



Local Presence Calling SOP · Copy-Paste

PM CONSULTING AI NEWS · WEEKLY INTELLIGENCE

1		Owner: Review last 30 days of missed outbound calls in phone system.
2		Admin: Turn on local presence dialing in HighLevel settings.
3		Sales manager: Assign color tags to 'hot', 'cold', and 'unreached' leads using the bulk update tool.
4		Tech: Build workflow to trigger SMS for every unanswered outbound call.
5		Sales rep: Place a test call to your own phone, confirm number shows local area code.
6		Admin: Check daily call pickup rates and compare to previous week.
7		Owner: Assign follow-up calls for all leads who replied by SMS.
8		Sales manager: Hold a weekly huddle to review progress and adjust tags.
9		Admin: Document workflow steps and share SOP with all team members.
10		Owner: Revisit process monthly and refine based on answer and conversion rates.