

Home Service Call Center Scripts Handbook

The Customer Service Operating Manual for Home Service Contractors

| | |
|---|-----------|
| PRINCIPLES | 3 |
| The Pattern for Excellence | 4 |
| A One-By-One Breakdown | 5 |
| Application Examples | 7 |
| Inbound Call Flow | 8 |
| Inbound Call Flow with Price Objections | 9 |
| Inbound Call Flow with Scheduling Constraints | 11 |
| Outbound Calls | 13 |
| Setting Appointments With Leads | 13 |
| Parts Have Come In | 13 |
| Scheduling Service | 14 |
| Happy Calls | 15 |
| “Money on the Table” Follow-Up Calls | 15 |
| Rehashing Estimates | 16 |
| If they do not rebook with you: Always offer any additional service and a follow up call | 17 |
| Cancellations Script | 18 |
| Selling Service Agreements | 19 |
| Inbound Calls | 19 |
| Soft Pitch: | 19 |
| Deep Dive Pitch: | 19 |
| Outbound Calls | 19 |
| How to Handle Angry Customers | 20 |
| What should your Call Center Look Like? | 21 |
| Recruiting | 21 |
| Job Title: | 25 |

| | |
|---|-----------|
| Department: | 25 |
| Job Purpose: Creating the best customer service experience customers have ever had by applying the principles we practice in our company culture. | 25 |
| Job Description: Schedule technicians by taking inbound calls, ensuring customers have the best customer service experience they have ever had while maintaining our database and making outbound calls to fill empty schedule spots. | 25 |
| Job Title: | 26 |
| Department: | 26 |
| Job Purpose: Creating efficiency in the service department by organizing scheduled jobs, choosing the best match for service and keeping customers updated all while giving a great experience. | 26 |
| Job Description | 26 |
| Onboarding | 28 |
| Training | 28 |
| Ongoing Reviews and Performance | 29 |
| To prepare for reviews we want to make sure we do our research first. Contact any team leads or supervisors to see what feedback they have to offer. Write it all down and have your portion of the interview written down before the employee is in front of you. This helps in making sure we touch all points and our conversations (even when challenging) are based on facts instead of feelings. | 29 |
| KPIs & Employee Bonus Pay | 30 |
| Keeping Your Call Center Excited | 30 |
| Outbound Campaigns: | 31 |
| Service Titan Walkthrough Videos/Screenshots - How to Pull Reports | 32 |
| Creating Call Center SOPs | 32 |

PRINCIPLES

The Pattern for Excellence

The Pattern for Excellence is a communication framework that enables you to WIN MORE MOMENTS with others. As you apply these principles, you will become a more service-minded individual. You'll get more done in less time, build more long-term relationships and achieve more meaningful results in your life and work.



A One-By-One Breakdown

Let's look at each principle in detail. Then, we'll share the processes this Pattern makes possible for you as a Customer Service Specialist in the Home Services Industry:

1. **Be Positive - Positivity Attracts People.** The moment (*there's that word again*) a customer hears your voice, they are instantly making judgments about whether it was smart for them to contact you or not. If your energy is warm and positive and contagious, you'll attract more customers to you and your company. But if you sound like you'd rather be doing anything else in the world other than serving your customers, they'll find a reason to go elsewhere.
2. **Be Prepared - Preparation Inspires Confidence.** When you think about professional athletes, musicians and great orators, it seems silly for these people to not have a coach. To not be constantly working on their game would be a terrible mistake. And yet, in business, we often think coaching and practice and getting better at our craft is an exception, not the rule. But the best and most confident Customer Service People are the ones who are always preparing themselves for anything. They're listening to their calls, getting feedback, planning responses to tough questions and building their confidence. Because if you're confident, the customer will be too.
3. **Listen - Understanding Invites Connection.** When the customer starts talking, your first responsibility is to LISTEN. To understand what they are going through and how it's affecting them. People don't care how skilled you are at solving their problem until they **feel** that you understand their problem. You must listen with the intent to understand them, not the intent to answer. Your job is to make them feel heard, not show them that you're a "good listener." To listen is a selfless act of the service-minded.
4. **Care - Empathy Validates Worth.** You have to understand that you're not just taking care of a technical problem (*broken A/C, leaky pipes, malfunctioning garage door, software integration*). Your **main job is to take care of the person** dealing with the technical problem. It's to validate their worth as a human being and let them know that they're important to you. You listen to understand what they're going through and you empathize to show your understanding and validate their worth.
5. **Reassure - Assurance Builds Trust.** Just because the customer is talking to you doesn't mean they trust you yet. You still need to reassure them that they have called the right place and you can help. You've got to put them at ease and let them know what you

can do for them. Don't fall into the trap of telling what you **can't** do. That's not helpful to anyone, especially the customer.

If you're communicating with positivity, building the customer's confidence, listening to them, showing them that you care and reassuring them you can help, then you *should* have the customer's trust. Which means you've now earned the ability to ask them to take action:

6. **Ask - Asking Encourages Action.** To ask the right questions to encourage people to take action is a superpower. It's not enough to simply present your customer with options and solutions... You've got to ask them to pick one! To move forward! To book an appointment! If you don't ask, you don't get.
7. **Be Valuable - Value Creates Commitment.** I once heard that the definition of value is *"the difference between the perceived price and the actual price."* When a customer sees or hears about a product or service, our brains start to work like calculators, crunching numbers and guessing what the price will be. So once we see the actual price, we're filled with the desire to buy or the desire to run away, depending on how close our estimate of the price turned out to be. Your job in Customer Service is to be so valuable to the customer throughout the course of the conversation that, when you finally get to the price, the customer is filled with a desire to move forward. Because the price you present is lower than the price they imagined in their minds as a result of your communication.
8. **Be Grateful - Gratitude Reinforces Unity.** Customers become loyal to your business (and to you, personally) when they feel like you are grateful to serve them. They want to know they are important. Too many companies make the mistake of having a "you're welcome" attitude, treating customers like they should be grateful. They give the impression that they worked hard and did their part and now the customer should be kissing their feet and lavishing them with praise. The opposite is true: ***you should be the one thanking them for the opportunity to serve.***

The Pattern for Excellence is an extremely powerful tool. Applying its principles will help you WIN MORE MOMENTS. And the more moments you win, the more you will achieve in your life and work.

