



New Customer Enquiry — Intake & Response

A short, repeatable process so every enquiry is captured, answered quickly, and never lost. This is a sample of the kind of SOP we document for clients.

Process owner	Sales / Front desk	Version	1.0 (sample)
Applies to	All inbound enquiries	Review cycle	Quarterly

Purpose

Ensure every new customer enquiry — by phone, email, or web form — is logged, acknowledged within a set time, and routed to the right person, so no opportunity slips through.

Procedure

- 1. Capture the enquiry.** Record name, contact details, company, and what they need in the shared enquiry log (or CRM).
- 2. Acknowledge within 2 hours.** Send a short reply confirming receipt and expected next step. A template keeps this fast and consistent.
- 3. Qualify.** Note budget, timeline, and fit. Flag anything urgent.
- 4. Route & assign.** Pass to the right owner with a clear due date.
- 5. Follow up.** If no reply in 3 working days, send one polite nudge, then close or reschedule.

Where AI helps

Task	Manual today	With AI assistance
Logging enquiries	Copy-paste by hand	Auto-captured from email / form
First response	Written from scratch	Drafted instantly, you approve
Routing	Decided ad hoc	Suggested by rules / intent
Follow-up	Easily forgotten	Reminders raised automatically