

JAKE

The Service Call Journey

Alright, guys. We're gonna go over the service call journey. Okay? So remember, we're expensive, because we have to be to stay in the business, and so we need to provide as much value to the customer as possible. Okay? And so the way we handle a service call has to do a lot with providing maximum value to the customer, okay? So let's just go through what the entire service call process looks like. So it's gonna start with a phone call or a form fill from your website, okay? You're going to want to make sure you get that phone answered or make sure when there's a form fill on your website, it goes to the email of your CSR and you're calling them back right away, okay? Or if somebody reaches out to you on Facebook, you're getting back to them as soon as possible. And then you're getting that job booked, okay? And ultimately you wanna get the job booked for today, okay? Today is like the magic word in plumbing business. If you can get to somebody right now today, you have a lot of power in your hands, okay? And we're gonna go over scheduling, like the actual scheduling and how that looks to actually schedule people for today. But just know, you wanna get the job booked, okay? CSR's main job, book the job, okay? Once they book the job, then they're going to send a technician there. They're going to assign a technician to the job and they're going to say, hey, your next job is going to this customer. That technician is then gonna, you know, go to the house. Once you get on service Titan, that's gonna automate a process where the homeowner gets a text message and a picture of the technician coming and a little bio. Very powerful again. It's part of the quality service that you're offering to the customer, right? Building value before you ever get to the home. Okay? Once the technician gets there, he's gonna arrive at the job. He's going to go meet with the customer and we're going to go over that in greater detail as well. And he's going to diagnose the issue and then provide the customer with an estimate. Okay? And then at that point in time, the customer is going to have two different options. They're going to say yay or they're going to say nay. Okay. So if they say nay, then we want to charge them a diagnostic charge. Okay. So my company charges the \$96 diagnostic charge. It's part of our service fee. So if we go to your house and you don't like our estimate, then we will try to talk you down. We'll try to give you a discount and we'll go over that later in sales 101. But then ultimately, if you decide not to purchase from us, it's a \$96 diagnostic charge. And that just covers coming out to your house, taking a look at your problem, and providing you with options to fix them. If the customer says yes, then we wanna do the work right now if at all possible, okay? So that's like a lot of the power of getting them to say yes is like, hey, I can take care of this right now, what do you think? Do you wanna go ahead with this option? Right? And a lot of times, just because you can do it right now and most plumbers, they're going to have to wait a couple days or they're to have to get scheduled again. Just the fact that you could do it right now, they're going to say yes a lot more often than they're going to say no. Okay? And so then you're going to do the work. You're going to do it right now. If you got to go get parts, you're going to tell the, homeowner, Ms. Jones, Hey, I got to go get some parts. I'll be right back and I'll get this taken care of for you today. Okay. And then as soon as you're done, the most important part is you want to bill the customer right away. Okay. So eventually you're going to be on service Titan. You're going to be able to swipe credit cards right away. If you're on something else currently, hopefully you can bill a

customer right away. A real easy way to do that is just straight through QuickBooks. That's how my company rolled for quite a while. We just build our customers out through QuickBooks. My guys would write their estimates on paper, bill them in QuickBooks, and we get paid today, okay? That way you get that money in the bank tomorrow and you don't have cash flow issues, all right? So in any way, even if you just give them a diagnostic charge, they're gonna bill that out right away. They're gonna write the invoice and they're gonna bill the customer out today. Okay? So that's kind of what the service call needs to look like. And then we're gonna go over some more details in the next courses. See you over there.