Now that the foundation has been laid, let's look at the specific scripts and processes you can use as a Customer Service Specialist in the Home Services Industry.

Application Examples

Inbound Call Flow

Standard Inbound Phone Call, No Objections

Be Positive & Inspire Confidence:

(Smile) *"It's a GREAT day at (company name)! This is ___(Name)___, How can I help you?"*

- a. Get the customer's name. *"I can help you with that. Who do I have the pleasure of speaking with? _____, Wonderful. My name is _____ I am going to take care of you today."*
- b. If the customer already gave you their name, repeat it back. *"You said your name was _____? My name is _____ and I am going to be taking care of you today."*

Listen:

Restate the problem, show them you're listening and that you care.

- *"Tell me more?"*
- *"What are you experiencing?"*
- *"What's it doing?"*
- *"Has this happened before?"*

Care:

- Relate to or identify with their situation - *"That's the worst... I hate when that happens..."*
- Use an expression of concern - *"I hate to hear that... Oh no!"*
- Agree to the gravity of their situation - *"You're right for giving us a call... That is very frustrating..."*

Reassure & Ask "When?":

- *"Yes, I can help you with that. You've called the right place. When would you like us to come out?"*
 - *"Alright, let's get your contact information and we'll look at the schedule together..."*

****Collect the Customer's Information & Book the Call****

Be Valuable:

"Perfect, now that I've got you on the schedule, here's how we work:

What we'll do is send out a trained and certified technician that is backed by our company that's been in business since _____. You're in great hands. He's going to come out with a fully stocked truck to look at the scope of the work (insert customer's problem here), determine what you need fixed, go over all of your options and give you a price before he starts. To send our trained technician right now and have him do all that it is only \$____. We accept cash, checks, or credit cards. So I can let our technician know, what is your preferred method of payment?"

Confirm & Be Grateful:

"Alright (customer name), you're all set for (confirm appointment details). So you know, we also offer (insert your additional services). Can I have the Technician take a look at any of those things for you while he's there? (Respond to their answer)

Thank you for choosing (company name)! We're grateful for the chance to serve you."

Inbound Call Flow with Price Objections

Inbound Phone Call, Customer Repeatedly Asks for a Price

Be Positive & Inspire Confidence:

(Smile) *"It's a GREAT day at (company name)! This is ___(Name)___, How can I help you?"*

Customer: "How much do you charge?"

PLAN A: Stick to the Call Flow

- c. Get the customer's name. *"I can help you with that. Who do I have the pleasure of speaking with? _____, Wonderful. My name is _____ I am going to take care of you today."*
- d. If the customer already gave you their name, repeat it back. *"You said your name was _____? My name is _____ and I am going to be taking care of you today."*

Listen:

Restate the problem, show them you're listening and that you care.

- *"Tell me more?"*
- *"What are you experiencing?"*
- *"What's it doing?"*
- *"Has this happened before?"*

Care:

- Relate to or identify with their situation - *"That's the worst... I hate when that happens..."*
- Use an expression of concern - *"I hate to hear that... Oh no!"*
- Agree to the gravity of their situation - *"You're right for giving us a call... That is very frustrating..."*

Reassure & Ask "When?":

- *"Yes, I can help you with that. You've called the right place. When would you like us to come out?"*
 - *"Alright, let's get your contact information and we'll look at the schedule together..."*

****Collect the Customer's Information & Book the Call****

~OR~ The Customer Says at Any Point During the Ask Phase: "Before I book anything, I need to know how much you charge?"

PLAN B: Build Value, Reveal Dispatch Fee & Ask Again

Be Valuable:

"I can cover all that for you, here's how we work:

What we'll do is send out a trained and certified technician that is backed by our company that's been in business since _____. You're in great hands. He's going to come out with a fully stocked truck to look at the scope of the work (insert customer's problem here), determine what you need fixed, go over all of your options and give you a price before he starts. To send our trained technician right now and have him do all that it is only \$_____.

So, when would you like us to come out?

- *“Alright, let’s get your contact information and we’ll look at the schedule together...”*

****Collect the Customer’s Information & Book the Call****

~OR~ The Customer Says After You Build Value: *“I’m gonna shop around...” or “I need to know the price...” or “I’m going to talk to my spouse...”*

PLAN C: Use I.R.A.P.

I.R.A.P.:

- **Isolate:** *“Is the price the main thing that you are concerned with today?”*
- **Resolve:** *“If it weren’t for the price would you move forward with the appointment?”*
- **Ask:** *“I found a coupon that will give you \$30 off to help subsidize the cost of the work. Will that be enough for you to move forward with us? I do have some time today, tomorrow or this week.”*
- **Pause:** *Wait for their response.*

Confirm & Be Grateful:

“Alright (customer name), you’re all set for (confirm appointment details). So you know, we also offer (insert your additional services). Can I have the Technician take a look at any of those things for you while he’s there? (Respond to their answer)

Thank you for choosing (company name)! We’re grateful for the chance to serve you.”

Inbound Call Flow with Scheduling Constraints

Inbound Phone Call, Customer Wants Service Sooner Than You Have Available

Be Positive & Inspire Confidence:

(Smile) *"It's a GREAT day at (company name)! This is ___(Name)___, How can I help you?"*

- e. Get the customer's name. *"I can help you with that. Who do I have the pleasure of speaking with? _____, Wonderful. My name is _____ I am going to take care of you today."*
- f. If the customer already gave you their name, repeat it back. *"You said your name was _____? My name is _____ and I am going to be taking care of you today."*

Listen:

Restate the problem, show them you're listening and that you care.

