PRE-SALES TELECALLER

JD + SOPs + Policies + Registers + Formats

Universal pre-sales telecalling playbook for Swara HO (1) + Sales Offices | Real Estate + Redevelopment

Use: This playbook defines how the Pre-Sales Telecaller runs end-to-end enquiry intake, first response, lead qualification, site visit booking, warm handover, follow-up ageing, CRM update and telecalling reporting discipline. It is designed to align with Swara's Sales hierarchy, authority principles and customer communication discipline. If any conflict arises, the Company Authority & Escalation Matrix prevails.

PRE-TC Outputs (Must)	Evidence / File Location (suggested)
PRE-TC Role JD (responsibilities, rhythm, KPIs)	00_Admin & Governance / HR-JDs / Sales
Authority Snapshot + Escalation Quick TAT	00_Admin & Governance / Control Framework / Sales
SOPs (PRE-SOP-01 to PRE-SOP-12) - in-depth	00_Admin & Governance / SOPs / Sales / Pre-Sales
Policies (PRE-POL-01 to PRE-POL-10) - in-depth	00_Admin & Governance / Policies / Sales / Pre-Sales
Registers (PRE-REG-01 to PRE-REG-12) - printable templates	08_Sales & CRM / Registers / PreSales
Formats/Templates (PRE-FMT-01 to PRE-FMT-10) - printable templates	08_Sales & CRM / Formats / PreSales
Lead Funnel Map + 30-60-90 onboarding plan	00_Admin & Governance / Playbooks / Sales
Pre-Sales Audit Scorecard	08_Sales & CRM / Audits / PreSales

A) Playbook Index (Codes and Quick Map)

All items are coded for easy reference. Use these codes in emails, review notes, minutes and escalation messages.

A.1 SOP Index

Code	SOP Name	Primary Funnel Stage	Key Registers
PRE-SOP-01	Lead Intake, Source Tagging & Duplicate Control	Intake	PRE-REG-01, PRE-REG-11
PRE-SOP-02	First Response / Callback TAT Control	Intake	PRE-REG-02, PRE-REG-10
PRE-SOP-03	Lead Qualification & Need Discovery	Qualification	PRE-REG-01, PRE-FMT-01
PRE-SOP-04	Site Visit / Meeting Booking & Confirmation	Conversion	PRE-REG-04, PRE-FMT-03
PRE-SOP-05	Warm Lead Handover to Sales Team	Conversion	PRE-REG-05, PRE-FMT-02
PRE-SOP-06	Follow-up Cadence, Ageing & Revisit Control	Pipeline	PRE-REG-03, PRE-REG-06
PRE-SOP-07	CRM / Lead System Update Discipline	Pipeline	PRE-REG-01, PRE-REG-12
PRE-SOP-08	Objection Handling & Sensitive Lead Escalation	Escalation	PRE-REG-10, PRE-FMT-06
PRE-SOP-09	Daily Telecalling Summary & Reporting	Reporting	PRE-REG-07, PRE-FMT-04
PRE-SOP-10	Source Quality Review & Campaign Feedback	Review	PRE-REG-08, PRE-FMT-08
PRE-SOP-11	Stale Lead Cleanup, Closure & Reactivation	Pipeline Hygiene	PRE-REG-06, PRE-FMT-05
PRE-SOP-12	Data Privacy, Number Usage & Calling Conduct	Governance	PRE-REG-09

A.2 Policy Index

Code	Policy Name	Applies To
PRE-POL-01	No False Commitment Policy	All stages
PRE-POL-02	Lead TAT & Callback Discipline Policy	Intake / follow-up
PRE-POL-03	CRM Data Integrity Policy	All stages
PRE-POL-04	Lead Ownership & Handover Policy	Qualification / handover
PRE-POL-05	Customer Data Privacy & Number Use Policy	All stages
PRE-POL-06	Visit Booking & Confirmation Policy	Site visit / meeting stage
PRE-POL-07	Hot / Angry / Sensitive Lead Escalation Policy	Escalations
PRE-POL-08	Call Quality & Conduct Policy	Daily calling
PRE-POL-09	Source Feedback & Stale Lead Hygiene Policy	Weekly/monthly review
PRE-POL-10	Reporting & Daily Summary Policy	Daily / weekly reporting

A.3 Register Index

Code	Register Name
PRE-REG-01	Lead Master Register
PRE-REG-02	Daily Call Log
PRE-REG-03	Follow-up Ageing Tracker
PRE-REG-04	Site Visit / Meeting Booking Tracker
PRE-REG-05	Warm Lead Handover Register
PRE-REG-06	Lead Closure / Invalid / No-Response Register
PRE-REG-07	Daily Telecalling Dashboard Register
PRE-REG-08	Source-wise Lead Quality Review Register
PRE-REG-09	Call Quality / Script Review Register
PRE-REG-10	Sensitive Lead / Escalation Register
PRE-REG-11	Lead Source Duplicate & Correction Log
PRE-REG-12	CRM Data Audit Register