Diagnostic Charge

One thing you're gonna wanna start doing when you're scheduling out your calls is you're gonna wanna start charging a diagnostic charge, okay? And so all this does is it qualifies the customer, okay? So it's a charge to go out to their house, to look at what they've got going on, and then to provide them with options, okay? With an estimate on how to fix whatever's wrong with their plumbing, okay? And it's kind of similar to like going to a doctor. You go to a doctor, you go in for your first visit, they kind of diagnose your issue, and then they reschedule you usually to come back and get it fixed. And they charge you for that visit, okay? So you're kind of doing the same thing with your plumbing customers. And what this does is when your CSRs are on the phone, and we're gonna go over the phone script next, when they say, know, there's a \$96 diagnostic charge, but if we do any work, we'll waive that fee. Then the customer, if they're a really cheap kind of customer who just wants bottom dollar price, right? And they're not willing to pay you \$96 to come out and give them an estimate to fix their plumbing. Well, they're likely not gonna wanna spend a bunch of money with you, right? Because we've gone over, you know, it's expensive to be in the plumbing business and in order to make a profit, have to charge a lot of money and you have to offer a premium product. But the fact of the matter is there's people in this world who they don't want the premium product, okay? And what it boils down to is those people just aren't your customers, all right? You're gonna find that there's people who just don't appreciate quality. They don't appreciate premium product and they won't want to do business with you. And so the diagnostic charge is a real quick and easy way to just weed them out without wasting your time of going to their house and giving them an estimate, right? Because that can take a whole hour out of your day and if you're not charging any money for it, you're leaving with zero, okay? So weeds them out and then the ones that you do get to and you charge them \$96 then at least you made \$96, okay? And so the amounts that you charge for the diagnostic charge, you know, you can, you want it to be enough to where it kind of weeds them out. And then you don't want it to be so much that it weeds everybody out. Right? And so for my company, we found that \$96 is a really good one. We started at, I think, dollars 45, but we found that people were willing to pay the 96. And so why not charge 96 rather than 45 and get a couple extra bucks, right? We found it didn't really hurt our conversion rate or any of that kind of stuff. And so start charging a diagnostic fee and what you're going want to do, the way you're going to want to structure that is when you go to the customer's house, you know, they know based on your phone conversation that there is a \$96 diagnostic fee or charge. And what you're gonna wanna do is you're gonna wanna provide them with estimates to get their plumbing fixed. And you're gonna say, waived diagnostic on every single estimate, right? \$96 value, \$0, okay? And so basically you're gonna waive that fee if they do any work with you today. All right? So go

start charging a diagnostic. You'll find that you'll make more money this way. You'll qualify the customer and it's gonna be really good for your business.

How We Answer The Phone

All right, let's talk about answering the phones. Okay? This is something that guys, you should not be doing yourself because you are gonna be the worst person that can possibly do it. Okay? You're gonna be giving everybody discounts, telling them you'll get there as soon as you can, making yourself work late, overbooking yourself, all that kind of stuff. Okay? So, first things first, hire this out. Okay? It's literally one of the easiest hires you can make. It's the cheapest hire you can make. And it's one of the first hats that you can get rid of. This was the first hire that I had in my business, and, I think a good judge of when to hire this out is when you're getting regular phone calls, So when you're booking one to two jobs a day, if you're priced right, which you should be at this time, you should have gone through the pricing section, you should be priced right. And if you're getting one to two calls a day, then you should be hiring out somebody to answer your phones and run your schedule. Okay. That's gonna free up a ton of brain space in your life and you're gonna be able to focus more on just being a technician. Okay. So then you can go get more work done, put away more cash, and then you can really focus on growing your business. All right? And you'll have that cash to invest back into your business. So if you're at that point and you haven't hired this out, just go hire it out. Okay? Because no customer, when you're at their house, wants you answering your phone in the middle of a service call. And no customer that's calling you wants you to answer your phone, driving around in your van or in the middle of a service call. They want to hear somebody that's professional and sounds like a legit company answering the phone. So if you just hire somebody to do that, you automatically get that appearance of having, you know, a legit person that answers your phone and you look like a legit company, a real plumbing company. Okay? And that's what you're going for. You wanna be a real plumbing company. So just hire it out, get it over with, and then you can have somebody answer the phone for you. Okay? And so we're gonna go over, how to have that person answer the phone. So in our example here, this is Tanya. My CSR's name is actually Tanya. So this is how she answers the phone at my plumbing business. Okay? And this is how you guys can do it as well. And this is like a foolproof way to answer the phones. And so she says, hello, Prospector Plumbing and Heating. This is Tanya. How can we help you today? Right? And you want them to be friendly and bubbly. You don't wanna hire somebody that is kind of a grump. You want them to be a nice, energetic, friendly person. Okay? Because this is the first touch point with your business. And if it's a grumpy one and it's not a very pleasant experience, then the customer's not gonna have a very good taste in their mouth. Okay? So after this point, after you say this first phrase here, it really doesn't matter what the customer says. Okay? You always want to respond. Sure, we can help you with that. Have we done work for you before? Okay? And the customer will let you know yes or no. And then you're gonna get their information. You're gonna enter their information in your system or write it down or however you're doing that right now. Maybe you're gonna look up the customer information. If you've got it, you're gonna say, Hey, I've got you pulled up here. Tell me a little bit more about what you got going on. Okay? And so the customer's gonna say, I've got this problem and that problem and this plumbing problem. And this is where you want your CSR to really sympathize with them, which is why you wanna hire a woman, because women are way more sympathetic. Sympathize with

