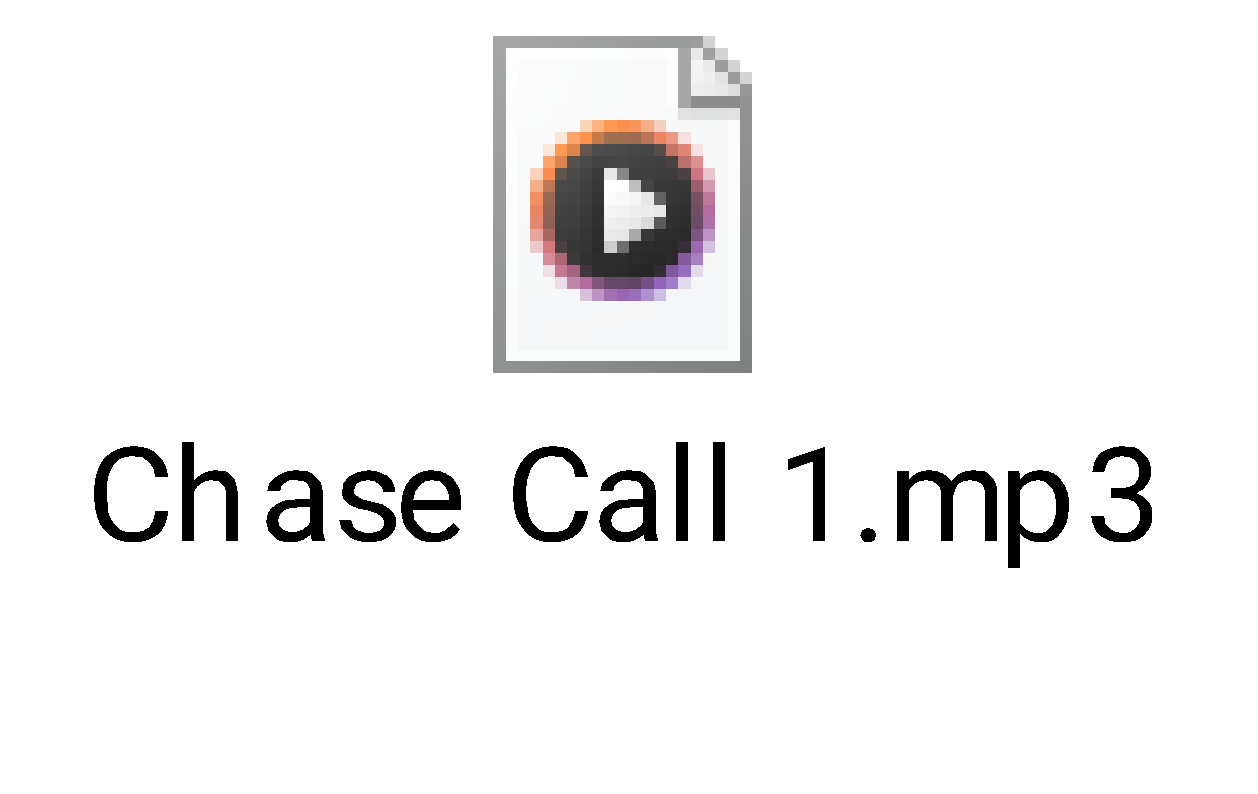
**CSR Call Examples:**

**Description:**These calls will be graded under the pretense of correct usage of the script, as well as the same grading criteria we use during the CSR meetings. Calls will be graded fairly on a 10pt scale.

### **Chase Buning**

**Call #1 – Cx: Dale Weaver – Excellent (9.5/10)**This call really highlights Chase’s ability to keep a cx on the line and sell the job. He covers the standard greeting but he could improve his enthusiasm. This critique would be specific to the greeting itself just because his tone drastically changes in a positive way as the call progresses. This call was a little tricky to grade based off the script, solely because the cx continued to ask questions which altered the direction of the call rather than the standard call we promote. Chase did an amazing job of maintaining the points we like to get across within our calls and just when I thought it was going to get off track, Chase actively worked his way back into those main points. Overall, this call was excellent. He does a great job with branding, overcoming cx objections, and building rapport with the cx.