A.4 Format / Template Index

Code	Format / Template Name
PRE-FMT-01	First Call Qualification Sheet
PRE-FMT-02	Warm Lead Handover Note
PRE-FMT-03	Site Visit Confirmation Message Template
PRE-FMT-04	Daily Telecalling Summary Sheet
PRE-FMT-05	Lead Closure Reason Sheet
PRE-FMT-06	Sensitive / Hot Lead Escalation Note
PRE-FMT-07	Callback / Revisit Reminder Template
PRE-FMT-08	Weekly Source Quality Review Note
PRE-FMT-09	No-Response Reactivation List
PRE-FMT-10	Script Coaching Review Sheet

B) Role JD - Pre-Sales Telecaller (PRE-TC)

Field	Details
Role Code	PRE-TC (Proposed)
Role Title	Pre-Sales Telecaller / Telecalling Executive
Grade / Level	L1 / L2 (recommended)
Reports To	SAL-M (Sales Manager)
Functional Stakeholders	SAL-H, Sales Executives, CRM team, HR, Admin
Primary Objective	Generate, qualify and discipline incoming / outgoing pre-sales leads so the sales team receives warmer, cleaner and more conversion-ready opportunities.
Coverage	HO / sales office / project sales office | enquiry intake to warm handover and follow-up ageing control
Core Tools	CRM / lead system, Excel trackers, call logs, WhatsApp Business / official number, appointment calendar

Key Outputs (What PRE-TC must deliver)

- Daily call log and lead status update
- Qualified lead handover list to Sales Manager / Sales Executive
- Site visit / meeting booking tracker
- Callback ageing tracker and stale lead cleanup
- Sensitive lead escalation notes
- Daily / weekly pre-sales dashboard

Daily / Weekly / Monthly Rhythm (Non-negotiable)

Daily:

- Check fresh leads, missed calls and pending callbacks at opening time.
- Close first-response / missed-call callback TAT as per company discipline.
- Run outbound follow-up blocks for warm, revisit and pending leads.
- Fix site visits / meetings and reconfirm already-booked appointments.
- Update CRM and send end-of-day telecalling summary to SAL-M.

Weekly:

- Review source-wise lead quality and follow-up ageing.
- Review visit show-up vs no-show trend.
- Clean duplicates, stale leads and weak-data records.
- Review objections / conversion bottlenecks with SAL-M.

Monthly:

- Review source performance and script improvement areas.
- Review qualified lead to visit ratio and visit to sales handover ratio.
- Refresh scripts and common objection handling discipline.

KPIs (Measure performance objectively)

- First-call / callback TAT
- Connected calls per day
- Qualified leads per week
- Site visits booked and show-up ratio
- Warm lead handover quality
- CRM update accuracy and stale lead control

Recommended Org Placement Note

Current Swara structure already has **SAL-H -> SAL-M -> Sales Executives** and a separate **CRM** function. Therefore PRE-TC should sit under **SAL-M** as a pre-sales / telecalling function so that lead intake, qualification and site visit conversion remain commercially aligned. CRM should stay separate for customer-relations / receipt / escalation discipline, but PRE-TC must coordinate with CRM / lead system hygiene where required.

C) Lead Funnel Responsibility Map (PRE-TC)

Lead Funnel Stage	PRE-TC Responsibilities	Key Outputs / Registers
Stage 0 - Lead Source Readiness	Understand source lists, campaigns, portal inflow and assigned number discipline.	PRE-REG-08, PRE-FMT-08
Stage 1 - Lead Intake	Capture every enquiry with source tag, date, time, contact and duplicate check.	PRE-REG-01, PRE-REG-11
Stage 2 - First Response	Call new / missed leads within TAT and record connected / not connected status.	PRE-REG-02, PRE-REG-07
Stage 3 - Qualification	Assess budget, purpose, project fit, timeline and decision-maker status.	PRE-FMT-01, PRE-REG-01
Stage 4 - Visit / Meeting Booking	Fix site visit / meeting with date, time, project and owner clarity.	PRE-REG-04, PRE-FMT-03
Stage 5 - Warm Handover	Transfer warm lead to sales team with concise requirement note.	PRE-REG-05, PRE-FMT-02
Stage 6 - Revisit / Follow-up	Continue disciplined follow-up for revisit, future and pending leads.	PRE-REG-03, PRE-FMT-07
Stage 7 - Sensitive Lead Escalation	Escalate hot / angry / pricing / refund / legal-sensitive lead correctly.	PRE-REG-10, PRE-FMT-06
Stage 8 - Closure / Cleanup	Mark invalid, junk, closed, no-response and reactivation buckets properly.	PRE-REG-06, PRE-FMT-05 / 09

D) Authority & Escalation Snapshot (Pre-Sales)

PRE-TC must follow Swara's written-approval, no-false-commitment and owner-based hierarchy discipline. This page is a quick operational guide for telecalling-related issues.

