

PROVIDING EXCELLENT CUSTOMER SERVICE

ResultsSM

powered by CALL SOURCE[®]

*Answering the phone,
Closing the call*

The CallSource Purpose

To enhance performance,
accomplishments, and results for
individuals and organizations in
work and life.



ResultsSM

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Phone Scripts For Success

Protecting your investment

You don't get a second chance to make a good first impression. So while it's the ultimate introduction to your company, the manner in which the phone is answered is often under-utilized as a sales tool. In order to maximize incoming opportunities, everyone within the organization should be trained to properly field and forward phone calls.

The starting point of a selling cycle is a prospect's call for assistance. This is where contractors can marginalize or lose a sale, in essence, inviting prospects to call competitors.

Effective call handlers will be knowledgeable, personable and possess the ultimate skillset to set appointments, while leaving a strong and viable impression with the caller. Anything less robs your company of revenue. It's estimated that every call costs \$100-\$500 to generate, so assuring they are professionally handled protects the company's investment. The average employee knows how to take a message, but has no idea how to set an appointment. This can be detrimental since the best time to set an appointment is on the initial contract.

Know the basics

Obtain the lead source. Always ask the prospect what prompted him/her to call. The source of the lead is important: acknowledging the ad source continues the momentum of your marketing message, as well as defines and measures what marketing sources are the most effective, whether print, electronic, referral, Web or other media.

Gauge the strength of the lead. Identifying the lead source provides necessary knowledge to set an appointment. Some leads are easier to convert to appointments than others, and some lead sources are better than others. As an example, referrals are easier to convert to appointments than Yellow Page leads. Remember, knowledge is power.

Never quote price on the phone. You can't possibly close a sale on the phone, so providing pricing only commoditizes your product and marginalizes your value proposition out of context. Without proper information-gathering, and the ability to match up a relevant sales presentation in the presence of all decision-makers, there is no sale. An in-home appointment, with all decision-makers present, is critical to making a sale.

Call Excellence

- Answer by the third ring
- Greet the caller
- Give your name
- Ask the customer how you can help



Effective call answering

1. Answer professionally
 - Before the third ring
 - Identify your company and name
2. Gather information on
 - The nature of the problem
 - Customer's name, address, and phone number
3. Track advertising
4. Set a specific appointment
5. Reassure the customer you'll do a great job and earn his/her business
6. Use a pleasant voice in a non-hurried manner
 - No matter how busy, or how bad a day you may be having
7. Smile when answering the call
 - You will be surprised at how different you sound
8. Early in the conversation, write down the customer's name and use it at least three times during your conversation

Three rings is the generally-accepted standard for answering the phone. After the third ring, customer tolerance starts to waiver, and doubt begins to form. Consumers interpret an unanswered phone to mean your company is too out of control to deal with the basics such as picking up a ringing phone, your company is understaffed, your company is out of business.

When taking an incoming call, keep the following key points in mind:

- Are they an existing customer?
- Obtain the prospect's name, address, phone numbers and email address.
- What is the nature of the problem and why are they in need of heating and/or air conditioning system?
- For what type of equipment is the customer searching?
- How did they hear of your company?

Create a script

A script delivers a consistent message and assures the customer that you will meet his/her needs, thereby eliminating the opening to call the competition. Although a script is a recommended value-added tool, the call shouldn't sound canned. It needs to be practiced so it sounds sincere. Your goal is to make the prospect feel they are getting personalized attention.

DO

- Provide your company name
- Provide your name
- Ask for the customer's name
- Speak clearly and concisely
- Attempt to set an appointment
- Ask how the customer got your company name
- Build value in your company and product
- Be a good listener
- Allow the customer to schedule the consultation at his/her convenience
- Use please and thank you
- Go out of your way to help
- Advise the customer of current promotions: utility rebates, financing specials, etc.
- Ask questions

DON'T

- Put the customer on hold before they speak
- Eat, drink, chew gum while talking
- Quote a price over the phone
- Get too technical
- Put the caller on hold for more than a minute
- Expect the customer to be on your timeline
- Assume the prospect can't afford the best
- Get off the phone without attempting to set the appointment at least twice
- Treat the customer differently if they choose not to set an appointment. They are still a prospect. Thank that they let you know if they need anything else.
- Say, I don't know. Find the answer or someone who knows, even if it means calling the prospect back
- Give the impression that there is something more important than his/her call
- Ask the prospect to call back

for accuracy.)

3. And your phone number, starting with area code?
4. Would you mind if I asked you a few questions about your home? Ask the following questions:

- Type of installation?
- Square footage of home?
- Does it need ductwork?
- Approximately how old is current system inside? Outside?
- Interested in what type of units?

- If unit includes heating, is it gas or electric?
- Are you interested in financing?
- Is there an alternate daytime or cell phone number where you can be reached?