[[](https://go.servicetitan.com/Call/CallRecording/428620583)](https://go.servicetitan.com/Call/CallRecording/428620583)

**Call #2 – Cx: Katie Corder – Excellent (9.8/10)**After listening to this call, there were a couple of things I noticed Chase does that I think could help other CSRs in training or in the overall improvement of the quality of service we provide. Starting with the verbiage he uses in this call, the cx mentions the referral she received, and the response Chase gave was golden: “We do specialize in glass replacement, and we definitely do work with those wooden grids.” A response like this definitely eases the mind of the cx with any form of doubt that the work is done properly and efficiently. He does this many times throughout the call, to the point where she paid the assessment fee without hesitation. I did notice a couple things he could improve; I will reiterate the improvement of tone in his greeting. Secondly, as a company we do like to promote confidence within selling the job, and although he was confident with the booking, he did stutter quite a lot giving the notion of lack of confidence. Overall, this is a good example of what we like to see at Glass Doctor.

[](https://go.servicetitan.com/Call/CallRecording/428095247)

**Call #3 – Cx: Tina Caldwell – Great (9.3/10)**

In this call, Chase provides a perfect example of what it is to ask clarifying questions. He was able to come to an educated consensus that he was able to provide to the cx, as well as the technician, on what the problem is or might be. This helps with the avoidance of putting the cx on hold and bugging someone else to figure out what it is that’s going on. He didn’t do too much branding as he typically does but was still able to comfort the cx through confidence in the information he gave on our production of the glass. He does waive the assessment fee due to the fact that she was a returning cx, but I feel like the attempt to collect it, for Glass Doctor’s sake, should have been implemented. Overall, this call was great. Again, his ability to converse and reassure the cx is unmatched, as well as the use of those clarifying questions is what we as a company like to see.

[](https://go.servicetitan.com/Call/CallRecording/427370491)

**Call #4 – Cx: Catherine Clement – Good (8.5/10)**For the sake of keeping the grading consistent, this call seems to be all over the place considering the call script we have in place. Nonetheless, as a salesman, the conversation he makes with the cx seems fitting. He does take large amounts of time to get personal with the cx, which by no means comes off as a bad thing. He adjusted to the attitude or personality of the cx as she seemed like someone who would enjoy the conversation, which I believe helped in securing the cx to give us a call back to get this set up. But what brought this call over the top was his salesmanship when talking about the difference between annealed and tempered glass. He gave her multiple suggestions and reasons on why this would work and how this would benefit her office space. Overall, this call was good. He ultimately didn’t get the booking, but he showed great salesmanship as well as great conversation skills, though he did go in and out of the script we have in place.

[](https://go.servicetitan.com/Call/CallRecording/424371061)

**Call #5 – Cx: Alicia Cutter – Excellent (9.8/10)**I would classify this call as short and sweet. This follows our script quite literally to the T. The call only lasted minutes and he was able to get the deposit with no backlash or questioning, which I believe stemmed from the continuous promotion of the quality of work we provide. I did notice the initial lack of empathy on her troubles towards the beginning of the call, but if it wasn’t for that small detail, I would have classified this as a perfect call. Overall, this call was excellent. Aside from that lack of empathy, he covered each of our main points in detail and was able to collect the assessment fee from the cx.

[](https://go.servicetitan.com/Call/CallRecording/423002674)

### **Kaitie Rolls**

**Call #1 – Cx: Catherine Champon – Excellent (9.8/10)**Kaitie does an amazing job with sticking to the script in this call; she covers branding through the explanation of our warranty process as well as mentioning the training of our specialists towards the end of the call. Her nurturing tone throughout the call and her confident attitude is what we look for when talking about confidence. Although the cx did say that she didn’t have her card available after the mention of the standard $35 assessment fee, Kaitie offers a great solution of collecting this on site, giving that perfect example of what it looks like to overcome any cx objections or obstacles. Typically, we should be looking for more empathy after the cx states their problem. I think she could’ve improved in this aspect, but again her tone throughout the call provided somewhat of an alternative for this. Overall, this is an excellent example of following the script as well as building value.

[](https://go.servicetitan.com/Call/CallRecording/427624682)  
**Call #2 – Cx: Meridith Casey – Excellent (9.9/10)**Another amazing call format from Kaitie. Continuing the grading criteria of following the script, she does a wonderful job bringing in those points that we really push for as far as branding and the extra push for the sale of other work we can do. One thing I do want to point out is her use of clarifying questions and the confirmation of information at the start of the call — something that avoids problems for this job later on. In this call, the cx had changed addresses, so a simple confirmation can easily avoid any confusion on where we’re sending out our specialist to. I’m sure the process of updating the information made it easy for Kaitie to overlook that empathy we look for, but that is something Glass Doctor would like for us to make evident. This really brings out the type of care that we show to our clientele. We want our cx’s to feel like they are in good hands — because they are. Overall, this call was near perfection. She did an excellent job in following the steps of our script without making it seem so robotic.