them, know, if they call in and say, hey, I've got no hot water, woke up this morning without hot water, I can't take a shower, I need to go to work. Man, I really hate it when that happens. Sorry, ma'am. Know, probably don't wanna say ma'am, but your girls will know how to respond. I have an opening between today between twelve and two. Does that work for you? And the customer's gonna say, yeah, that's great. Or they're gonna say, no, do you have anything later? You can have a later time frame, whatever you need to agree on a time frame. And then this is where the CSR really needs to take control of the call. Okay? So when they say, yeah, that's great. Your CSR then needs to go, alrighty then, I've got you booked between twelve and two. The technician will text you when he's on the way. Just so you know, we have a \$96 diagnostic charge to come out and diagnose the problem. But if we do any work today, we'll waive that fee for you. See you between twelve and two. Click. And she needs to hang up the phone, okay? That way there's no arguing about the diagnostic fee or what that includes. And if they really have a problem with it, they'll call you back. Alright? So that's how you answer the phone. Like that's how you get your CSR to answer the phone and book jobs. And really the whole goal of your CSR is to book jobs, right? So a lot of guys, when somebody calls for another company, right? Because we get calls all the time for a company called Rocky's Heating Service. People will call, hey, is this Rocky's Heating Service? And my CSRs are, they say, no, but we can help you out today. We've got, you know, open times on the schedule. What do you need help with? Right? And they'll convert that call into a booked call. Okay? So if I was you guys, I would train your CSRs really, really, really push on them. Book the call. Your whole job is to book the call. If you're not booking the call, then we're not getting the, the job done. Okay? And one thing we like to do for our technicians or sorry, our CSRs is we pay them \$5 for every single call they book. So on their, time card, they track their working hours, and they also track how many calls they booked. And then at the end of the week, they get paid for \$5 for every call that they booked during that week.

How to schedule

Alright, guys. Let's talk about scheduling and, you know, the nitty gritty of that and what that looks like. So you're gonna want to schedule in two hour time slots. Okay? And I know in a previous class, we talked about scheduling everybody today. Okay? So here's an example, like if your company had two technicians, right? You'll have these available time slots. This is how we schedule my company. My guys prefer to work eight to four and just eat between jobs when they're driving around. They don't take a lunch most of the time. If they do, they just end up working to 04:30. So when you're scheduling, right? And let's say the purple ones are open jobs and the green ones are jobs that are already booked. They're full. Okay. So when your CSR is looking at this, you know, she gets a call and she can say, hey, I've got an opening between ten and noon, noon to two or two to four. When somebody calls in, you wanna give them your next available time slot. Okay? So you wanna say, hey. I can get you taken care of between noon and twelve. Does that sound good? And if that's a good time, then you follow the phone script and you get them booked between, sorry, not noon and twelve, ten am and noon, right? Now, the average service call takes two hours, right? And so your guys just have to show up to the job anywhere between 8AM and 10AM, okay? So if their 8AM and 10AM job is going into 10:30 or eleven, well as long as they dispatch and show up to this job before noon, then they're going to be on time. Okay? So that gives you some flexibility in your schedule. And then, one thing you might want to keep in mind is

to have your CSRs kind of watch where guys are, and this will be much easier once you're on ServiceTitan. But to kind of watch where guys are, what they got going on. If they notice, hey, they haven't been sent to their, you know, ten to noon job and it's 11:30, you're going to want to call this customer and say, hey, we're running behind. He's likely gonna be there more like, you know, between noon and one, right? And then you might have to look at the jobs that you have scheduled out for the future and say, okay, should probably call these people and see what's up. But you never know, he could come to this second job and it could be a diagnostic and he could be out of there by 12:30 and still make it to his next job. Okay? And so when you're scheduling, like even if you got all these time slots full, you want to start, you want to keep scheduling those people for today. Okay? Because your technician may make it to more than four jobs. Ideally, he would make it to two jobs. I know for my guys, you know, typically do two jobs a day. Sometimes they'll do all four, but typically it's two jobs a day. Okay. And so this becomes difficult when you start getting booked out multiple days, okay? So imagine you're booked out four or five days. I know with our company sometimes we'll get booked out weeks and it gets very difficult to manage the schedule at that point in time because you need to keep the schedule full enough to where everybody always has a job to do. But then you don't want to keep it so full that you're moving a ton of people at the end of the day. Okay? So let's assume like, you know, tech one, he went to his 8AM job and it's an eight hour job. So he's gonna be there all day. So he calls the office and he says, hey, I'm gonna be here all day long. The rest of my jobs, I'm not gonna get to. Well, you could take some of his jobs and give them to tech two, but then tech two calls in at his ten to noon job and he says, Hey, I'm gonna be here the rest of the day, okay? And then you've got four jobs that are already booked. Well, you then need to call all those customers and say, Hey, we're not gonna get to you today, we're gonna have to move you to tomorrow, okay? But I would wait to call those customers until it's getting closer to their time slot, okay? So I would call them, would, you know, I maybe call these guys at like 11:30 and say, hey, or eleven, say, hey, we're, our technicians got stuck at some jobs. They're busy taking care of other customers that are taking a little longer than we expected. We're gonna have to get to you first thing tomorrow morning. Okay? We can get you rescheduled for 8AM tomorrow morning between eight and ten. Does that sound good? And then you can reschedule them for tomorrow. Okay? And then the next day, right? Then you wanna get to those people first. Okay? But when you start getting scheduled out multiple days in a row, that's where problems get in. Right? So if that's happening to you, then you're gonna have a really hard time running your schedule and it's gonna be a total mess and you're gonna piss people off because you're gonna be moving a lot of people and customers don't like it when you move them around. They wanna get taken care of when you told them you were gonna be there. Right? So when you find yourself having to move people around or you're getting booked out multiple days in a row, then that's a good indication that you need to hire another technician like your short technicians. And so ideally you would want to be slightly fat on the labor side so that you can keep your scheduling to where you're getting to people today. Okay? So maybe you've got one guy where you don't even have enough jobs for him. Maybe he's only busy half the day. That's totally okay. You can rearrange for what guy that is every single day. Like if you had four guys and one of those guys every day only did a half day's worth of work, that'd be good because there's gonna be times where lots of work comes in and you're gonna wanna be able to handle that work because that's when the money is made, okay? So start scheduling in two hour time slots and then teach your CSRs