Non-negotiable rules

- If a price / scheme / discount / commitment is not officially approved, treat it as NOT approved.
- Do not hide hot leads or sensitive complaints.
- Do not continue vague verbal lead handling without CRM / tracker update.
- Escalation must include lead name, project, source, issue, action taken and support required.

Authority quick guide (most common situations)

Decision / Situation	Initiate	Review / Recommend	Approve	Execute
New lead intake / source tagging	PRE-TC	SAL-M	SAL-M	PRE-TC
Visit booking / visit confirmation	PRE-TC	SAL-M	SAL-M	PRE-TC
Warm lead handover to sales	PRE-TC	SAL-M	SAL-M	PRE-TC / SAL-EX
Pricing / discount / scheme query	PRE-TC	SAL-M / SAL-H	As per sales matrix	SAL-M / Sales owner
Refund / cancellation / possession complaint	PRE-TC (flags only)	CRM + ACC-H + PM-HO	As per company matrix	CRM / ACC-H
Sensitive angry lead / legal threat	PRE-TC	SAL-M / CRM	PM-HO if escalated	Concerned owner

Escalation quick TAT

Issue Category	Trigger / Threshold	Level 1	Level 2	Level 3
Hot lead	Lead clearly ready for immediate commercial response / visit / closure	PRE-TC -> SAL-M (immediate)	SAL-M -> SAL-H (same working block)	PM-HO if special exception
Missed-call / new lead backlog	Callback TAT breach or system load issue	PRE-TC -> SAL-M (same block)	SAL-M reviews closure same day	SAL-H if repeated
Sensitive pricing / scheme demand	Lead demands unapproved price commitment	PRE-TC -> SAL-M (same call block)	SAL-M -> SAL-H (same day if required)	PM-HO / OWN as per sales authority
Refund / cancellation / legal-sensitive complaint	Lead/customer demands refund or threatens complaint/legal step	PRE-TC -> SAL-M / CRM (same day)	CRM -> PM-HO / ACC-H (as required)	OWN if serious / legal
Customer abuse / reputation risk	Severe anger, public escalation risk, social media threat	PRE-TC -> SAL-M (immediate)	SAL-M / CRM same day	PM-HO if high risk

Escalation message format (copy-paste)

Subject: Escalation - [Lead Category] - [Project] - [Lead Name] - [Date]
[ ] Lead summary (one line)
[ ] Source / requirement / urgency
[ ] Issue / risk / objection
[ ] Action taken so far
[ ] Support / decision required + deadline

E) SOP Library (In-depth)

SOPs are step-by-step execution procedures. Follow them exactly and record evidence in the registers.

PRE-SOP-01 - Lead Intake, Source Tagging & Duplicate Control

Registers to update	PRE-REG-01 (Lead Master), PRE-REG-11 (Duplicate & Correction Log)
Purpose	Ensure every enquiry enters the pre-sales funnel with correct source, clean identity and no duplicate confusion.

Inputs

- New enquiry from portal / website / campaign / missed call / reference / walk-in list.
- Customer name, contact number, source and project interest.
- Existing CRM / tracker access for duplicate check.

Outputs

- Lead entered in master register / CRM with source tag.
- Duplicate identified and corrected where needed.
- First status assigned: New / Callback Pending / Invalid / Duplicate.

Procedure (step-by-step)

- Record lead immediately with date, time, source, project and contact details.
- Check if the same number / name already exists in active lead list.
- If duplicate exists, do not create a blind second record; correct the source note instead.
- Assign first owner and first action time.
- No lead should remain only on paper slip / WhatsApp without system entry.

PRE-SOP-02 - First Response / Callback TAT Control

Registers to update	PRE-REG-02 (Daily Call Log), PRE-REG-07 (Daily Dashboard)
Purpose	Protect lead freshness through fast response and visible callback discipline.

Inputs

- New lead list and missed call list.
- Business-hour TAT standard.
- Available caller block / seating schedule.

Outputs

- Callback completed or attempted within TAT.
- Connected / not connected / retry status updated.
- Escalation if callback backlog builds up.

Procedure (step-by-step)

- Start every day with fresh leads and missed calls before old follow-ups.
- Call within defined TAT and mark call result clearly.
- If unanswered, set next callback timing instead of leaving status blank.
- If callback queue becomes unusually large, inform SAL-M the same day.
- Daily dashboard should show pending new leads if any.

PRE-SOP-03 - Lead Qualification & Need Discovery

Registers to update	PRE-REG-01 (Lead Master), PRE-FMT-01 (Qualification Sheet)
Purpose	Convert raw enquiries into usable sales opportunities using structured qualification questions.

Inputs

- Connected lead.
- Basic product / project knowledge.
- Qualification script and project list.