[](https://go.servicetitan.com/Call/CallRecording/427466762)  
**Call #3 – Cx: Micah Henry – Perfect (10/10)**This would be a wonderful call to demonstrate what it is to use our script. Taking into account that not all cx problems are the same and that conversations will not always look like this — but typically, if we follow the standard, most calls will be this efficient and quick. This leads into my next point: this call was just under 4 minutes. Kaitie was able to not only push our branding but get the job booked while collecting the assessment fee and gathering all the cx’s information. We may not mention this much, but we try to limit the amount of time we have the cx on the phone. Again, this is depending on the situation at hand, but typically calls should range anywhere from 5–7 minutes, and even then, this might be a little overboard. Overall, this call was perfect. It followed the script perfectly and efficiently.

[](https://go.servicetitan.com/Call/CallRecording/427142654)

**Call #4 – Cx: Brian Burrows – Excellent (9.9/10)**Kaitie does a great job of following the script quickly and efficiently. Although she doesn’t share that salesmanship that Chase shows, she is still very good with incorporating the other services that we offer that help with the additional sale of other services. She shows great strength in her ability to provide information on what it is that we do as a company. She doesn’t show too much branding in this specific call, but generally, she does this very well throughout her other calls. Overall, this is near perfection as she seems to have gotten the verbiage down for the script we have in place.

[](https://go.servicetitan.com/Call/CallRecording/424435195)

**Call #5 – Cx: Chris Mesa – Excellent (9.6/10)**Kaitie didn’t do too much branding here, but she did include some points throughout the call. What I would take away from this call: even though she did confirm the cx’s information before finishing the call, typically we like to make sure we confirm that information at the **start** of the call. This gives us time to really see:  
1.) The scheduling date specific to the business unit  
2.) Confirmation through Google Maps whether it is a residential home or not  
3.) Update any new information that needs to be updated  
She does this later in the call, but if we were to follow the script, this is to be confirmed or set up toward the beginning of the conversation. Overall, Kaitie shows amazing skill in staying on script and certifying the booking through collecting the assessment — ultimately making this an excellent call.

[](https://go.servicetitan.com/Call/CallRecording/423161370)

**Danny Espiritu**

**Call #1 – Cx: Doug Bui – Needs Improvement (6.9/10)**This call generally did follow the script but has many points to improve on. The opening was standard and lacked the empathy that we push for in these calls. This is a great way to connect to the cx and initiate a form of relationship, encouraging them to continue to work with us. The big points to focus on in this call were the lack of mentioning the assessment fee. This is something we push for, as it costs the company $150 for us to go anywhere. Danny not only did not collect the fee but also did not even mention it. Another area of improvement would be branding. There were multiple opportunities within the call where he could have built confidence in the cx by giving an overview of the services we offer and reiterating the company name. We look for these points of marketing as they help the cx remember our name and the excellent service we provide. Overall, this call showed the need for improvement in many areas. Building off of these opportunities is what differentiates us from other companies.

[](https://go.servicetitan.com/Call/CallRecording/428921220)

**Call #2 – Cx: Alexander Zunita – Needs Improvement (7.2/10)**This call was similar to the previous one — missing the points of mentioning and collecting the assessment fee, and failing to build on opportunities to brand and build rapport with the cx. With just these two main points, it creates the bulk of what we would like to hear from our CSRs when answering a call. Danny did mention the company name toward the end of the call, but we would like to optimize those empty spaces (awkward pauses) with ways to push our company brand. He did use some clarifying questions which helped with understanding the cx’s issue, which we love to see. Overall, Danny did improve from the previous call, but by failing to even mention the assessment fee, this call falls below the standard of what we like to see from our team.

[](https://go.servicetitan.com/Call/CallRecording/428651602)

**Call #3 – Cx: Stanson Stokes – Okay (7.9/10)**This call displays a lot of improvement compared to the others. Danny may not have collected the fee, but he did the bare minimum of mentioning it to the cx. Of course, we are still pushing for collection, as it secures the spot for our cx and encourages them to get the job done with us. But nonetheless, the mention of the fee is a definite step up. He did a great job covering empty spaces, including the offer of other services that we provide. Lastly, he closed it off with the brand name, sealing the booking. The cx seemed content and appreciative of the service Danny provided and seemed inclined to get the replacement through us. Overall, this call was a good example of the script. He could definitely improve with the verbiage of setting up scheduling as well as more branding, but he did a good job of covering the main points.