- *"Tell me more?"*
- *"What are you experiencing?"*
- *"What's it doing?"*
- *"Has this happened before?"*

Care:

- Relate to or identify with their situation - *"That's the worst... I hate when that happens..."*
- Use an expression of concern - *"I hate to hear that... Oh no!"*
- Agree to the gravity of their situation - *"You're right for giving us a call... That is very frustrating..."*

Reassure & Ask "When?":

- *"Yes, I can help you with that. You've called the right place. When would you like us to come out?"*
 - o *"Alright, let's get your contact information and we'll look at the schedule together..."*

****Collect the Customer's Information****

Upon reviewing the schedule, you see that you don't have the customer's desired timeframe available. So, you offer...

The Urgency List:

"Thank you, (name), I have the schedule pulled up and I know you said you wanted someone today... Here is what I will do: I am going to add you to our urgency list to give you faster service. If a customer reschedules or a technician finishes up early in your area, we will send him out with a 30 minute notice. In order to get you on my urgency list, I do need to have you on my schedule. My next guaranteed appointment is (date/time). May I book that appointment in order to get you on our urgency list?"

If the customer says "No," insisting that they need a sooner guaranteed appointment time, offer to be their...

Back-Up Plan:

"I understand your sense of urgency. (Customer Name), let us be your back-up plan. I can put you on our urgency list and guarantee you someone will be there no later than (guaranteed appointment time). In the meantime, if you find something else that suits your needs, you can give us a call and we'll take you off the schedule. But what I'd hate to see happen is you lose this appointment and end up having to wait longer for someone else. May I book this appointment to get you on our urgency list and we'll be your back-up plan?"

Be Valuable:

"Perfect, now that I've got you on the schedule, here's how we work:

What we'll do is send out a trained and certified technician that is backed by our company that's been in business since _____. You're in great hands. He's going to come out with a fully stocked truck to look at the scope of the work (insert customer's problem here), determine what you need fixed, go over all of your options and give you a price before he starts. To send our trained technician right now and have him do all that it is only \$____. We accept cash, checks, or credit cards. So I can let our technician know, what is your preferred method of payment?"

Confirm & Be Grateful:

"Alright (customer name), you're all set for (confirm appointment details). So you know, we also offer (insert your additional services). Can I have the Technician take a look at any of those things for you while he's there? (Respond to their answer)

Thank you for choosing (company name)! We're grateful for the chance to serve you."

Outbound Calls

The Five Types of Outbound Calls

Setting Appointments With Leads

Be Positive & Inspire Confidence: *“Hi this is (your name) calling from (name of company). Is this (customer’s name)?”*

“Perfect, the reason I’m calling is because my wonderful team at (LEAD GENERATORS) informed me you’re interested (service talked about) that gives you (benefit).”

Optional: If the customer sounds skeptical, like they’re not really sure, say: *“To be sure I’m not wasting your time, I just have a quick question: what’s your current situation (describe the service you’re calling for)?”*

Listen: *“I’m curious to know what are you experiencing that makes you interested in (service talked about)?”*

- *Qualifying question 1*
- *Qualifying question 2*
- *Other than yourself, who would be involved with the decision? (If someone other than the main contact answers)*

Care: *“Oh no...” or “That’s frustrating...” or “That’s definitely something you want to get fixed/taken care of...”*

Reassure: *“You’re talking to the right company. We can absolutely help with that.”*

Ask: *“When would you like me to send out an estimator to look at your options with you?”*

****GATHER LOGISTICS AND BOOK THE APPOINTMENT****

Be Valuable: *“Perfect, now that we’ve got you on the schedule, let me tell you how we work...”*

****OFFER YOUR VALUE STATEMENT****

Optional: Use your intuition here, but if they sound like the kind of person that may ghost you, ask: *“Is there any reason you would not be available when we come out at (appointment time)?”*

Be Grateful: *“You’re all set. Our Technician will be out there by (appointment time). So you know, we also offer (additional services). Can I have the Technician look at any of those things for you while he’s there?”*

Parts Have Come In

Be Positive & Inspire Confidence: *“Hi this is (your name) calling from (name of company). Is this (customer’s name)?”*

"Hi (customer's name). I have some great news! The (name of part) has come in so we can fix your Heat/AC."

Listen: *"Has anything changed since we were last out there that you would like me to make the technician aware of?"*

Care: Empathize as needed.

Reassure/Ask: *"We are excited to get this taken care of for you. Just to confirm I have your address as _____. Is that correct? Wonderful! I have availability as soon as _____. What does your schedule look like?"*

Be Valuable/Additional Services: *"We will be sending out (name of tech) as they diagnosed your system and are familiar with it and what needs to be done to make the repair. They will get you up and running and will look over the system once the repair is done to confirm everything is operating as it should. We want you to be comfortable in your home again. Just so you know we also do (list some list other additional services). Is there anything else we can help you with today?"*

Be Grateful: *"We look forward to seeing you (review appointment day and time) Thank you for choosing [name of company]. Have a great day!"*

Scheduling Service

Be Positive & Inspire Confidence: *"Hi this is (your name) calling from (name of company). The company you trust to take care of your (services you provide) needs. Is this (customer's name)?"*

"I am calling because it is time for your annual maintenance that is included with your (name of service agreement) membership."

Listen: *"How has your system been running?"*

****Or if you were out there for a repair recently****

"I see we were out there last month to (mention service that was done). How has your system been running?"

Care: If all is well: *"I am so glad to hear that!"* Or if something is wrong use an appropriate empathy statement.

Reassure: *"We want to keep everything running smoothly for you."*

Ask: *"We are scheduling maintenance as soon as _____. What does your schedule look like?"*

Be Valuable: *"We will send out a trained and certified technician to your home to perform that ____ point inspection of your system. This includes (list 2-3 things that are included in the maintenance that you think the customer would like to be aware of). If they find anything of concern they will be sure to bring it to your*

attention. We want you to have peace of mind right now. Just so you know we also...(list additional services). Is there anything else I can help you with?"

Be Grateful: *"Thank you for partnering with (name of company) to take care of your (services you provide) needs. Have a wonderful day!"*

Happy Calls / Outbound Maintenance Plan Sales

"Hi, this is (your name) with (company name). Is (Customer Name) there?"