Outputs

- Lead classified as Qualified / Warm / Cold / Invalid / Future buyer.
- Budget, requirement and timeline captured.
- Next action fixed.

Procedure (step-by-step)

- Confirm location / project interest, purpose (self-use / investment), budget and purchase timeline.
- Check if the caller is decision-maker or influencer only.

- Capture configuration preference and financing sensitivity where relevant.
- Avoid long selling speech before understanding need.
- Update qualification status with meaningful remarks.

PRE-SOP-04 - Site Visit / Meeting Booking & Confirmation

Registers to update	PRE-REG-04 (Visit Booking Tracker), PRE-FMT-03 (Visit Confirmation)
Purpose	Ensure visits are booked clearly and the sales team receives informed appointments.

Inputs

- Qualified / warm lead.
- Visit slot availability.
- Assigned sales owner / project point of contact.

Outputs

- Visit booked with date, time and project clarity.
- Confirmation message issued.
- Show-up / no-show captured later.

Procedure (step-by-step)

- Lock visit only after confirming date, time, project and meeting point.
- Inform concerned sales person / manager immediately in writing.
- Send confirmation message and reminder before visit.
- Capture reschedule, no-show or attendance on same day.
- Visit log must stay current for daily review.

PRE-SOP-05 - Warm Lead Handover to Sales Team

Registers to update	PRE-REG-05 (Warm Lead Handover Register), PRE-FMT-02 (Handover Note)
Purpose	Make the handover from telecaller to sales team structured and traceable.

Inputs

- Qualified / warm lead record.
- Visit booking or strong commercial interest.
- Assigned sales owner.

Outputs

- Written handover note sent to sales owner.
- Lead owner visibility updated.
- Sales team receives a more informed lead.

Procedure (step-by-step)

- Prepare concise handover note: source, budget, timeline, project interest, objections, visit status.
- Send to SAL-M / assigned sales owner in written form.
- Mark handover date and time in tracker.
- Do not continue conflicting parallel communication after handover unless instructed.

PRE-SOP-06 - Follow-up Cadence, Ageing & Revisit Control

Registers to update	PRE-REG-03 (Ageing Tracker), PRE-REG-06 (Closure Register)
Purpose	Maintain disciplined follow-up and stop the pipeline from becoming messy.

Inputs

- Warm, revisit, no-response and future buyer leads.
- Ageing buckets and callback plan.
- Sales manager instructions for campaign pushes.

Outputs

- Lead ageing visible by bucket.
- Planned callbacks run on time.
- Old non-moving leads closed or moved to reactivation list.

Procedure (step-by-step)

- Set follow-up frequency by lead stage.
- Do not keep every lead in forever-open status.
- Capture reason for delay / call-back request / revisit need.

- Move long pending no-response leads into proper closure/reactivation logic.
- Review ageing weekly with SAL-M.

PRE-SOP-07 - CRM / Lead System Update Discipline

Registers to update	PRE-REG-01 (Lead Master), PRE-REG-12 (CRM Audit Register)
Purpose	Keep lead data usable for sales action, reviews and management reporting.

Inputs

- Connected call details.
- Lead master / CRM access.
- Defined lead status vocabulary.

Outputs

- Accurate lead status in system.
- Next action date and owner visible.
- Cleaner data for sales and management.

Procedure (step-by-step)

- Update lead immediately after meaningful call.
- Use real remarks, not vague one-word notes.
- Set next action date after every call.
- Mark wrong numbers, junk and duplicates correctly.
- Run periodic CRM hygiene check against raw call log.

PRE-SOP-08 - Objection Handling & Sensitive Lead Escalation

Registers to update	PRE-REG-10 (Sensitive Lead Register), PRE-FMT-06 (Escalation Note)
Purpose	Handle basic objections professionally and escalate what the telecaller should not answer independently.

Inputs

- Customer objection / angry call / sensitive question.
- Current script and escalation rules.
- Sales / CRM escalation contacts.

Outputs

- Basic objection handled calmly where appropriate.
- Sensitive lead escalated in writing.
- Risky commitments avoided.

Procedure (step-by-step)

- Handle first-level objections on convenience, visit timing and basic fit.
- Escalate price, discount, refund, legal, possession and technical matters.
- Flag abusive / reputationally risky call immediately to SAL-M.
- Do not improvise unsafe answers to save the call.

PRE-SOP-09 - Daily Telecalling Summary & Reporting

Registers to update	PRE-REG-07 (Daily Dashboard), PRE-FMT-04 (Daily Summary)
Purpose	Provide Sales Manager with a one-look view of telecalling productivity and funnel quality.

Inputs

- Daily call log.
- Visit tracker.
- Sensitive escalation list.
- Pending callbacks.

Outputs

- Daily summary note.
- Visible hot leads and stale leads.
- Call productivity and booking performance snapshot.

