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**CSR Booking Playbook**

*When customers call for help, we are here to make them feel Glass Doctor will take care of them. By setting up their work orders/quotes, asking clarifying questions, and taking an efficient path to solving problems, this script is the backbone of our customer service process.*

*\*Following all verbiage exactly is not required, however, there are areas where mandatory verbiage is labeled with* **LARGE BOLD INDICATORS***.*

Service Titan - CSR FLAT JOB CALL SCRIPT

1. Power Greeting: “Glass Doctor, we fix your panes! This is \_\_\_\_\_”
   1. ***Start your calls with high energy and a confident voice!***
2. Fix the Customer & Add a Reassuring Statement
   1. Assure the Customer of their right decision to contact us
      1. “I am sorry you are having to deal with that! We would be glad to get you taken care of. ***Is this for a home or business?”***
3. Move to Customer Info Grab:
   1. “Let me get you set up with an appointment, what is your First and Last Name?”
   2. ***"Is this for the house you live in?”***
   3. Note: If this is for a contractor/residential landlord, search for the company name on file before setting up a new account.
      1. “Do you have an account with Glass Doctor? What is the name of your company?”
      2. “Thank you for the call today, we would be glad to be your source for all glass needs!”
4. Select Customer Account
   1. No Account popped up? Click Create New Customer
5. Notes & Clarifying Questions
   1. Scroll to the bottom of the Call Screen, Use Summary field
   2. Converse with customer about their Issue
      1. Mandatory Questions
         1. ***“How did you hear about Glass Doctor?”***
         2. ***“Tell me about [their issue]. Where is it located?”***
         3. ***“Do you have a due date for getting this done?”***
         4. ***“We also offer screens and showers. What else should we look at for you?”***
   3. Broken Window Glass
      1. Are they exposed? ***Offer Same Day assessment for exposed customers $100 assessment fee***
   4. Note Formatting
      1. Due Dates
         1. “Needs 10/3, moving out 10/4”
         2. “No due date.”
      2. If cx asks us how soon we can do it, ask how soon they need it (assure them we can meet their deadline)
         1. CSR: ***“How soon do you need it?”***
      3. For contractors having us schedule and meet tenants/homeowners on site
         1. “Do not discuss pricing with homeowner!”
         2. Meeting with \_\_\_\_\_\_\_\_\_\_\_ (someone else/tenant)
         3. “Meet with wife”
         4. “Vacant house – Lockbox 6574#”
6. Decide: (a) Schedule or (b) Send text for photo quote
   1. Schedule
      1. “**We are scheduling for \_\_day or any day after, is that soon enough for you?**”
         * 1. ***Our routes run between 7:30 and 5:30pm, what hours can you be available?”***
           2. *Make sure you are putting notes on when the customer is available in the summary. Set the operations team up for success*
   2. Collect Assessment Fee
      1. Assessment Fee Ask-  ***“To get you on our schedule and guarantee your appointment, we require a $\_\_\_ assessment fee. This will go towards the cost of any work we do. What type of card may I put that on?”***
      2. Resistance
         1. “We have limited number of specialists, and their schedules build up quickly. This fee guarantees your spot on their route.”
         2. NOTE: ***If further resistance, you have the option to waive the deposit if the appointment makes sense to send a specialist out there.***
      3. If Waiving Deposit (Book Job & Skip to Recap What’s Next)
      4. If not Waving Deposit
         1. Click Close & Classify Call
         2. Send customer the phone text template
            1. Glass Doctor here can you please send the following information so we can get you a quote as quickly as possible.  
               1.) Photo of the window  
               2.) Approx. Sizes  
               3.) Double Pane or Single Pane  
               4.) Clear or LowE/Energy Efficient glass (green or blue hue to it)
      5. Recap What’s Next
         1. Verbiage
            1. ***“Okay, the day before you will receive a text confirmation with a tighter timeframe of arrival. On the day of, you will receive a 30-minute heads up when we are on the way.”***
         2. Build Rapport-

***“All our specialists work directly for the Glass Doctor and are not subcontracted.***

***“Our specialists drive marked Glass Doctor Truck and will show up wearing Glass Doctor uniforms”***

***“We offer no interest financing options, if that is something you are interested in, please let our specialists coming out to you know.***

* + - * 1. “You are all set. Thank you for calling Glass Doctor!”