[](https://go.servicetitan.com/Call/CallRecording/428476706)

**Call #4 – Cx: Clay Conn – Okay (7.5/10)**This call was another okay call from Danny. We can always find ways to improve, but the main points were covered. With bookings, we like to confirm the information we already have on file, just to make sure everything is accurate. Danny does this at the start of the call, which was great. However, he did not show much empathy toward the cx’s problem. He attempted to fill in the empty spaces by talking about Glass Doctor, which is what we like to see when managing those dead spaces. He was able to collect the fee and assume the sale. Overall, this call was good. Although there was a little dead space, Danny attempted to fill that time by promoting our brand. He did forget to mention Glass Doctor at the end, which creates an area of improvement.

[](https://go.servicetitan.com/Call/CallRecording/428216768)

**Call #5 – Cx: Donald Whitley – Needs Improvement (6.7/10)**This was an untraditional call. Of course, we still refer to the script, but the direction of this call made it difficult to follow step by step. This call was still filled with long pauses of silence — a time we could use to speak more about our company and build trust with the cx. The main focus here is the lack of collecting payment for the estimate. Before we can even schedule a customer pickup — especially for a rescreen — we must build out an estimate, collect payment, and then send it to the operations manager for scheduling. This process typically comes later in CSR training, but it's always good to have a general idea of what the correct process looks like. Overall, this call could have definitely used improvement.

[](https://go.servicetitan.com/Call/CallRecording/428011131)

### **Hayden Rodd**

**Call #1 – Cx: Karen Koenig – Excellent (9.8/10)**This call was another untraditional call that you won’t see until later on into your training. It was for a windshield repair, which typically is handled by one of our auto team members. Either way, Hayden does a great job with following the auto script and sending it over for scheduling. He was able to give the flat rate we charge and collect the half down for the job. Overall, Hayden did an excellent job following our process and quickly took care of the cx’s problems.

[](https://go.servicetitan.com/Call/CallRecording/428184859)

**Call #2 – Cx: Denelle Hevron – Good (8/10)**Hayden did a good job in getting this cx to go ahead and get his glass needs taken care of through us. He followed the script step by step and showed persistence when overcoming cx objections. He does show empathy for the cx, reiterating his sorrow throughout the call and quickly jumping into scheduling. A critique that could elevate this call would be the mentioning of our accolades and ensuring the cx of our ability to service him better than any other company in the DFW area. Overall, Hayden shows familiarity with the script and does a decent job creating it his own.

[](https://go.servicetitan.com/Call/CallRecording/375162407)

**Call #3 – Cx: Jo Pizzimenti – Great (9.5/10)**This call is another perfect example of what we love to see from our team members. Hayden is very well versed with the script and is very good at reeling in the cx. Although the fee was not collected, the tone Hayden takes has a compassionate feel, and his reassurance and vocal empathy clearly show understanding and a willingness to solve the issue. He flew through the scheduling flawlessly, and his ability to change the cx’s mind even before waiving the fee — which just sealed the deal — is exactly what we want from our CSRs. Overall, this call was an exemplary illustration of a perfect call.

[](https://go.servicetitan.com/Call/CallRecording/423346973)

**Call #4 – Cx: Frank Goodrich – Good (8/10)**This is another good call from Hayden. He covers every point in the script and has amazing cx retention. Every time the cx wants to get off the phone or opt for another company due to the assessment fee, Hayden works to retain the booking. He reassures the cx by mentioning we are a preferred company and have been in business for 40+ years — a great way to instill confidence. Overall, this was a perfect example of branding, empathy, and overcoming objections. Note**:** He did give incorrect pricing info. The $300–$600 ballpark is for glass replacement on a double-pane window (size A–C), not the entire window.

[](https://go.servicetitan.com/Call/CallRecording/421363862)

**Call #5 – Cx: Jason Horton – Great (9.0/10)**Hayden’s step-by-step process follows the script perfectly and allows him to book quickly and efficiently. He missed some things that he later improved on. He forgot to vocalize empathy at the beginning — one could argue his tone implies it, but we do want it vocalized. Normally, Hayden is great with branding, but this call lacked it. He did close with the traditional outro. Overall, this was a great example of what we love to see from our CSRs.

[](https://go.servicetitan.com/Call/CallRecording/378722809)