Procedure (step-by-step)

- Close the day with total calls, connected calls, qualified leads, visits fixed, no-shows and pending hot cases.
- Highlight stale leads and same-day commercial escalations.
- Send one clean summary to SAL-M.

- Carry forward critical pending items into next day opening list.

PRE-SOP-10 - Source Quality Review & Campaign Feedback

Registers to update	PRE-REG-08 (Source Quality Register), PRE-FMT-08 (Weekly Review Note)
Purpose	Help sales management understand which lead sources are giving real quality and which are wasting effort.

Inputs

- Source-tagged lead data.
- Qualification outcome.
- Visit conversion behaviour.
- Campaign / portal / broker source list.

Outputs

- Weekly source quality note.
- Good vs weak source insight.
- Campaign feedback for sales / marketing.

Procedure (step-by-step)

- Group leads by source and review connectability, quality and visit readiness.
- Flag fake / poor-quality / wrong-ticket leads by source.
- Share weekly comments with SAL-M.
- Do not wait for month-end to highlight a bad source.

PRE-SOP-11 - Stale Lead Cleanup, Closure & Reactivation

Registers to update	PRE-REG-06 (Closure Register), PRE-FMT-05 / 09
Purpose	Prevent lead clutter and allow structured revival of dormant databases.

Inputs

- Ageing lead list.
- No-response history.
- Closure reasons list.

Outputs

- Closed / junk / invalid / not-now leads marked cleanly.
- Reactivation list created for future structured pushes.
- Cleaner active pipeline.

Procedure (step-by-step)

- Review stale leads by age bucket.
- Assign closure reason: wrong number, duplicate, not relevant, not interested, future timeline, already purchased, etc.
- Move future-potential leads into reactivation list rather than polluting active open list.
- Review closure quality weekly.

PRE-SOP-12 - Data Privacy, Number Usage & Calling Conduct

Registers to update	PRE-REG-09 (Call Quality Review), company confidentiality forms
Purpose	Protect customer data and company reputation while running telecalling operations.

Inputs

- Company confidentiality and IT usage rules.
- Approved phone / number usage practice.
- Calling conduct expectations.

Outputs

- Controlled data handling.
- Professional call behaviour.
- Reduced risk of misuse / leakage / reputational damage.

Procedure (step-by-step)

- Use approved calling method and company-sanctioned communication channels.
- Do not share data or screenshots casually.
- Maintain polite, clear and respectful language at all times.
- Escalate system or number issues rather than switching to uncontrolled personal methods.

F) Policy Library (In-depth)

Policies define rules and non-negotiable standards. If a policy is violated, record it and escalate.

PRE-POL-01 - No False Commitment Policy

Purpose: Protect Swara from incorrect promises made during telecalling.

Policy Rules (must follow)

- Telecaller must not promise discounts, final prices, scheme approvals, unit hold, possession dates or legal positions unless officially approved.
- If uncertain, say the matter will be confirmed by the concerned sales representative / manager.
- Verbal pressure from a lead is not a reason to make a false commitment.

Enforcement

- Any false commitment incident should be reviewed by SAL-M and recorded.
- Repeat incidents should trigger disciplinary action or call-quality correction.

Records and registers to update

- PRE-REG-10 sensitive lead register, call-quality notes, escalation note file.

Escalation triggers (do not delay)

- Customer demands immediate pricing exception / promise.
- Telecaller is tempted to close by improvising facts.

PRE-POL-02 - Lead TAT & Callback Discipline Policy

Purpose: Keep enquiry freshness high by responding within standard TAT.

Policy Rules (must follow)

- Fresh enquiries and missed calls should be returned within defined working TAT.
- Pending callbacks must stay visible in daily summary.
- Old backlog should not hide inside spreadsheets without owner review.

Enforcement

- SAL-M reviews daily callback pendency.
- Repeated TAT failure requires corrective review.

Records and registers to update

- PRE-REG-02 daily call log, PRE-REG-07 daily dashboard.

Escalation triggers (do not delay)

- New lead pending beyond TAT.
- High missed-call backlog or repeated callback delay.

PRE-POL-03 - CRM Data Integrity Policy

Purpose: Ensure lead status shown in system matches reality.

Policy Rules (must follow)

- Every connected conversation must result in a real status update.
- No lead should remain falsely marked as new after multiple calls.
- Duplicate, wrong number and junk leads should be closed correctly.

Enforcement

- Periodic CRM vs call-log cross-check.
- Bad data hygiene to be reviewed by SAL-M.

Records and registers to update

- PRE-REG-01 lead master, PRE-REG-12 CRM audit register.

Escalation triggers (do not delay)

- System status does not match call history.
- Large number of stale / duplicate records.

PRE-POL-04 - Lead Ownership & Handover Policy

Purpose: Avoid confusion about who owns the lead at which stage.

Policy Rules (must follow)

- Telecaller owns the lead up to structured warm handover.
- After handover, sales owner becomes primary commercial owner.

