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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. Listen to Initial Customer Blurb: “Yes, I have a broken window. Can you help me?”
3. 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?”***
4. Select Matching Call Bubble on Service Titan (ST)
5. 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!”
6. Select Customer Account
   1. No Account popped up? Click Create New Customer
      1. Fill out information of the Job Location
         1. NOTE: If Business Account, add Name and Office Address (for the Bill To), then create a second Location (Job Location)
      2. Label as Residential
   2. Account Popped Up? Find the correct Customer and Job Location
7. Choose Job Location (NOTE: You must Select a Location to continue)
   1. If Location not found, Select Customer and Click Add Location at the top of the screen
      1. NOTE: Enter the correct shop location for Customer Pickup Orders
8. Notes & Clarifying Questions
   1. Scroll to the bottom of the Call Screen, Use Summary field
   2. Converse with customer about their Issue and notate appropriately
      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?”***
      2. Questions Depending on Issue
         1. Broken Window Glass
            1. Are they exposed?

“Is it broken all the way through so air is coming in?”

* + - 1. Big Project
         1. Why do they need this done now?
         2. What is their budget?
      2. Shower
         1. New Enclosure/Door

What design are you looking for? (frameless or framed)

* + - * 1. Repair

NOTE: Write down what specifically the shower is not doing properly.

* + 1. Note Formatting
       1. Adding Headlines – First line of Job Summary
          1. Some aspects are more important than others
          2. Examples

Due Dates

CSR: “Do you need this done by a certain day?”

If cx says there is a due date, make a note

“Needs 10/3, moving out 10/4”

If cx does not have a due date, note

“No due date.”

If cx asks us how soon we can do it, ask how soon they need it (assure them we can meet their deadline)

CSR: ***“How soon do you need it?”***

If cx is asking how soon we can do it without giving a due date, tell customer our process

CSR “Once our specialist gets there to assess what you need done, he will write up a quote. Once approved, our scheduling team will reach out in 2-3 days to schedule your install.”

For contractors having us schedule and meet tenants/homeowners on site

“Do not discuss pricing with homeowner!”

Meeting with someone else

“Meet with wife”

“Vacant house – Lockbox 6574#”

1. Decide: (a) Schedule or (b) Send text for photo quote
   1. Schedule
      1. Scroll up to the Overview section
         1. Fill out all fields and Schedule in the appropriate timeframe (NOTE: Check Schedule Slack for updates)
            1. You, “**We are scheduling for \_\_day or any day after, is that soon enough for you?**”

**MANDATORY VERBIAGE**

* + - * 1. Customer says, “Yes, that works. What time?”
        2. You, “Great! Our routes run between 7:30 and 5:30pm, what hours can you be available?”
        3. Customer, “Does 8:00am work?”

When a cx does not give you their open hours, ask them their earliest and latest availability

* + - * 1. You, “Sure, is that the earliest you can be available?”
        2. Customer, “Yes.”
        3. You, “And what is the latest you can be available?”
        4. Customer, “I have to leave at 1:00pm.”

NOTE: End Arrival Window 30 minutes prior to customer leave time. Ex. 12:30pm.

* + - * 1. You, “Great! Thank you for being flexible.”
      1. Advanced: If customer does not give a three-plus hour window (as preferred by Schedulers)
         1. You, “Our Schedule team does need a three hour window to place you on a route. Is there another day you have more availability?”
         2. Customer, “I can either do first thing in the morning or after I get he from work at 4:00pm.”

How to Schedule

For a customer only available at the start or end of the day

Set Timeframe to 7:30-8:30am

Add HEADLINE NOTE: “Cx also free after 4pm.”

For a customer available most of the day

Set timeframe to 7:30-5:30pm

Add HEADLINE NOTE: “Must avoid 12-2pm!”

* + 1. Collect Service Deposit
       1. Deposit Ask
          1. You, “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

Customer, “Why do you need a deposit?”

You, insert Value Points

You, “We have limited number of specialists and their schedules build up quickly. This fee guarantees your spot on their route.”

Customer, “Okay, it’s a Visa.”

