

CSR

DEMAND SERVICE



ANSWER TELEPHONE

- Within two rings, please

"It's a great day at (Co. Name), my name is (Your Name). I can help you."

- Be sure voice tone is upbeat and friendly
- Listen to the Customer's response and make notes



SEARCH

"May I get your name and address, please?"

- Search for Customer by Name and/or Address on System
- If Necessary Search by Telephone Number

"(Name of Customer) May I get your area code and phone number?"



FOUND

CREATE TICKET

- Create Ticket on System
- IF OPEN TICKET - GO TO OPEN TICKET

"To be sure I've understood...I've recorded your problem as [repeat problem]. Is this correct?"

- Key Problem Code

"(Name of Customer), I have a technician available for you on (day and time). Will this be an acceptable time? [Wait for response]"

- GO TO Cust Type ==> STD, USA, WARR, or A/R Over 60



NOT FOUND

CREATE NEW CUSTOMER

"In order to complete your call, may I take a moment to verify some information?"

If necessary....

"Would you mind spelling your name for me please?" [Key In]

"...and your address is?" [Key In]

"...city, state, and zip-code are?" [Key In]

"(Name of Customer) you said your phone number was...?" [Key In]

"May I get a work number?" [Key In]

If Center wants to utilize...

"We would like to send you a confirmation of this call by email?"

May I get your email address?" [Key In]

GOTO CREATE TICKET



DETERMINE CUSTOMER TYPES

STANDARD

“(Name of Customer), did you know you can qualify for a 15% discount on this service call through our USA Agreement program? This program provides two precision tune-ups per year and guarantees you priority service.”

“In addition, the regular diagnostic price of (\$Amount) is applicable toward the USA Program price which is only (\$Amount) more.

[Adjust to Co.Policy]

Ask our service technician, he/she can go over the USA Program with you.”

Will you be paying by check or credit card? [Key “How Pay”]

GOTO HOW DID YOU HEAR?

USA SERVICE AGREEMENT

“(Name of Customer), I see you have a USA Service Agreement with us. As you know, this entitles you to a discount up to 15%, with no overtime charges and priority service.”

“Will you be paying by check or credit card?” [Key “How Pay”]

GOTO HOW DID YOU HEAR?

WARRANTY

“(Name of Customer), I see you have an active warranty on your (Type of equipment).”

“I will be sure to notify your technician.”

GOTO HOW DID YOU HEAR?

A/R OVER 60 DAYS

“(Name of Customer), our records show an outstanding balance of (\$amount). Is this correct?”

Can we take care of that now through your credit card?

- Fill out Credit Card Slip with amount paid, date of transaction, name on credit card, credit card number, and expiration date.
- Proceed per Co.Policy

“Thanks for taking the time to help me straighten that out, (Name of Customer)”

“Will you be paying this call by check or credit card?”

GOTO HOW DID YOU HEAR?

OPEN TICKET

“(Name of Customer), I see we have a service call already scheduled. Is this correct?”

“Could you give me a moment to research this?”

View tickets at bottom of screen.

LOOK UP OPEN TICKET - Reconcile with customer

“Thanks for taking the time to help me straightened that out. (First Name), I have a technician available for you on (day and time). Will this be an acceptable time?”

Will you be paying by check or credit card?

[Key “How Pay”]

GOTO HOW DID YOU HEAR?

HOW DID YOU HEAR?

CSR

PRECISION TUNE UP



ANSWER TELEPHONE

- Within two rings, please

"It's a great day at (Co. Name), my name is (Your Name). I can help you."

- Be sure voice tone is upbeat and friendly
- Listen to the Customer's response and make notes



SEARCH

"May I get your name and address, please?"

- Search for Customer by Name and/or Address on System
- If Necessary Search by Telephone Number

"(Name of Customer) May I get your area code and phone number?"



FOUND

CREATE TICKET

- Create Ticket on System
- IF OPEN TICKET - GO TO OPEN TICKET

"(Name of Customer), I have a technician available for you on (day and time). Will this be an acceptable time?"

[Wait for response]

- GO TO Cust Type ==> STD, USA, WARR, or A/R Over 60



NOT FOUND

CREATE NEW CUSTOMER

"In order to complete your call, may I take a moment to verify some information?"

If necessary....

"Would you mind spelling your name for me please?" [Key In]

"...and your address is?" [Key In]

"...city, state, and zip-code are?" [Key In]

"(Name of Customer) you said your phone number was...?" [Key In]

"May I get a work number?" [Key In]

If Center wants to utilize...

"We would like to send you a confirmation of this call by email? May I get your email address?" [Key In]

GOTO CREATE TICKET



DETERMINE CUSTOMER TYPES

STANDARD

“(Name of Customer), have you considered our USA Agreement Program? It provides two precision tune-ups per year, and entitles you to a 20% discount on all repairs, and guarantees you priority service.”

“In addition, the regular tune up price of (\$Amount) is applicable toward the USA Program price which is only (\$Amount) more.”

Adjust to Co.Policy

“Ask our service technician, he/she can go over the USA Program with you.”

“Will you be paying by check or credit card?” [Key “How Pay”]

GOTO HOW DID YOU HEAR?

USA SERVICE AGREEMENT

“(Name of Customer), I see you have a USA Agreement with us. As you know, this entitles you to service discounts up to 20%, with no overtime charges and priority service.”

“We currently are having a sale on (sale item). Your technician can give you the details when he/she arrives.” [Adjust to Co. Marketing Programs]

GOTO HOW DID YOU HEAR?

WARRANTY

“(Name of Customer), I see you have an active warranty on your (Type of equipment). I will be sure to notify your technician.”

GOTO HOW DID YOU HEAR?

A/R OVER 60 DAYS

“(Name of Customer), our records show an outstanding balance of (\$amount). Is this correct?”

Can we take care of that now through your credit card?”

- Fill out Credit Card Slip with amount paid, date of transaction, name on credit card, credit card number, and expiration date.
- Proceed per Co.Policy

“Thanks for taking the time to help me straighten that out, (Name of Customer)”

- IF NOT Prepaid USA Agreement

“Will you be paying this call by check or credit card?”

GOTO HOW DID YOU HEAR?

OPEN TICKET

“(Name of Customer), I see we have a tune up already scheduled. Is this correct?”

“Could you give me a moment to research this?”

View tickets at bottom of screen.

LOOK UP OPEN TICKET - Reconcile with customer

“Thanks for taking the time to help me straightened that out. (Name of Customer), I have a technician available for you on (day and time). Will this be an acceptable time?”

IF NOT Prepaid USA Agreement

Will you be paying by check or credit card?

[Key “How Pay”]

GOTO HOW DID YOU HEAR?

HOW DID YOU HEAR?