to book everything for today within reason. A lot of times we will, if we're totally full on the schedule, we will book a couple extra jobs and tell them we'll be there in the, you know, two to four time slot. And then if we get a few more in, we might say, hey, we're all booked out today. That doesn't mean that we won't get to you, but there's a chance that we might have to move you till tomorrow. Do you want me to book you for today between two and four or do you just want to get on tomorrow's schedule? Okay. So I always prefer just to be honest with my customer and tell them how, you know, how busy we are and there's a chance we could make it to you today, but it's likely gonna be tomorrow. Do you wanna try for a day or today or do you just wanna stick to tomorrow? Okay? And that keeps your customers a little happier rather than telling them you're gonna be there today and then not making it and having to reschedule them when they didn't expect it. Okay. And that'll just keep your five star reviews higher, you know, rather than getting one star reviews for having them be moved all the time. See you guys in the next class.

Triaging the calls

One thing you're gonna wanna do when you're thinking about your schedule is you're gonna want to start triaging your calls. Okay? So you're gonna wanna come up with a list for your CSRs. That's a list of the calls that we're gonna take like right now. Okay. So you remember on the last video, we talked about the schedule, we're scheduling in two hour timeframes. Well, if somebody calls in and they've got a leaky water heater or a water heater that's not working, then that's a really high dollar job, right? So you might make a couple grand on that job. So you don't wanna put that person off and risk them calling somebody else to come take care of their water heater. You want to get on that job right away. And all of your guys' lists are going to be different based on your area and what's most profitable in your area. Here's a few that we use for my area so my girls know if there's a water heater, if it's a water pump, a pressure tank, or anything that involves a piece of equipment, they say, you know, if it's eight to ten and a customer calls in at 9AM, they're gonna say, yeah, we'll be there in an hour. We'll get to you between ten and noon. Right? And even if the schedule is completely full, they're gonna schedule this water heater next. And then whoever was in that time slot or whoever during the day has the least valuable call, they're going to get moved to tomorrow or later on in the day, okay? So if you can run your whole day like this, I mean, if you got six water heater calls and you scheduled them all out, right? And took all these calls that weren't quite as profitable, you're gonna not make as much money that day. And a lot of those water heaters are probably gonna leave, right? Because it's gonna take you a while to get to them Versus if you have a full schedule and six water heater calls come in and you grab six water heater calls and you get to them today, you're gonna make a lot of money that day. And if those lower dollar jobs leave, it's not as big of a deal as if the higher dollar water heater jobs get done. Okay? So ultimately you don't want to be moving a bunch of people around, but if somebody calls in for a water heater or a water pump or pressure tank or anything that involves a big piece of equipment or anything that's a high dollar job for you and your company, want to get to it pronto so that you take advantage of making as much money as possible that day. Because you're in business to make money and you have to make money to stay in business, and that's just part of being in business and making money, is getting to people that have higher dollar jobs today. All right, so start triaging your calls, give your CSR a list of calls that we need to take today and right now.