NOTE: ***If further resistance, you have the option to waive the deposit if the appointment makes sense to send a specialist out there.***

See manager for more

* + - 1. If #1 = Yes
         1. Click Book Job
         2. Click Invoice (upper right)

Select Add Task (left side)

Find SD\_\_ Task and Add

Click Collect Payment

Insert any card type and the amount

Click Charge (bottom right)

Insert Card Number, Expiration, CVV, and Zipcode

Check “Save Card Info”

Click Charge

* + - * 1. Click to Job (upper left)
      1. If #1 = No
         1. If Waiving Deposit

Book Job

Skip to Recap What’s Next

* + - * 1. If not Waving Deposit

Click Close & Classify

Classify Call

***-----DONE-----***

* + 1. 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!”
        2. ***-----DONE-----***

Clarifying Questions Per Scenario

* Single Panes (broken)
  1. Most times we can replace sameday
  2. Ask if customer is exposed: “Is air coming in?”
     1. If yes, offer SAMEDAY SERVICE ($100 deposit)
        1. Notate rough size and frame type
        2. Schedule Verbiage
           + “We can set this up as a Sameday Service where we will come out today to secure the opening. Most times, our specialists have enough glass on their trucks to complete this in one visit. Are you available throughout the rest of today?”
        3. Deposit Ask Verbiage
           + “To get on schedule and guarantee your appointment, we require a $100 service deposit. This will go towards the cost of your work. What card may I put that on?”
* Double Panes
  1. Broken
     1. Ask if customer is exposed: “Is air coming in?”
        1. If yes, offer SAMEDAY SERVICE ($100 deposit)
           + Notate rough size and frame type
           + Schedule Verbiage

“We can set this up as a Sameday Service where we will come out today to secure the opening. Most times, our specialists have enough glass on their trucks to complete this in one visit. Are you available throughout the rest of today?”

* + - * + Deposit Ask Verbiage

“To get on schedule and guarantee your appointment, we require a $100 service deposit. This will go Tesoro’s the cost of your work. What card may I put that on?”

* 1. Knowledge: Some customers believe we will replace just the one side that’s broken
     1. This is a temporary fix because the unit’s seals will not last long
     2. We replace full glass units (inside and outside panes) for a long-term solution
        1. Explain to customer if asked
* Showers
  1. Need just an adjustment or leaking?
     1. Charge $75 SERVICE DEPOSIT
  2. Need new one?
     1. Ask if tile work is done (required before measuring)
        1. If Yes, WAIVE SERVICE DEPOSIT
        2. If No, Charge $35 SERVICE DEPOSIT
* Tabletops
  1. Quotable over phone
     1. Pricing Tabletops spreadsheet
  2. If it’s an edge finish other than Flat Polish (Pencil, Bull Nose, etc.), 2.5x price from spreadsheet
     1. This does not involve Bevels.
  3. If it’s a major pattern (not normal rectangle shape), we will need a Final Measure
     1. Either customer can bring table to a shop or we can come to them (no extra charge unless we are delivering
  4. If Need Delivery
     1. Add Task for 60 Minute Labor (adjust to $125)
        1. ¼” Thickness or Under
           + Up to 2,304” (48x48”)

Add ONE Labor

* + - * + Between 2,305” to 5,041” (71x71”)

Add TWO Labor

* + - * + 5,042” and Above

Confirm with Area Manager

* + - 1. Thicker than ¼”
         * Up to 1,296” (36x36”)

Add ONE Labor

* + - * + Between 1,297” to 3,600” (60x60”)

Add TWO Labor

* + - * + 3,601” and Above

Confirm with Operations Team

Special Notes

* Notate special timeframes in Job Summary
* Notate specific due date in Job Summary if the customer mentions one

Value Building Points

* “Make sure to check out our 1,800 Google Reviews after this call! Nobody else in DFW has as many satisfied customers as we do!”
* “Our Lifetime Warranty covers the glass if it fogs up again. You won’t have to pay to replace it. Other glass companies may have warranties, yet the majority don’t clover the most expensive part of the job, labor. You are protected with us!”
* “The good news for you is we have a lifetime warranty on fogged glass. If this happen 3, 4, or 5 years after install, we will come out and replace the glass for no charge!”
* “You will get a 30 minute heads up with a GPS tracking link, so you know where we are. Our specialist will show up in his uniform and marked vehicle at your front door.”
* “We have been locally owned and operated for 20 years. Nobody around can match your experience with a specialist who wears shoe covers, gloves, and cleans up after the job is done.”
* “If you’re selling your house, we provide paperwork as proof the work is being done. You can show this to buyers if they they need it!”
* “After being in business 20 years, we have more vendor buying power than anyone. If you are on a time crunch, we will be the best to handle it!”
* “You will have a dedicated Account Manager in the Office to ensure your are satisfied with your job.”