"Hi (Customer Name). I was just calling to follow up regarding the appointment you had with (comfort advisor, tech name) and I wanted to make sure everything completed there was to your satisfaction and you are taken care of?"

"I would love to ask you a few questions regarding your experience with (company name), do you have a moment?"

"On a scale of 1-10, what's the likelihood you would recommend us to a friend or colleague?"

- *"Great, thank you! We do love getting referrals and we want to offer you an incentive! For any referral that calls in and does any service or install with us... (pitch your referral program)"*

"Thank you so much for being our eyes and ears out in the field!"

If they are happy and not a member of your maintenance plan, offer the maintenance plan like this:

"I noticed that you are not a family plan member with us. Most of our customers join the family plan because (explain the benefits). I'm wondering why?"

"To join our family plan program it's only (\$ per month). Would you like to sign up to receive those benefits?"

"Thank you so much for giving us the opportunity to serve you. We look forward to next time."

"Money on the Table" Follow-Up Calls

Be Positive & Inspire Confidence: *"Hey (customer name), this is (your name) from (your company). Is this a bad time?"*

Listen: *"I understand (Tech name) came out today and presented you with the option to (present the options the customer was given in-person)."*

Care: *"I know you're dealing with (talk about the customer's pain/problem), and we'd certainly like to help you take care of that."*

Reassure: *"Our team is ready to get the job done for you."*

Ask: *“What was missing from (Tech name)’s proposal for you that would help you feel confident moving forward?”*

****LISTEN TO THE CUSTOMER’S RESPONSE, THEN RESTATE IT BACK TO MAKE THEM FEEL HEARD****

Ask: *“Is that the only concern you have?”*

****IF THEY GIVE MORE CONCERNS, LISTEN AND RESTATE****

Be Valuable: *“Thanks for confirming all that for me...”*

So from what I understand, if I can (offer a solution to their problem - guarantee results, assure them the problem will be solved, the energy bill will be reduced), will you feel confident having our team come fix that for you?”

****PAUSE AND WAIT FOR THEIR RESPONSE****

Be Grateful: *“Perfect, when would be the ideal time for them to come out?”*

****BOOK THE CALL****

Rehashing Estimates

Good Morning, This is _____ with _____. May I speak to Mrs. _____?

Hi, _____. I just wanted to follow up with you on your comfort evaluation with (advisor name) on (date), do you have a moment?

Thank you, we appreciate your time.

(Customer Name), have you replaced your system?

IF YES: Show Care: *“Example- I am so glad that you were taken care of, I would like to ask you a few questions about our service so we can better serve our neighbors”*

- Did (comfort advisor) answer all of your questions and make you feel comfortable with the process?
- Did the customer service representative meet your expectations when booking the call?
- Did we arrive in the promised time frame?
- Can I ask you what we could have done better to earn your business?
- Who did you end up using for replacement?

Thank you for your feedback (name) and for the opportunity to earn your business. We also offer (additional services), if you ever have a need just give us a call. Is there anything else I can help you with today?

IF NO:

- Did (advisor) leave you a copy of the quote?
- Have you received other quotes?
- What is holding you back from making a final decision?

PRICE: I understand, this is a big decision. We have a goal here at Just in Time to make sure all of our neighbors are comfortable this year and we would like to help. If I can get you a discount off of your current quote, would that be enough to move forward?

YES: Here is what I can do. I can send out my Sales Manager/Team Lead directly to your home to go over that bid with you. We are cleaning out our warehouse right now to get ready for the New Year. We have some new customer incentives and equipment specials that can help. He can answer any additional questions and he is authorized to give you the best deal possible. When would you and your spouse be available for him to come out?

NOT READY: Yes, this can be quite a commitment. Is your unit still keeping you comfortable at this time? (Yes) We are so glad to hear that! Units tend to have a 10 year lifespan and break on the coldest/hottest day of the year. It looks like your unit is about _____ years old already. We do have some seasonal specials kicking off for New Year, would you like to hear more about them?

YES > Book the Job > (See value statement under price)

NOT RIGHT NOW > I understand, we would love to follow up with you and see how we can earn your business. Would you mind if I gave you a call next month?

Always end call with Gratitude for their time and for giving us an opportunity

If they do not rebook with you: Always offer any additional service and a follow up call

Cancellations Script

Customer calls in to cancel service or a service agreement:

Be Positive: (Smile) "It's a GREAT day at (company name)! This is ___(Name)___, How can I help you?"

- Get the customer's name. "I can help you with that. Who do I have the pleasure of speaking with? _____, Wonderful. My name is _____ I am going to take care of you today."
- If the customer already gave you their name, repeat it back. "You said your name was _____? My name is _____ and I am going to be taking care of you today."

Be Confident: I hate to hear that you want to cancel, but I can certainly help.

Listen: Is the reason for your cancellation price, question about the service, or that you found another provider who can get there sooner?

Care / Reassure: If that's the case, I feel terrible we didn't communicate that we can help you with that concern before!

Ask / Value: If can resolve that concern about [price / service / schedule] for you by [taking 15% off / waving the dispatch fee / moving you up in our schedule / offering a free tune-up / match the price of the other company / having the Technician follow certain instructions when he arrives], would that be enough for you to move forward with us today?

Be Grateful: Wonderful. Let me apply that special promise for you right now, and I'll make sure our Technician is prepared to come to your home at the time of service.

****If they insist on canceling****

(Optional) Reassure: You got it. I just canceled your appointment for you. So you know, we do offer free/discounted second opinions if you're not totally satisfied with the inspection or work that's done by someone else.

Gratitude: Thank you so much for calling to let us know. We appreciate you thinking about us and hope we can serve you in the future.

Selling Service Agreements

How to Sell Service Agreements on Every Call Possible

Inbound Calls

Soft Pitch:

"Would you like to save some money on your service today? Great! Because we have a family plan here. We want to keep you comfortable all year round and avoid costly expenses. So what this does is it pays for itself because we are going to give your system a clean bill of health twice a year. In the meantime if you ever need us, you get an instant savings of 15% off of any repairs. You're also going to be first priority in line, every time. And you'll also save \$30 off of the diagnostic work (assessment, examination, evaluation) every time we go out. What do you think about that? Would you like to save some money and join the family plan today?"