- Parallel mixed communication should be avoided.

Enforcement

- Warm handover must be written and logged.
- Lead conflict cases reviewed by SAL-M.

Records and registers to update

- PRE-REG-05 handover register.

Escalation triggers (do not delay)

- Same lead being chased by multiple staff without visibility.
- Lead lost because handover was verbal or unclear.

PRE-POL-05 - Customer Data Privacy & Number Use Policy

Purpose: Treat lead data as confidential company asset.

Policy Rules (must follow)

- Lead lists, numbers and preferences are confidential.
- No outside sharing, no personal reuse, no casual screenshot circulation.
- Only approved communication channels should be used.

Enforcement

- Misuse of customer data is a serious breach.
- Telecalling system/number use may be restricted on violation.

Records and registers to update

- Confidentiality acknowledgement, PRE-REG-09 call quality review.

Escalation triggers (do not delay)

- Data leakage suspicion.
- Use of unapproved personal channels.

PRE-POL-06 - Visit Booking & Confirmation Policy

Purpose: Reduce no-show and miscommunication around visits.

Policy Rules (must follow)

- Visits must be booked with date, time, project and sales owner clarity.
- Reminder confirmation should happen before visit slot.
- Same-day show-up / no-show must be logged.

Enforcement

- No verbal-only visit arrangements.
- Visit register should be reviewed daily.

Records and registers to update

- PRE-REG-04 visit booking tracker.

Escalation triggers (do not delay)

- Repeated no-show pattern.
- Sales team unaware of booked lead visit.

PRE-POL-07 - Hot / Angry / Sensitive Lead Escalation Policy

Purpose: Move commercially hot or reputationally risky calls to the right owner quickly.

Policy Rules (must follow)

- Hot leads requiring immediate sales closure support should be escalated same day.
- Angry leads, refund-sensitive leads or legal-threat leads must be flagged immediately.
- Telecaller must not suppress or casually close sensitive calls.

Enforcement

- Sensitive calls reviewed by SAL-M / CRM depending category.
- Delayed escalation should be treated as funnel-risk or reputation-risk issue.

Records and registers to update

- PRE-REG-10 escalation register, PRE-FMT-06.

Escalation triggers (do not delay)

- Customer asks for refund/cancellation.

- Customer threatens complaint, legal action or public escalation.

PRE-POL-08 - Call Quality & Conduct Policy

Purpose: Ensure professional tone, respectful communication and brand-safe behaviour.

Policy Rules (must follow)

- Language must stay polite, clear and patient.
- No argument, rude tone, pressure-selling or sarcasm.
- Script use should guide, not make calls robotic.

Enforcement

- Periodic sample call / remark review by SAL-M.
- Poor conduct incidents should be documented.

Records and registers to update

- PRE-REG-09 call quality review register.

Escalation triggers (do not delay)

- Customer complaint about telecaller behaviour.
- Repeated poor scripts / weak conversion behaviour.

PRE-POL-09 - Source Feedback & Stale Lead Hygiene Policy

Purpose: Improve source quality and prevent database clutter.

Policy Rules (must follow)

- Every source should be reviewed for quality, not only quantity.
- Stale leads must be moved to closure / reactivation buckets as per logic.
- Weak-data sources should be highlighted early.

Enforcement

- Weekly source review note with SAL-M.
- Monthly cleanup discipline.

Records and registers to update

- PRE-REG-08 source review register, PRE-REG-06 closure register.

Escalation triggers (do not delay)

- High junk / duplicate / non-connectable lead ratio.
- Portal/campaign producing visibly poor-fit leads.

PRE-POL-10 - Reporting & Daily Summary Policy

Purpose: Maintain one clear daily and weekly view for sales management.

Policy Rules (must follow)

- Daily telecalling summary must be sent every working day.
- Key risks and hot leads should not be buried in raw logs.
- Any large pendency or system issue should be called out explicitly.

Enforcement

- Missing daily summary to be treated as reporting lapse.
- Summary quality to be reviewed by SAL-M.

Records and registers to update

- PRE-FMT-04 daily summary, PRE-REG-07 daily dashboard.

Escalation triggers (do not delay)

- Missed report day.
- No visibility on hot leads or callback pendency.

G) Registers (Printable Templates)

Registers are mandatory records. Keep them updated daily / weekly and store them in the project or sales folder structure.