Great greeting examples

Thank you for calling (company name). This is (your name), how may I assist you today? Other examples:

1. Thank you for calling Los Angeles County's leading Comfort Specialist dealer, Value Heating and Air, this is (your name), how may I help you today?
2. Thank you for calling Value Heating and Air, home of the \$600 consumer rebate. This is (your name), would you like to schedule a free comfort system evaluation?
3. Thank you for calling Value Heating and Air Conditioning, this is (your name). May I offer you a free in-home, no obligation consultation from San Clemente's leading Comfort Specialist dealer?
4. Thank you for calling Value Heating and Air Conditioning, faithfully serving the needs of Coachella Valley residents for the past 22 years. This is (your name), how may I help you?

When a prospect calls to request a consult

Optimal response: We'd be happy to have a comfort consultant come to your home and perform a no-cost, no-obligation consultation. Then continue with the following:

- Are you the property owner? If the response is "yes," continue with questions below. If the response is "no," say: I apologize. However, it is required that the property owner be present for the consultation. Therefore, we would need the property owner to contact us to set up the appointment.
- How did you hear about us?
- Is your current system operational?

Data entry on a request for consultation

1. May I get your first name? And your last name? May I call you (your name)?
2. (your name), may I get the property address? (Read it back

Selecting a date for the home visit

Use these scripts if the caller's system is not operational:

- *Business hours:* The consultation takes about an hour, possibly more, depending on your questions and concerns. To remedy this situation as rapidly as possible, we recommend that two decision-makers be present for the consultation. What's a convenient day and time for you?
- *Non-business hours:* The consultation takes about an hour, possibly more, depending on your questions and concerns. To remedy this situation as rapidly as possible, we highly recommend all decision-makers be present for the consultation. I will send a technician out to your home right away to help minimize your discomfort.

Use these scripts if the caller's system is operational, is new construction or they are calling regarding an addition:

- The consultation takes about an hour, possibly more, depending on your questions and concerns. What is the most convenient day and time for you? And an alternate day and time in case the first day isn't available?
- (prospect name), you'll be receiving a call from our comfort consultant within the next 24 hours to confirm the exact appointment

The 4-step Call

1. Greeting
2. Address the request
3. Data entry
4. Closing

time. Is there anything else I can do for you at this time?

- Thank you for calling (company name). Have a great day!

Closing the call

Here's how you might close a call culminating in the prospect setting an appointment: (prospect name) we realize you have many options for your heating and cooling needs. We appreciate the opportunity to provide a proposal for service. Once again, my name is (your name). If you have questions, please don't hesitate to call me. Our comfort consultant will be contacting you shortly. Thank you for your time. Have a great day!

Answering a prospect's service request

We are more than happy to send a service technician to your home to service your unit.

1. May I get your first name? And your last? May I call you (prospect's first name)?
2. (prospect's name), may I get the property address?
3. And your phone number, starting with area code?
4. Now ask the following questions:
 - What is the age of your equipment?
 - What brand is your equipment?
 - What type? (i.e. furnace, heat pump, etc.)
 - What is the nature of the problem?
 - What is your scheduling preference, morning or afternoon?

Note: Remember to call the customer the day of the appointment to remind them of the impending visit.

Be sure that you or a technician (depending on your company structure) review the following with the customer:

- Billing rates
- Terms and conditions, method of payment whether COD, billed or otherwise
- Approximate window of time for service
- Possible trouble shooting steps

Gathering data

(name), our technician will contact you within 24 hours to confirm your appointment day and time. You will want to discuss the cost of the service call when he/she contacts you. I would like to give our tech your preferences for an appointment.

What is the most convenient day and time for you? And an alternate day and time in case the first is not available?

We will do everything we can to accommodate your requested appointment times, and you will receive a call from the service technician shortly. Thank you for calling. Have a great day.

Should a consumer request pricing

Because each system is designed to meet your specific needs, we are unable to provide advanced pricing over the phone. Would you like to schedule a no-cost, no-obligation home consultation?

At the second request for a price:

It is impossible to determine your needs over the phone, however, I am sure we can design a system to meet your needs and budget. Would you like to schedule a free in home consultation?

At the third and final request for a price:

If prospect continues to demand a price, ask a series of questions starting with easy ones and gradually work toward hard questions until the prospect doesn't know the answer. When he/she don't know the answers, explain that this is the reason we need to come to your home.

Easy questions

- What is the square footage of your house?
- Is your attic insulated?
- Are your walls insulated?
- How many people live in the house?

Harder questions

- What is the ampage of the electrical service?
- What is the pitch of your roof?

Do you have gable vents in your attic?

- If this is a replacement lead, ask the size of their ducts.
- What size is your air conditioning unit?
- What is the horsepower of the blower motor?
- What is the BTU rating of your furnace?

If the prospect won't let you come to the house, disregard the lead: Ok, well, if you change your mind give us a call back. My name is (your name) and I'd like to thank you for calling (company name). Have a great day.