Deep Dive Pitch:

For at the end of the call when you're offering additional services:

"(Customer Name), I notice you're not a member of our family plan. Most of our customers join our family plan because (highlight two or three benefits). I'm wondering why you're not a member?"

*Here's how our plan works: It helps save you money today because when you evaluate your system you automatically save (immediate savings on inspection). With our family plan, you never have to pay the diagnostic charge. I know you said your system is down and it may need some repairs-- and we can get that taken care of today with a 15% savings on any parts. Plus, you get a 12-month warranty on those repairs. The great thing is that it also pays for itself because not only do we get everything fixed up today, we are going to come out two times over the next twelve months to do preventive maintenance so that things like this don't happen again in the future. This makes sure everything is safe and working well for your family. Maintenance trips are normally \$_____ but it comes included with our plan. Plus, when you're a family plan member it gives you top priority for getting a service technician to your home when you need it. The plan is only \$15.99 a month and that gives you worry free service. So, the 15.99 a month is going to save you (inspection fee savings) off the top today **plus** (percentage of repair savings) off repairs today. Would you like to become a family plan member today and take advantage of those savings?"*

****BOOK THE CALL****

Outbound Calls

This script is usually used during a happy call or estimate follow up:

"After reviewing your information, I noticed you were not enrolled with our family plan. May I ask why?"

Show empathy and understanding for their side of things. If the opportunity presents itself, create value again by overcoming their concerns with the benefits of your service agreement and how *it can prevent things like this from happening again in the future.*

How to Handle Angry Customers

Turn Upset Customers Into Raving Fans

Be Positive & Inspire Confidence: *"...how can I help you today?"*

*****Reassure & Care:** *"Oh no, that's not good" or "I'll be happy to help you with that."*

Get Name: *"Who do I have the pleasure of speaking with?"*

Introduction: *"My name is (your name) and I'm going to take care of you."*

Listen & Care: Restate the problem or, *"Tell me more about what you are seeing..."* or *"Oh no..."* or *"That's terrible..."*

Reassure: ***"You did the right thing giving me a call to let us know our services have not been perfect. I'm going to take care of you and I'm going to make you my number one priority today."***

Ask: *"I want to get someone out as soon as possible. When would you be available for us to come out?"*

Contact Info: *Check customer's account.*

Scheduling: *Get them scheduled.*

Build Value: *"Ok, (customer name), here's what we're going to do. First, I'm going to put you first on our urgency list and have the next available Technician come to your home. In the meantime, I want to reassure you that you are not responsible for paying for our mistakes. That's on us. The only way you'd pay for anything is if our Technician discovers a completely new and unrelated issue. Seeing as that's unlikely though, you are not responsible for our mistakes."*

Reassure Again: *"I've been taking note, I'm aware of your situation, and I want you to know I am going to share this information with my team so that we can ensure we don't make this mistake again. Is there any other feedback you want to provide me at this time?"*

Describe Follow Up: *"After the appointment I'm going to call and follow up to make sure you had a good experience and everything is taken care of. As soon as our Technician becomes available, we'll have him come out there. I'll give you 30 minutes' notice before his arrival." (Put in a calendar or put on sticky notes to remember to call!)*

If the Customer Continues Venting: *"Mr. Jones we do appreciate your feedback, it only makes us better. I have been taking notes of what has occurred and I plan to share this in my next company meeting that we are having on Wednesday. Is there anything else that we can do to provide the best experience for our customers?"*

FOR MANAGERS

What should your Call Center Look Like?

When building out the perfect arrangement in a call center, there are a few best practices to follow for efficiency and better workflow.

Seating:

- 3 walls per desk to minimize noise effects while speaking to customers
- Dispatchers should be in their own area outside of the CSR room but in proximity to it.
- Where possible give the dispatcher a window to the call center for easy communication
- Newer CSR spots should be closest to a lead or manager for quick guidance

Setting:

- Soft colors that are bright or “happy” colors
- Chairs are used 8-12 hours per day, keep them comfortable
- Quiet music ability such as bluetooth speakers or a radio
- Motivational posters for the walls AND your company statement/Motto
- Hang a white board for tracking daily goals
- Have a shredder for those times they need to write down a credit card #
- Organizational tools per desk like file holders

Recruiting

When recruiting new staff for dispatching and call takers we need to make note of what culture we currently have and what culture we want to achieve. The sifting through of resumes and interviews should first help us reach that goal and secondly reach the skill level we are hoping for. Skills are easier to train on than character.

Example Dispatch Ad

We Want a Dispatch Super Star!

Do you live to make sense out of chaos?

Are you a multi-tasking master?

Are you experienced in Dispatch and LOVE having several balls in the air at once?

Is this you? If so, we want to talk with you!

We are looking for a full-time experienced Dispatcher who is energetic, talented and a clear communicator who will embrace the tasks needed to keep track of an ever-changing Dispatch board.

Company Name is growing and we hire only the best! We exist to provide customers--your neighbors and friends--with the best in electrical, plumbing, and HVAC services.

The ideal candidate will be able to answer **YES!** to each element in this description:

- You have at least two years experience as a dispatcher in the home services industry (plumbing, HVAC, electrical)
- You love interacting with customers
- You like chocolate (This was just to see if you are paying attention).
- You are interested in growing and developing as a professional
- You enjoy a family-like work culture
- You will apply your strong interpersonal communications skills to manage a diverse team of technicians

Key Responsibilities:

- Communicate with customers and technicians via phone, text, radio, and email.
- Schedule and dispatch workers, crews, equipment, and service vehicles.
- Keep detailed records of interactions and transactions.
- Coordinate schedules for personnel and equipment.
- Complete 'happy calls' after every job to ensure our customers are, well, HAPPY!