PRE-REG-01 - Lead Master Register

Purpose: Maintain one source of truth for all active leads.
Column definitions: Lead ID / Name / Contact / Source / Project Interest / Stage / Owner / Next Action / Remarks

Blank register template (print-ready)

Lead ID	Date	Source	Name	Contact	Project	Stage	Budget	Timeline	Owner	Next Action	Remarks

PRE-REG-02 - Daily Call Log

Purpose: Track daily calls attempted and outcomes.
Column definitions: Date / Lead / Call count / Connected? / Outcome / Next callback

Blank register template (print-ready)

Date	Lead	Call Attempt	Connected Y/N	Outcome	Next Call

PRE-REG-03 - Follow-up Ageing Tracker

Purpose: Track pending leads by ageing buckets.
Column definitions: Lead / Last contact / Ageing bucket / Stage / Owner / Next action

Blank register template (print-ready)

Lead	Last Contact	Ageing Bucket	Stage	Owner	Next Action

PRE-REG-04 - Site Visit / Meeting Booking Tracker

Purpose: Track visits fixed, confirmations and no-show behavior.
Column definitions: Lead / Date / Time / Project / Sales Owner / Confirmed? / Show-up

Blank register template (print-ready)

Lead	Visit Date	Time	Project	Sales Owner	Confirmed	Show-Up	Remarks

PRE-REG-05 - Warm Lead Handover Register

Purpose: Track handover from telecaller to sales owner.
Column definitions: Lead / Handover date / Sales owner / Note sent / Status

Blank register template (print-ready)

Lead	Date Handover	Sales Owner	Note Ref	Status

PRE-REG-06 - Lead Closure / Invalid / No-Response Register

Purpose: Maintain clean closure reasons.
Column definitions: Lead / Closure reason / Date / Re-activate?

Blank register template (print-ready)

Lead	Date	Closure Reason	Reactivation Bucket	Remarks

PRE-REG-07 - Daily Telecalling Dashboard Register

Purpose: Capture daily productivity summary.
Column definitions: Date / Calls / Connected / Qualified / Visits / Hot leads

Blank register template (print-ready)

Date	Calls	Connected	Qualified	Visits	Hot Leads	Pendency

PRE-REG-08 - Source-wise Lead Quality Review Register

Purpose: Review quality of each lead source.
Column definitions: Week / Source / Total leads / Connected / Qualified / Visit-ready

Blank register template (print-ready)

Week	Source	Total	Connected	Qualified	Visit-Ready	Remarks

PRE-REG-09 - Call Quality / Script Review Register

Purpose: Track coaching and conduct review.
Column definitions: Date / Telecaller / Issue / Coaching / Reviewer

Blank register template (print-ready)

Date	Telecaller	Observation	Coaching Note	Reviewer

PRE-REG-10 - Sensitive Lead / Escalation Register

Purpose: Record hot, angry or risky leads.
Column definitions: Date / Lead / Risk type / Escalated to / Closure

Blank register template (print-ready)

Date	Lead	Category	Escalated To	Status	Closure

PRE-REG-11 - Lead Source Duplicate & Correction Log

Purpose: Track duplicates and data corrections.
Column definitions: Date / Lead / Duplicate reason / corrected by

Blank register template (print-ready)

Date	Lead	Issue	Corrected By	Remarks

PRE-REG-12 - CRM Data Audit Register

Purpose: Audit if system status matches actual call behavior.
Column definitions: Date / Sample lead / System status / Actual status / gap

Blank register template (print-ready)

Date	Lead	System Status	Actual Status	Gap	Action

H) Formats / Templates (Printable)

Use these templates as standard Swara formats. Customize project identifiers and names, not the control logic.

PRE-FMT-01 - First Call Qualification Sheet

Purpose	Capture the minimum qualification fields before warm handover.
Owner	Pre-Sales Telecaller
Filing	08_Sales & CRM / Formats / PreSales

Template

FIRST CALL QUALIFICATION SHEET
Lead Name: ________ Source: ________ Project Interest: ________
Budget Range: ________ Purpose: Self-use / Investment
Timeline: Immediate / 1-3 months / 3-6 months / Later
Decision Maker? Yes / No
Configuration Preference: ________
Next Action: Callback / Visit / Handover / Close

PRE-FMT-02 - Warm Lead Handover Note

Purpose	Transfer a warm lead cleanly to the sales team.
Owner	Pre-Sales Telecaller
Filing	08_Sales & CRM / Formats / PreSales

Template

WARM LEAD HANDOVER NOTE
Lead: ________ Contact: ________ Source: ________
Project Interest: ________ Budget: ________ Timeline: ________
Key Objection / Need: ________
Visit Fixed? ________ Date/Time: ________
Handed Over To: ________

PRE-FMT-03 - Site Visit Confirmation Message Template

Purpose	Standardize visit confirmation.
Owner	Pre-Sales Telecaller
Filing	08_Sales & CRM / Formats / PreSales

Template

Dear [Name], thank you for speaking with Swara Group. As discussed, your visit / discussion is scheduled on [Date] at [Time] for [Project]. Location / meeting point: [Details]. For assistance, please contact [Sales Person / Number].