Entering a request into the system

1. May I get your first name? Your last name? May I call you (prospect's first name)?
2. (prospect's name), may I get the property address? (Read it back for accuracy.) And your phone number, starting with area code? Would you mind if I ask a few questions about your home? If you are unsure of the answer, that's OK. Our service technician can determine some of these answers once there.
 - What type of installation does your home have?
 - What is your home's square footage?
 - Does it need ductwork?
 - Approximately how old is the current interior system? Exterior system?
 - In what type of system are you interested?
 - If unit includes heating, is it gas or electric?
 - Are you interested in financing?
 - Is there an alternate daytime or cell phone number at which you can be reached?

Closing statement

(prospect's name), we realize you have options for your heating and cooling needs. We appreciate the opportunity to earn your business. Once again, my name is (your name). If you have any questions please don't hesitate to call me. Our comfort consultants will contact you shortly. Thank you for your time. Have a great day!

Protocol for placing a customer on hold

When placing a customer on hold, keep in mind the following points of telephone etiquette:

1. Ask customers if you may put him/her on hold.
2. Avoid at all cost the “can you hold,, click” method.
3. Wait for a response. As soon as the prospect agrees to hold, respond with “thank you” before placing the line on hold.
4. Tell customers why they are being placed on hold. Most customers are patient if they are politely informed why they must hold. Most people find it easier and more comfortable to wait on hold if they have a mental picture of what the service provider is doing while away from the phone. Provide pertinent information such as:
 - Getting the answer to your question will take a few moments because I need to consult my leader.
 - I need a minute to get the correct file.
 - I need a moment or two to check with another department.
5. Give a time frame. If you know that the wait time will be brief, you can say something as casual as, “this will take a few moments.” For long wait times, one to three minutes, which is an exceptionally long period, it is a good idea to give an accurate estimate of the hold time and to double check that the wait will be acceptable. For example, “Mrs. Jones, I will need a couple of minutes to address this properly, would you care to hold, or do you want me to call you back?”
6. Always thank the prospect for holding after you return to the line.

Choose your words wisely

What you say to prospects and customers can make the difference in success and failure. Here are business phrases to avoid because they drive prospects crazy and kill the chance for business.



Value-added Words

What we can do • Proposal
Opportunity • The best
solution • Total investment
OK • Initial investment • Own
Share • Agreement • Approve
Endorse • I misspoke
Concerns • Fee for service



Kill words

No • Bid • Quote • Estimate
Deal • Pitch • Problem • Sold
Price • Cost • Down payments
Monthly payment • Prove
Contract • Sign • I'm wrong
Objections • Commission
Buy • Total price of the job

Save the deal phrases

- I'll find out
- What I can do is this...
- I'll try my best
- I'm sorry
- I'll be with you in just a moment
- This is who can help you...
- I understand your frustration
- Let's see what we can do about this
- I can help you
- I will call you back

Kiss-the-sale good-bye phrases

- I don't know
- No
- You want it when?
- Calm down
- I'm busy right now
- That's not my job
- You're right. It stinks!
- That's not my fault!
- You need to talk to my manager
- Call me back

HVAC reference guide

When representing your company to the customer, conveying the proper message will help shore up the deal and solidify credibility in the customer's mind. Painting a professional image of co-workers and services your company offers enhances this process.

We say leader, not manager or supervisor

Co-worker, not employee

Customer service representatives, not girls in the office

Comfort consultant, not salesperson

Service technician, not repairman

Installation technician, not installer, helper

IAQ technician, not duct cleaner

Precision tune-up specialist, not maintenance man, helper, apprentice

Precision tune-up, not inspection, clean and check

Energy savings agreement, not maintenance agreement, pm or service contract

Tighten, adjust, clean, monitor, not check and inspect

Challenge, not problem

Work with, not work for

Involved, not sell

Cash on completion, not cash on delivery (COD)

Getting RESULTS from proper phone etiquette

- More leads booked
- Higher closing rates by your comfort consultants
- More business for your dealership
- Better follow-up
- Happy customers
- More referrals
- More sales

About CallSource®

Celebrating its 20th year, CallSource helps businesses improve their marketing, sales, operations, management, and training, and has trained tens of thousands of employees. The company has evaluated literally millions of calls and helped companies across the U.S. and Canada make critical, information-based decisions resulting in increased ROI and improved employee performance. With carrierclass networks in Burbank and Chicago, CallSource manages nearly 2,000,000 toll-free and local tracking numbers for more than 350,000 unique business locations. We are an established, financially stable company with an experienced management team that is fully committed to our expansion and long-term success.

I love CallSource. Since we have started using CallSource we have been able to really monitor our advertising. The ability to listen to all calls has been an added tool in many ways. CallSource offers an internal tool to evaluate our CSR and see exactly where we are strong and where we need work. They are more like a partner offering valuable information and input.

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