Some of the benefits we offer:

- Paid vacation time that begins to accumulate after just six months!
- Paid time off above and beyond vacation time
- Family corporate culture
- Opportunities to grow within the company
- Best technicians in the business!
- Medical/Dental/Vision for Full-Time Employees
- 90 Day Performance Evaluation with potential for pay increase
- 401K Matches after 2 Years Full-Time Employee

Don't take our word for it. Read what our customers say about us:

"Very professional, very knowledgeable, and competent. Would definitely recommend this company." Corey S.

"They were patient and answered every question I had." Andrew A.

SUBMIT YOUR RESUME TODAY!

Example CSR AD

Is This You?

Positive, motivated, ready to make a difference and a job is just not enough for you!

You have customer service experience, are prepared to learn and want a Career!

You have great communication skills and you want to be appreciated for what you bring to the table.

We are looking for YOU.

Company name is growing and we are searching for the perfect person for our full-time, Customer Service Representative position.

This is not a job, it's a career, one where you get to grow and advance in a positive workplace. We offer attractive benefits too!

What we offer:

- Paid vacation time that begins to accumulate after just six months!
- Paid time off above and beyond vacation time
- Family corporate culture
- Opportunities to grow within the company
- Best technicians in the business!
- Medical/Dental/Vision for Full-Time Employees
- 90 Day Performance Evaluation with potential for pay increase
- 401K Matches after 2 Years Full-Time Employee

The Position:

- You will receive incoming calls and make outbound calls. All day long!
- You will schedule everything from service calls to maintenance appointments and inspections.
- You will offer our customers personalized products, services, and solutions.
- You will get to know the HVAC business like the back of your hand.
- You will be working in a fast-paced environment so bring your roller skates!
- You'll follow up on estimates, quotes, maintenance, and membership agreements.

You are our ideal candidate if:

- You have a lot of home services industry Customer Service and/or Call Center experience.
- You always place the customer 1st.
- You can adapt to different work conditions
- You know your way around a computer!
- You are patiently and pleasantly persistent.
- Customer Service is your SuperPower.

If this doesn't convince you to submit your resume today, let our customers tell you about us:

What to look for on a resume:

1. Experience
 - a. Where has this person worked before?
 - b. Is their work history stable?
 - c. Is this person a job hopper?
2. Skills
 - a. What are their skills?
 - b. Do they connect with what we advertised?
3. Professionalism
 - a. Misspellings
 - b. Grammatical errors
 - c. Effort in Creating the resume, is there character in it
 - d. Did they include a cover letter?

Interviewing Tips:

- No one gives the best and most accurate answer first, dig into the response with how/why/what/when/who/where
- Avoid asking Yes/no questions where someone can tell you what they “think” you want to hear, instead, ask situational based questions
- Listen for the Pattern for Excellence: Are they positive? Sound confident? Good listeners? Grateful for past experiences whether good or bad? If you cannot be confident when saying what you can do, it will be really hard to sound confident about the things you are just now learning about.
- Don't forget to sell your company and what you can offer them Have in mind before you start what you need for your ideal culture
- You will be looking for trainability, character and energy

Qualities we are looking for: * Positive Attitude * Quick Learner * Innovative Thinker * Self-Motivated * Team Player * Organized * Outgoing * Upbeat * Confident

Interview Questions:

1. Tell me about your work experience? Start with your most current position.
2. What do you know about (Your Company)?
3. When looking at the job ad, what part made you want to apply?
4. Tell me something about you that I would never learn from a resume:
5. What is your definition of Customer Service?

6. If you were to describe yourself to a future employer what would you want them to know about your work ethic and character?
7. Tell me about your worst customer service experience, how could they have done better?
8. What is your greatest strength?
9. What do you feel is your biggest area that needs improvement? Can you give me an example?
10. How well do you handle change? Can you give me an example?
11. What is your biggest pet peeve at work?
12. How do you feel when someone at work says, That is not my job? Why?
13. If you answered the phone and a customer was angry, what steps would you take?
14. Now... We let them rate themselves for us and we want to see how quickly they can answer which tells us how confident they are in their abilities.
15. Can you rate yourself in the following areas (1-10): Reliable, multi tasking, team player, working in organized chaos
16. What do you need from a company to make a career there?

Job Offer

When they are offered the position, make sure that they have a complete job description so they are agreeing to your expectations.

| | | | |
|--|---------------------------------|--------------------|---------------------|
| Job Title: | Customer Service Representative | Department: | Inbound Call Center |
| Job Purpose: Creating the best customer service experience customers have ever had by applying the principles we practice in our company culture. | | | |
| Reports To: [Direct Supervisor] | | | |
| Job Description: Schedule technicians by taking inbound calls, ensuring customers have the best customer service experience they have ever had while maintaining our database and making outbound calls to fill empty schedule spots. | | | |
| Role and Responsibilities: | | | |

- Serve customers by taking Incoming and making outbound calls to fill each technicians schedule
- Maintain customer database with current information
- Manage customers records and files
- Offer Additional Services on calls
- Resolve conflict with kindness and grace
- Recognize customer's needs and fill those needs
- Clear and concise communications with department Managers, employees and company customers

Skills, Education, and Experience

- Type 50 WPM
- Above Average to Expert Computer Skills Including MS Word, and MS Excel
- Prefer Experience with Dispatching Software (but not a must)
- Track record of Production Success
- Balance multiple phone lines
- Self motivated and organized
- Strong customer first orientation
- Excellent interpersonal communication skills and emotional intelligence
- Great attention to Detail
- Sense of Responsibility
- Excellent multitasking skills
- Ability to stay cool in stressful situations
- Consistently Positive Attitude
- Advanced Customer Service Skills

| | | | |
|---------------------|------|------------|-----------|
| Reviewed By: | Name | Date: | Date |
| Approved By: | Name | Date: | Date |
| Last Updated By: | Name | Date/Time: | Date/Time |
| Employee Signature: | | Date: | |

| | | | |
|--|------------|--------------------|---------------------|
| Job Title: | Dispatcher | Department: | Call Center/Service |
| Job Purpose: Creating efficiency in the service department by organizing scheduled jobs, choosing the best match for service and keeping customers updated all while giving a great experience. | | | |
| Reports To: [Direct Supervisors name] | | | |
| Job Description | | | |
| Role and Responsibilities | | | |