CSR Employee Agreement

Alright, guys. This is the CSR section of our SOPs. Okay. And so I'm gonna leave a link to this down below and anywhere I reference SOPs in this entire course, I'll leave a link. But for this video, we're just gonna go over the CSR portion, okay? And specifically the CSR employee agreement, all right? So I like to lay this out for them and you guys can take this and use it for your reference and create your own. This works really well for us. Okay. So anytime we get a new CSR, we walk them through this agreement, then they have access to all of this so that if they ever have questions about their job, they can come back in here and see how things need to be handled, okay? So our CSR employee agreement, we give them the primary goals, okay? Number one, book the call. Number two, triage the calls, right? We talked about booking the call. We talked about triaging the call. Most important part, book the call. Okay. Just get every call booked that you possibly can. Okay. Fill the schedule, offer exceptional customer service, communicate with technicians and the general manager. We use an app called Slack to communicate between the CSRs and the general manager. That's just an app on your computer. It's like a texting app, but it saves a lot of phone calls and emails that take up a lot of the other person's time. That way communication is quick, effective and seamless. Okay? So you guys might wanna check that out. And then manage holiday and after hours phones. At some point in time, you're gonna wanna get an after hours phones process. We'll kinda talk about that later. And then maintain customer profiles, like on service titan, they're gonna maintain the customer profiles. And then secondary goals, they're gonna collect accounts receivable. They're gonna maintain our company email, and they're also gonna handle our social media. Okay? So then you can just kinda go through here like book the call. Okay? Main goal here is to book the call and provide a pleasant experience for the customer. Okay? You'll need to possess the skills to direct the conversation in a way that ends in booking the call, right? Ultimately, customer wants their plumbing problem taken care of, that's why they're calling, right? So by listening to their problem, being sympathetic and booking the call, you're building trust and confidence with the customer. Okay? So book the call, fill the schedule. Okay? So here's a few things that you're going to want them to do if they're filling not you know, if the schedule's not full. Okay? They're going to want to go call past estimates that maybe you didn't sell, maybe offer them a 10% discount, call old customers and just check-in with them, make sure they don't need anything, that kind of stuff, okay? They're gonna maintain customer profiles in ServiceTitan. They're gonna schedule the appointments, right? Here's our time slots, first appointment, second appointment, third appointment, fourth appointment, just like we talked about, okay? And then the call script guys, here's a really important section of this thing, right? So my ladies have this printed out. Actually they have the bottom portion and I'll show you, right? So somebody's gonna call and they're gonna answer, you know, thank you for calling Prospector Plumbing and Heating. This is Tanya, how can I help you today? And customer's gonna say, How much do you charge for this? Or, Do you guys do this kind of work? And it doesn't matter what they say. You can always follow-up with, Yeah, we can help you with that. Have we done work for you before? And the customer's gonna say, Yes or No. You're either gonna get their info or you're gonna look up their info. Then your CSR is gonna say, hey, tell me a little bit more about what you got going on. Or you can reiterate like this said before. So you need a boiler tune up, right? And this is your opportunity to listen and connect with the customer and sympathize with them.

That's the most important part. You need to make that connection. CSR needs to be in control of the calls. She needs to make that connection like, hey, we're just human to human and I'm gonna get you taken care of and make booking the call happen, okay? So customer, I woke up this morning, I don't have any hot water. CSR, oh, I hate it when that happens, okay? That's the connection right there. They just made a personal connection. Yeah, don't know what's going on. Well, I have an appointment available today between twelve and two. Does that work for you? Yeah, that works great. Okay, so then this is when the CSR really has to take charge of the call. This is their, my CSRs have this printed out on their computer. Once they work there long enough, they will have this down packed. They won't even have to think about saying it, okay? Because they're gonna say it on every single phone call. They're gonna say, okay, I've got you down between the hours of twelve and two. The technician will text you when he's on his way. Just so you know, there is a \$96 diagnostic charge. The technician will provide you with prices upfront before doing any work. If we do any work at all that day, we will waive the diagnostic charge. We'll see between twelve and two, thank you, click. And they literally hang up the phone at that point in time, okay? Because if you hang on, they're gonna ask you questions, okay? Whether they have questions or not. They want to feel like they're gonna get taken care of. And when you say, yep, we're gonna be there between twelve and two, see you later, click. They're like, sweet. They're gonna be here between twelve and two, everything's gonna be okay. If somebody has a problem with this diagnostic charge, they will call you back and they'll be like, woah, diagnostic charge, I don't wanna pay that, right? That's how you know that they're not your customer, okay? So then it goes over triaging the calls. You guys' triage calls are gonna be different. Collecting accounts receivable, right? You're gonna want your CSRs to pay attention of what jobs aren't getting billed out because there's gonna be times where technician cannot actually bill the customer and your CSR is gonna have to follow-up on that. So we call them multiple times a day until we get paid, okay? That way we have positive cash flow, okay? That's the lifeblood of your company is positive cash flow. So this is how to check who owes this money in ServiceTitan. Membership billing, we'll get into memberships later on in this course. So we also have them maintain the company email. And that's about it. So then we're going to go over these next sections here in the next few videos. So check out this CSR employee agreement To get to it, you're gonna see this big long list of stuff over here. This is literally the entire SOPs and there's a customer service rep portion of it where you'll be able to get to the CSR employee agreement so that you can go check out that call script and all their job duties and get your CSRs doing some of that stuff.

