

CallSource[®]

Scoring Criteria

Home Services



Prospect Call Scenarios:

Prospects represent potential new revenue

- A completely new first-time customer with a repair/service or estimate request.
- An existing customer with a brand new repair/service or estimate request.
 - pricing/estimate request
 - repair and service calls
 - new unit installations
- commercial/industrial new prospect calls



Appointment Set:

All prospect call scenarios that result in an appointment for a specific day and time, or a sale being made over the phone:

- General information calls that result in an appointment or sale
- Existing customers calling for a brand new service, estimate, or unit that results in an appointment or sale.
- Appointments that get "scheduled" but not confirmed (i.e. "We have you on the schedule for tomorrow but I will have to confirm with the technician and call you back with the exact time")
- Calls in which a landlord gives permission for the office to call a tenant directly to schedule an appointment
- Answering service calls where an appointment is scheduled



No Appointment Set:

Any prospect call scenario that does not result in an appointment or sale as well as the following scenarios:

- New prospect voicemails - the fact that the caller is a new prospect must be clear within the voicemail
- New prospect written message (taking the name and number of the caller and having someone else call them back)
- Answering service calls where the representative advises the customer to call back during business hours

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Not Applicable:

- Answering service calls where the caller is advised the “office will call back to set an appointment” OR the “technician will call back”
- Any “parts” calls (filters, thermostats, etc.)
- Any service contract/maintenance agreement calls (whether they already have one or want to purchase one) because there is no revenue
- Appointment cancellations, reschedules
- Callers from “out of service area”
- Callers with problems or types of units that the company does not service or repair
- If the caller is not the property owner the call will be N/A

Examples:

- Tenant calling in with or without landlord approval
- Realtor calling on behalf of a client
- Customer looking to purchase a property
- Repeat callers within a short time period (anyone that has recently had contact with the company) - because they have already been classified as a new prospect from the first time they called.
 - Someone calling back from being disconnected is considered a prospect call.
- Warranty calls- because there is no new revenue