- Maintain the current and on-call schedule for the Service/Maintenance Technicians & Plumbers
- Resolve conflict with kindness and grace
- Flexible in dealing with different people/situations
- Maintain customer database with current information
- Schedule return trips with customers when parts are in
- Clear and concise communications with department Managers, employees and company customers
- Keep the customers apprised of the company schedule and requested lead times
- Recognize customer's needs and assist them
- Manage customer records and files
- Prepare service invoices and time-cards for processing
- Answering company phone as needed
- Teamwork

Skills, Education, and Experience

- Minimum of 5 years Dispatch Experience
- Type 50 WPM
- Geographical Knowledge of Service Area and Map Reading Skills
- Above Average to Expert Computer Skills Including MS Word, and MS Excel
- Prefer Experience with Dispatching Software (but not a must)
- Capable of balancing multiple phone lines
- Strongly Prefer Candidates With a Track Record of Production Success
- Go Getters and Goal Setters
- Self-motivated
- Organized
- Demonstrates a Strong "Customer-First" Orientation
- Excellent Interpersonal Communication Skills and Emotional Intelligence
- Great Attention to Detail and a Sense of Responsibility
- Excellent Multitasking Skills
- Talented in "Staying Cool" in Stressful Situations
- A Consistently Positive Attitude
- A High Degree of Integrity
- Advanced Customer Service Skills

| | | | |
|---------------------|------|------------|-----------|
| Reviewed By: | Name | Date: | Date |
| Approved By: | Name | Date: | Date |
| Last Updated By: | Name | Date/Time: | Date/Time |
| Employee Signature: | | Date: | |

Onboarding

When onboarding new employees there are key steps we always want to cover. Management should always be a part of the process, this is your most important customer.

1. Have the workspace ready for them before they arrive to the job
2. Add a nice decoration or welcome package to their desk with some swag
3. Introduce them to the team mates they are going to see around the office
4. Show them the company motto as you walk them through key areas of the office
5. Never forget to show them where they can find a restroom and water or coffee (being new is intimidating enough)
6. Complete all necessary paperwork with HR
7. Give them a copy of the training and SOP binder, a notebook and a pen
8. Pair them with a positive peer

Training

Time to start Training...

You will notice we touch 4 learning styles during the training process. Every person we interact with learns a little bit differently. If you use the 4 learning styles you will get less questions that are repetitive giving you more opportunities to make a difference.

Learning Styles

1. **Read/Write:** These employees are the ones always taking notes and writing down call notes on pads of paper. They tend to like to read or reference things they have written
2. **Visual:** These employees have to see it to believe it! They learn better by seeing presentations, visual charts or graphs, like lesson outlines and Love pictures.
3. **Auditory:** These employees need to hear it. They can sit through an 8 hour virtual training session with no powerpoint and take things home to use. They learn best when you read outloud, give verbal instructions and they prefer discussions.
4. **Kinesthetic:** These employees learn by doing. You can talk all day long but they do not have it until you give them a go at it.

How do we incorporate these into training?

- Create a binder we will outline in this manual. One for you and one for them.
- Walk them through each page so you are reading from it while they are looking at it
- Discuss it at the end of each chapter or section
- Make sure they are taking notes
- At the end of the discussion let them do a mock one on the computer and check their work before moving on.

- Keep working that way all the way through the binder and then they keep binder as a reference guide
- send them to listen to calls live with other employees. Here they can repeat the process of listening, then a few calls later entering information and then taking their own call.

Ongoing Reviews and Performance

To prepare for reviews we want to make sure we do our research first. Contact any team leads or supervisors to see what feedback they have to offer. Write it all down and have your portion of the interview written down before the employee is in front of you. This helps in making sure we touch all points and our conversations (even when challenging) are based on facts instead of feelings.

Review Intervals best Practice

- 30-60 days after hire date:
 - Review Job Description given at hire
 - Have the employee rate their ability to do each task
 - Ask how we can support them better
 - How could we improve training/onboarding
 - Create an action plan to learn the things they need more support in before 90 day
- 90 Days after hire date:
 - Have them rate the company/Leadership/experience
 - Let them tell you how they did on their action plans from previous meeting
 - Go over strengths and weaknesses
 - Discuss ongoing employment
 - Where do they see themselves a year down the road with your company
- Annual Review
 - Ask for direct feedback on each touchpoint (managers, peers etc)
 - Have them rate their skills on each area of their job description
 - Anything below a 9, how can we help support?
 - If they do not catch something, bring it up by going over strengths and opportunities such as timeliness or upsells.
 - Create any necessary plans of action based on conversation
- Plan of Action Performance Reviews
 - Come prepared with everything you want to go over no matter how small
 - Remind yourself before the meeting, "How do I want them to feel after this?"
 - Always provide the effect of the behavior instead of just "because I told you so"
 - I notice X, and it is causing Y, what are your thoughts?
 - Guide your employee to come up with a plan of action instead of creating one yourself which creates buy-in.

KPIs & Employee Bonus Pay

Here are the six essential metrics to track in your call center:

1. Number of calls taken/made
2. Number of appointments scheduled
3. Booking percentage
4. Service agreements sold
5. Average talk time
6. Average time before answer

Additional Income Opportunities **(Must be easy to track)**

- Agreement Sales:
 - \$10.00 New sale
 - \$5.00 Renewal
- 3% of sale on outbound leads for new installs
- \$5.00 for each add on service they sell (filters/plumbing/UV light/Duct Cleaning)
- \$5.00 per Review posted
- Monthly \$ bonus to hit conversion rate goals

Keeping Your Call Center Excited

Working in a call center is a monotonous job where it can be easy to feel defeated or lose energy quickly. To keep everyone focused on the goals you create and have fun doing it, try little games and contests.