CSR Time SHEET

Hey, guys. Here's a copy of our CSR timesheet that we use. You're gonna want to, again, click file, make a copy, make a copy of this if you wanna use it. Put your own logo in here. You can update the colors too if you want. But this is the time sheet that we use for our CSRs. As you can see, they get paid biweekly. We put their name here and then we just have them email this to our bookkeeper who handles our payroll. Okay? And then you can see here, they put how many hours they worked and then they put how many booked calls they get. And then down here, it tallies them up. So we can see they've got 65 booked calls for the week. And then the bookkeeper knows to pay them \$5 for each one of those book calls, okay? Plus

their normal hours worked. So if you guys want a copy of this, links down below, go get it and start using it.

How We Handle Call Backs

All right, here's how we handle callbacks, okay? Or warranty jobs, all right? So we keep it extremely simple, okay? This is it right here. Everybody hates a callback, but this is how we do it. Number one, we book the job ASAP. So no matter how full the schedule is, or no matter what we got going on, we book it right now. Because if we have anything that we do wrong, we wanna make sure we go take care of it, okay? That's how you protect your Google reviews, and that's how you make happy customers, all right? If you screw up and you go fix it, and you go above and beyond to fix it, your customers will be happy, okay? So we book the job ASAP, and then we send the tech who is at that last, at the location last, okay? So no matter what that guy's got going on, he ends up having to go back there, okay? There are rare occasions where like if he's in the middle of a really long job, we might send somebody else. Or if a technician has been back there multiple times for the same problem, then we'll send one of our more qualified technicians back to go fix it, okay? But you have to be careful sending the most qualified guy back to fix everybody else's mistakes because that's gonna go to his head and he's gonna get really frustrated fixing everybody's crap. Okay? So you wanna try and have the guy who messed it up, fix it first. And you should be telling your guys, hey, know, all my guys know if they have a technical problem or they don't think they've got something under control, they can always call the general manager and they'll make sure that they're doing it all right, okay? And then if a technician is having repeated callbacks, like it's becoming a problem, we tell our CSRs to let the general manager know, and then our general manager will pull them aside and have a talk with them, okay? And say, hey, you're having a lot of callbacks. We can't have this. It's costing too much money to go back and fix work all the time. Plus we're making a bad name for ourself. And if it continues, then we're gonna have to let you go, okay? We have had to let some people go because they just had an insane amount of callbacks and we couldn't get them to slow down and take their time and do it right the first time. And we ultimately wanna be a company that does good quality work the first time. And so it just wasn't working for us, so we actually let them go. So that's how we call it handle callbacks.

Sending Customers To Collections

Unfortunately, you are gonna have to send customers to collections. Okay? So this is our process that we use to send people to collections. We have a collections agency that we hired that we work with. And most of those collections agencies are gonna have an online portal where you can go in and upload the information, and then they're gonna handle getting collections from that person. So again, if somebody owes us money, we're calling them multiple times a day. Okay? And if for sixty days, we can't get payment on an invoice, then we send them to our collections agency. The bum part about a collections agency is they usually take like 30%, but getting 70% of the money is better than getting none of it, okay? So here's what we do after sixty days of no payment on an invoice. We send the invoice to the collections agency. We tell them, you know, if they're not familiar with their accounts receivable process, they can go back to the CSR employee agreement that we already went over with you guys. And then before sending anyone to collections, we have them go to the general manager and get approval. Okay? Because sometimes things may not

be worth sending to collections. Right? We might only might be for \$200. That wouldn't be worth sending to collections. Right? So we just have the general manager make that final decision. Yep, go ahead and send them to collections. That way there's two eyes looking at it and they'll send them to collections, okay? So again, I used to have a step by step guide here. This is a copy for you guys to use. So you'll want to create your own step by step guide to send people to collections, okay? Usually once you submit them to collections, need to mark them in your, you know, service titan or whatever CRM you use. I would mark them as sent to collections and then you're gonna wanna make sure and tag them, do not service so that you don't accidentally go service this customer again. Alright? So get ahold of a collections agency. Just sign up with an account for them so that when you have to handle and send somebody to collections, you've got somewhere to do it at.