PRE-FMT-04 - Daily Telecalling Summary Sheet

Purpose	Send one clean daily view to Sales Manager.
Owner	Pre-Sales Telecaller
Filing	08_Sales & CRM / Formats / PreSales

Template

DAILY TELECALLING SUMMARY
Date: ________
Calls Attempted: ________ Connected: ________ Qualified: ________
Visits Fixed: ________ No-Show: ________
Hot Leads: ________
Pending New Callbacks: ________
Sensitive Escalations: ________

PRE-FMT-05 - Lead Closure Reason Sheet

Purpose	Close lead with usable reason.
Owner	Pre-Sales Telecaller
Filing	08_Sales & CRM / Formats / PreSales

Template

LEAD CLOSURE SHEET
Lead: ________ Date: ________
Closure Reason: Wrong Number / Duplicate / Not Interested / Future / Already Purchased / Junk / Other
Reactivation Potential: Yes / No

PRE-FMT-06 - Sensitive / Hot Lead Escalation Note

Purpose	Escalate risky or hot lead quickly.
Owner	Pre-Sales Telecaller
Filing	08_Sales & CRM / Formats / PreSales

Template

Subject: Hot Lead Escalation - [Project] - [Name] - [Date]
Lead source: ________
Requirement / urgency: ________
Budget / timeline: ________
Issue / risk / objection: ________
Support needed by: ________

PRE-FMT-07 - Callback / Revisit Reminder Template

Purpose	Run structured revisit communication.
Owner	Pre-Sales Telecaller
Filing	08_Sales & CRM / Formats / PreSales

Template

Hello [Name], this is [Caller] from Swara Group. As discussed earlier, I am reconnecting regarding your interest in [Project]. Please let me know a suitable time for a quick discussion / visit.

PRE-FMT-08 - Weekly Source Quality Review Note

Purpose	Summarize source performance.
Owner	SAL-M / Pre-Sales
Filing	08_Sales & CRM / Formats / PreSales

Template

WEEKLY SOURCE REVIEW NOTE
Week: ________
Best Source: ________
Weak Source: ________
Junk / duplicate-heavy source: ________
Action required: ________

PRE-FMT-09 - No-Response Reactivation List

Purpose	List dormant leads for structured reactivation.
Owner	Pre-Sales Telecaller
Filing	08_Sales & CRM / Formats / PreSales

Template

NO-RESPONSE REACTIVATION LIST
Lead | Last Contact | Source | Project | Reactivation Week | Remarks

PRE-FMT-10 - Script Coaching Review Sheet

Purpose	Manager coaching sheet for call improvement.
Owner	SAL-M
Filing	08_Sales & CRM / Formats / PreSales

Template

SCRIPT COACHING REVIEW
Telecaller: ________ Date: ________
Strengths: ________
Weak Areas: Greeting / Need Discovery / Closure / Objection / Data Entry
Coach Actions: ________

I) 30-60-90 Day Onboarding Plan (Pre-Sales Telecaller)

Use this plan when onboarding a new PRE-TC. SAL-M reviews completion at Day 30/60/90.

0-30 Days (Stabilize)

- Understand project list, source list, scripts and current lead handling flow.
- Start lead master, daily call log and visit tracker.
- Learn qualification script and sensitive escalation boundaries.
- Follow callback TAT discipline consistently.

31-60 Days (Improve reliability)

- Show clean CRM update discipline and reduced stale lead count.
- Improve qualification quality and visit booking clarity.
- Run ageing tracker and closure reason logic properly.
- Understand weak vs good source quality.

61-90 Days (Institutionalize)

- Operate with low supervision on daily summary and handover discipline.
- Demonstrate consistent quality on hot lead escalation.
- Support weekly source review with useful observations.
- Achieve stable KPI rhythm on calls, qualified leads and visit booking.

J) Pre-Sales Audit Scorecard - Guidance

Use PRE-REG-12 and the parameters below to audit pre-sales discipline monthly. Score 0-5 (0 = missing, 5 = strong discipline).

Suggested audit parameters

- Lead source tagging correct and duplicate control working.
- First response / missed-call TAT followed.
- Qualification notes meaningful and usable.
- Visit bookings logged and show-up tracked.
- Warm handovers recorded in writing.
- Stale lead ageing visible and not hidden.
- Sensitive lead escalation done on time.
- CRM status matches actual call behavior.
- Daily summary issued on time.
- No false commitment / commercial misstatement incident.

Scoring bands (quick)

- 0-1: High risk - telecalling system missing or unreliable; immediate corrective action required.
- 2-3: Medium - system exists but discipline inconsistent; focus on TAT, CRM hygiene and handover clarity.
- 4-5: Strong - predictable lead handling; focus on conversion optimization and source-quality improvement.

Final Structure Recommendation

Best rollout sequence: **PRE-TC under SAL-M** -> start with one telecaller -> activate lead master, call log, visit tracker and daily summary -> stabilize scripts and TAT -> then scale to a larger pre-sales pod if lead volume increases. Do not give pricing / scheme authority to the telecaller. Keep the role conversion-oriented but governance-safe.