

Handling Email Inquiries

1) Receive email. Sometimes they look like this:

Subject: New Inquiry from Danielle Roe

Danielle Roe sent you a message.

I would like more information about:	Company Event
Event Date	12/14
Approximate Serve Time:	6:30 PM-8:30 PM
Approximate Serve Count	200
City	Roseville
Name:	Danielle Roe
Company:	Danielle Roe Events
E-mail:	danielle@danielleroeevents.com
Phone:	925 8905724
Details:	I am planning a corporate holiday party for my client, Realty ONE Group. They are interested in your ice cream bar for their event.

And other times, they are little bit less organized:

From: Ashley Studebaker [<mailto:ashley@saratogagroup.net>]

Sent: Tuesday, November 7, 2017 11:24 PM

To: Events@Richs <events@richsicecreamcatering.com>

Subject: Wedding Service Inquiry

Hello,

I am getting married 11/9/18 in Lincoln, CA and wondering what your rates are for service for 85?

Thank you!

Ashley Studebaker

Realtor, Property Manager

BRE#02004017

phone: 916.596.9000

mobile: 916.303.3733

site: www.saratogagroup.net

email: ashley@saratogagroup.net



- 2) After receiving the email we always call the client before sending a quote. During this call, we want to try to capture a few vital pieces of information, as well as getting a general feel for the event. Vital pieces of information include:
- Event Date (and time, if available)

- b. Event Venue
- c. Serve Count
- d. Menu items of interest
- e. Contact's phone number and email address if not listed. Verify them if they are listed.

We'd also like to know if there are other special details about their catering we should know when crafting their quote, and should get a rough idea of their budget.

- 3) After the phone call, enter the contact in PipeDrive and set yourself a task to email them their quote.
- 4) Once the contact is in Pipedrive, put together their quote.
- 5) Email contact their quote. Check off your task in Pipedrive and set a new task to follow up with them the next day.
- 6) Add the event as pending in Google Calendar.
- 7) Print a copy of the quote and add it to the appropriate binder/clipboard.
- 8) Follow up with contact appropriately.