Social Media Management

So we have our CSRs also handle our social media management to an extent. Right? So, we don't want the general manager and certainly I, as the owner, don't wanna be dealing with social media comments, and I also don't wanna be dealing with responding to messages. K? Or banning unwanted users. So we give our CSRs they each have a cell phone, and that's actually the phone they use to answer the phone. And we have them download the Facebook app and then we give them access to our Facebook account via the Meta Business Suite, okay? And we have them, we tell them they are responsible for responding to messages because a lot of people message us on there for work, hiding unwanted comments on any of our posts, responding to comments on our posts because the more interaction you have the better, and then banning unwanted users, okay? And you can do that all on the Meta Business app and it makes it really easy. And then you just wanna make sure that they have their notifications turned on for that app so that anytime something happens on that app, they could respond as quickly as possible.

Google My Business Management

Another thing you're gonna want your CSRs to do is to respond to your Google reviews. K? Good and bad. And to respond to messages on GMB. Okay? So customers can message you directly on your Google My Business, and you don't want those going missed. So we actually download the Google My Business app on their phone, just like we do with Facebook. We turn on notifications for that app. That way they get notified if there's any messages on that app, okay? And then we have them manage reviews through ServiceTitan. So if you have ServiceTitan, you can do that or you can manage them directly on the Google My Business app, okay? Then you're gonna have to train your CSRs on how to respond to bad reviews, okay? So this is how we do it. For a good review, we want to say thank you customer name for the great review. We're so happy you enjoyed. And then something they mentioned in the review would be nice if they have it. If not, you can just say our service. We really appreciate your business and look forward to serving you in the future. So that's just a template that my CSRs can use to respond to good reviews, okay? So then we have two ways they can respond to a bad review as well. You know, if it's a bad review about the cost of the service, we have them say this. Thank you for taking time to share your feedback with us. Say their name. We're sorry that you were not happy with the price. Price is important to all of us, but we learned a long time ago that we would rather defend our prices than defend substandard work. We are diligent to offer our customers options so they can choose what

is best for their home and budget. We hire well trained techs and use only proven techniques, tools, and equipment, which allows us to offer a one year worry free warranty. Right? So all you're doing here is you're not really addressing so much the bad review from the customer. You're showing everybody else who's reading that bad review why you're so expensive, okay? So you're building that value back up, okay? Anytime you respond to a bad review, you wanna think about who is reading it. You wanna think about future customers that might read this and how you respond. The worst thing you can do is get negative and get nasty. Okay. So definitely don't get negative or nasty. Just keep it nice and friendly and then show your value, okay? So if they're mad that you're so expensive, I'm okay with that as a business owner, I don't care if they think that we're expensive. If we did something bad or we offered a bad service, then I'm really concerned. Okay? Those are the kind of things I wanna go back and fix. Okay? So this is how we, you know, respond to bad reviews about price. Okay? So then next we have, if we have a bad review about our service, then, we have a problem. Okay? So thank you customer name for bringing this to our attention. We are sorry, for whatever they mentioned in the review. We'll be reaching out to make this right. Okay? So if we know who they are, then we're gonna let them know we're reaching out to make it right, and we will. We will reach out to them to make it right. Okay? And we'll do whatever we can to make it right. But a lot of times you don't know who it is because they'll have a different name or somebody else will fill out the review. Like you'll have the wife's information, but then the husband will fill out the review, and you can't quite match them up in your system. So if that's the case, we'll say, unfortunately we couldn't find you in our system. Could you please give us a call at (907) 322-5763? That's our phone number so we can make this right. Okay? So you're wanting to make it right and more so you're wanting everybody who reads this review to see that you reached out and you wanted to make it right. Okay? So that's how we do it. You guys could literally just take this and use it in your company. I'll see you on the next one.

Google Local Service Ads Management

Another thing you can have your CSR do is manage your Google local services. Okay? Because you actually have to log in there. You have to respond to messages through there, and then you have to send review requests through Google local services. Okay. So if we get a call and we actually ended up doing the work, we'll mark that we did the work and the job is done, and then we will send a review request. Okay. And my CSRs do all of this. So that's another thing you can have them do. I don't think there's an app. I think you actually have to log in on a browser. That's how we do it. But definitely get them managing your Google local services stuff because it's important to mark which jobs you've done and start getting those reviews on there.

