was no conversation to judge. Wrong numbers, suppliers, telemarketers, job applicants and internal calls are left out for the same reason. When Gorilla Dash is unsure, it leaves the call unscored rather than guess, so the average only ever reflects real opportunities.

For managers: review the calls and train the team

The score is a measurement, not a training programme. The training happens when a manager sits with the team and listens to real calls, and Gorilla Dash keeps every recording, transcript and review in one place so that this takes minutes rather than an afternoon.

Set aside a regular time every week to do the following.

1. Open **Call Tracking** in Gorilla Dash and select **Calls**. Filter to the last week and sort by New Customer Score so the weakest calls are at the top.
2. For each call you want to look at, play the recording, read the transcript, and open the review. The review names who answered, whether the caller's details were taken, what the caller wanted, and whether it was resolved, so you can see at a glance which part of the standard was missed.
3. Pick two or three calls per person who answers the phone: at least one that was handled well and one that was not. The good call is as important as the weak one, because it shows the team what the

standard sounds like in their own voice.

4. Go through them together at the team meeting. Play the call, ask the person who took it what they would do differently, and point to the specific line in the standard. Keep it about the call, not the person.
5. Check that the details from each scored call are in the CRM with a follow-up task. A well-handled call whose lead was never written down is still a lost lead.
6. Watch the tribe average on the **Calls Dashboard** from week to week. It should move upward as the team gets used to the standard, and a drop usually means a new person has started answering the phone without having read this guide.

Remember that in most tribes the phone is answered by production staff, reception and whoever is passing, not only by the sales representative. Everyone who could pick up the phone needs to know the standard, and everyone who does pick it up will appear in the call list.

> **MAKING THE COST VISIBLE**
> When you discuss a weak call with the team, put the cost beside it. Divide the month's advertising spend by the website enquiries and calls it produced to get the price of one lead, then add what the job would have been worth. A caller who was told to ring back later did not cost nothing; they cost the advertising that brought them and the job that went to a competitor. Nobody who has done that arithmetic once asks a customer to call back again.