- Gift drawers: Collect gifts from your dealer representative and use them for bonus or incentive ideas | Purchase small gifts of household and office things. Create a drawer in the office where when someone reaches a goal or does a good job they can choose anything out of that drawer.
- Raffles: makes a list of things that they can do to earn a ticket such as help a coworker, book an outbound call, train a new employee, pitch an agreement the tech sells, receiving customer compliments etc. Then do a drawing at the end of the month. If the whole team gets more than so many tickets you can draw over a pizza lunch.
- CSR of the month: Give specific requirements and choose a CSR of the month. Buy a large trophy and whoever is CSR of the month would get to have it on their desk until the next person is chosen. Take a picture of them holding the trophy and hang them up in the hallways where leadership can see.
- Pegboard Balloon Pop: Fill balloons with air after sticking prizes inside like, cash, notes, an early day, lunch with boss etc. When you need things improved or additional

calls, announce it to the team daily and let the winners choose a balloon to pop. At the end of the day they can trade gifts if they want someone else's.

- Decorating contests: Holiday cubicle decorating contest where CSRs will bring in decorations and do up their areas. Company wide they will vote on it and a prize will be given before that holiday. Additions to this: pumpkin carving, potluck presentation for thanksgiving
- Monthly birthday celebration where you bring in a cake with everyone's names who has a birthday, we all sing together
- Christmas tree with paper ornaments on it that have a prize written on the back- same as balloons but more holiday centric.
- Leaderboards: large white board with a team goal on it and then add names in a leaderboard fashion for friendly competition to reach the whole team goal.
- Announcements: For every service agreements sold we can ring a bell that is away from their desks or manager does a silly dance
- Clothespin game: Similar to the baby shower game, everyone starts the beginning of their day with so many pins. Once they learn the lesson on how not to say no, every time a coworker hears them say a "NO" word they can take a pin from them but only if they can tell them how they could have said it the PSP way. Winner has the most pins at the end of the day.

Outbound Campaigns:

To Keep in touch with your customer base throughout the year, you can:

- Happy Calls where we can bring up recommended work, agreements, reviews
- Previous customers with no work for 6 months or more
 - New products
 - Inspections
- Service Agreement renewals, scheduling and check ins
- Systems over 12 Years old
 - New financing offers
 - Set lead for sales
- Sales Calls not sold (use rehash example)

Best Practice for Outbound Calls

1. 1st call: Call during normal business hours, leave message if needed
2. 2nd Call: Call between 5:00-7:00 PM, leave message as needed and text
3. 3rd Call: Call on the weekend and if still no answer send an email with an embedded coupon to schedule

Other methods we can use to keep in touch with our customers

1. Newsletters to your clients that are seasons with
 - a. Maintenance tips

- b. Home energy tips
 - c. New things at your company
 - d. Introduce new technicians or office staff
 - e. Keep it fun with normal everyday things like videos
2. Email Campaigns to your customers that go out randomly throughout the year

Service Titan Walkthrough Videos/Screenshots - How to Pull Reports

Creating Call Center SOPs

We want to make an SOP book that stays on each desk in the call center including the manager (to reference during one on ones) and a spare copy for training. Each SOP book will get updated at the same time when things change and no one but the manager should be able to write in or on the binder. We highly recommend in the world of digital EVERYTHING, that this binder be printed for easy reference when your team has their monitors loaded with call taking screens or dispatch boards.

First page: Company purpose/motto

First tab: Service

- Corresponding call flow
- Best practice questions
 - Is there any air coming out of your vents?
 - What is the current temperature in your home?
 - How many systems do you have in your home? (If more than 1: What area does the one cover)
 - What is the age of your unit?
 - If over 10: Have you had similar concerns with this unit before?

- Screenshot of Call Taking screen with highlighted boxes of needed information

The screenshot shows a 'Search for customer' interface. At the top, there are search fields for Name, Street, Unit, and ZIP Code, along with a Phone field. Below this is an 'Overview' section with dropdown menus for Job Type, Business Unit, Marketing Campaign, and Priority. It also includes date pickers for Start Date (3/11/2022) and Start Time, and a 'Get Availability' button. At the bottom, there are fields for Technician and Client Availability, a 'Summary' box, and buttons for 'Close and classify', 'Build estimate', and 'Book job'.

- Screenshot of what format you want notes in so that they are uniform across the board making it easy for dispatch and technicians to work through customer needs

Example:

For a no Cool on a system over 10 years old:

\$89: NC/15 Years Old 1/2 units- System blowing hot air/Temp 85

Gold member- needs renewal ATOS

For a no Cool under 8 years old:

\$89: NC/5 Years Old 1/1 unit- System blowing hot air/Temp 85

No Membership

- Bullet point list of service choices they will see in drop down and any explanations needed
- List of what you consider non bookable/bookable and why

What happened?

Call Reason

| |
|--------------------------------------|
| Called for office staff |
| Called for office staff |
| Calling about services offered |
| Customer called to cancel |
| Customer wanted price over the phone |
| Don't Provide Service Needed |
| Follow up call |
| Hang up |
| Happy Call |

- Area map for service techs

Second Tab Maintenance

- Repeat above steps
- Best practice questions
 - Is everything keeping you comfortable at this time?
 - No agreement/info in system: How many units do you have in your home?
 - What is the age of your unit?
 - Promotion Minds: Is anyone in your home currently suffering from allergies or asthma
- Add the maintenance agreement but highlight bullet points for easy viewing

Third Tab Sales

- Repeat above steps
- Best practice questions
 - What led you to want more information on replacement?
 - Is everything working okay at this time?
 - How many units do you have in your home?
 - Do you experience unusually high utility bills?
 - Do you know the approx age of your unit?

Third tab Angry Callers

- Repeat above steps
- Toolbox of things we can use without seeking your approval

Keep Repeating these tabs for anything that is a different department/script or process such as outbound.

Fourth tab Additional Info

- HVAC term definitions (find on google)
- Diagram of how a system pushes air and part names (google)

Fifth tab Specials

- Add all current marketing flyers, mail outs and internet coupons