How To Handle Customer Complaints

Okay, guys. This is how we handle customer complaints that the CSRs can't deal with on the phone. Like if a customer just gets really grumpy and there's no moving forward with the CSR, then this is how we handle it. So typically we have we tell our CSRs, hey, if they're complaining about price, then, you're pretty much gonna have to move it on to the GM. If they're complaining about any sort of service or something we did wrong, then we treat it like a callback and we book the job right away and we get back there and we take care of them, okay? If they're just mad about the price and they're just being unreasonable, then

they will Our CSRs will say, you know, I'll have to send this on to my manager to get you taken care of. Let me get your information passed on to the GM. He'll reach out to you shortly. Okay. So unfortunately, you're gonna have customer complaints and you're gonna have people that are mad at you. Okay. So as much as you wanna make everybody happy, it's just not gonna happen. Okay. So when a customer calls in with a complaint, tell your CSRs, handle it as best you can. If you absolutely can't handle it and it needs to move on to the general manager, these are the steps we use, okay? So they tell the customer, I'll have to send this on to my manager to get you taken care of. I'll get your information passed on and our GM will reach out to you. Sorry for any inconvenience. Thank you. See you later, basically. Okay. So then we send them an email. Okay. So the second they get off the phone, the CSR will send them an email. They will BCC the general manager. We tell them make sure and use BCC not CC. That way the person responding doesn't see that it's gone to Eddie, our general manager. They'll just see that it's coming from our office email, which is infoprospector plumbing. Okay? So we have them copy paste this email. It says, hi, they replaced the customer name. I'm so sorry that you had a negative experience with Prospector plumbing and heating. Please respond to this email with a description of your concerns and our management team will get back to you shortly. Once more, sincerely apologize for the inconvenience. Please let me know if I can answer any other questions and I'd be happy to help best and then their name. Okay. So what we found is that by getting them off the phone, it gives them a little bit of time to think about it, number one. And then by sending them this email, they a lot of people just drop it right there. And they're like, oh my gosh, I'm gonna have to go complain about this through email, all this stuff, right? So a lot of people just don't respond to this email. So that solves the complaint. The ones who are really mad will, they'll respond to this. But what's nice about them responding in email is then we have their complaint written, it's in email. My general manager can then read the email. He can go look at the job. He can go look at the job notes. He can talk to the technician about the job, and then he can call the customer once he's a little more educated about the problem, right? So it just helps him get a little backstory, back information before he calls the customer, right? So it looks like he knows what he's talking about. And then a lot of the times my general manager will be able to call the customer. So as soon as he gets this information and he sees, what is going on and talks to the technician, he'll call the customer. And most of the time he'll offer them a 10% discount or a 20% discount, and apologize and figure out some way to, know, make the customer happier or just to stop bothering us basically. Okay? Some customers are just nasty. It's just the way it is. It's like one to 2% of the customers are just nasty people and that's just how it is. So this is how we do it. I would recommend doing something very similar. It just works so well that, I can't imagine doing anything else.

24 HR Service

What is up guys? Okay. So I want to talk to you about twenty four hour service. Okay. And specifically why you don't need to do it. And it sounds counterintuitive, but you really don't need to do it. Okay? So on the screen right now, I have on here three of some of the biggest plumbing, heating, HVAC companies in the nation. All of these guys do a hundred million or more and none of them do twenty four hour service. Okay. So if they can do it at a doing a hundred million a year in sales and not do twenty four hour service, then so can you. And the reason that none of these guys do it is because they understand that investing in their

team and giving their team time off is more important and it's gonna be more valuable in the long run to their customer. Okay? So when you require your guys to work, you know, on call and on weekends, It might be a win for your customer, but it's a huge lose for your technician. Right? And if you flip that around, if you can allow your technician to get off at 05:00 and not have to go to another call and have the weekends off, That's a huge win for your technician, which then is going to make him better at work at his job. And then he is going to do a better job serving your customer. So it becomes a win for him and a win for the customer and then in turn it's a win for you because now you have a bunch of happy customers, and it just is worth it in the end. Right? So I've done this for the last three years. No on call. No twenty four hour service. And we do it at 40 below when stuff's breaking and people's, you know, are at risk of their house freezing. It has not been an issue at all. We've had a few upset customers with us, but I have much happier people. And we have much happier, you know, we have way higher retention rates in our company than the typical company. And honestly, I think for a lot of the people in the lower 48, if you can tell potential employees, look, we don't have on call here. We don't do twenty four hour service. That's a huge bonus for them calling you. So in my opinion, I wouldn't do twenty four hour service. And if I was you guys, I wouldn't do it either.