

CSR Master Playbook

Revenue Conversion

+

Customer Service Skills

+

Call Diagnostics



Author: Kerry Webb, PhD



CSR Master Playbook

Customer Service Skills + Basic Diagnostics

Table of Contents

Part 1: Customer Service Foundations

- 1. Professionalism & First Impressions**
- 2. Phone Etiquette & Call Control**
- 3. Active Listening & Empathy**
- 4. Building Rapport & Customer Trust**
- 5. Handling Objections & Difficult Customers**
- 6. Scheduling & Dispatch Coordination**
- 7. Call Documentation & Accuracy**
- 8. Maintenance Plan & Membership Enrollment**
- 9. Upselling Accessories & Add-ons**
- 10. Conflict Resolution & Call Recovery**
- 11. Cross-department Communication (Techs, Sales, Management)**
- 12. Time Management & Call Flow Efficiency**

Part 2: Advanced CSR Development

- 13. Advanced Objection Handling & Negotiation**
- 14. Customer Retention Strategies**
- 15. Delivering WOW Experiences**
- 16. Handling Emergency & After-hours Calls**
- 17. Sales Support & Lead Qualification**
- 18. Leveraging CRM & Software Tools**
- 19. Communication Across Cultures & Personalities**
- 20. Advanced Call Coaching & Peer Training**
- 21. Metrics, KPIs, and Call Quality Monitoring**
- 22. Managing Stress & Preventing Burnout**
- 23. Leadership Development for CSRs**
- 24. Capstone: CSR as a Career Path & Mentor**



Program Summary

This two-part development program transforms entry-level technicians into **customer-focused diagnostic masters** who are prepared to lead teams, optimize systems, and build lasting customer loyalty.

- **Part 1 Focus:** Customer service mastery. Techs learn how to greet customers, listen effectively, explain issues in plain terms, handle objections, and build trust that leads to reviews, referrals, and memberships.
- **Part 2 Focus:** Advanced diagnostics and leadership. Techs master electrical, airflow, refrigeration, and specialized equipment diagnostics. They also learn to optimize whole systems and mentor junior techs.

The program culminates in a **Capstone Certification**, demonstrating full integration of technical, customer, and leadership skills.

Roadmap & Milestones

Part 1: Foundations of Customer Service

Focus: Call mastery, professionalism, customer trust, and efficiency.

Section 1 – Foundations & First Impressions

- **Modules 1–3:** Professionalism & First Impressions, Phone Etiquette, Active Listening & Empathy
- **Milestone:** “CSR Essentials Badge” → Demonstrates consistent tone, courtesy, and call flow.

Section 2 – Building Trust & Confidence

- **Modules 4–6:** Rapport & Trust, Handling Objections, Scheduling & Dispatch Coordination
- **Milestone:** “Trust Builder Badge” → Successfully books calls with empathy and accuracy.

Section 3 – Accuracy & Sales Foundations

- **Modules 7–9:** Call Documentation, Membership Enrollment, Upselling Accessories & Add-ons
- **Milestone:** “Revenue Enabler Badge” → Begins generating memberships and accessory opportunities.

Section 4 – Service Recovery & Team Collaboration

- **Modules 10–12:** Conflict Resolution & Call Recovery, Cross-Department Communication, Time Management
- **Milestone:** “Team Connector Badge” → Manages conflict effectively, coordinates across teams.



Part 2: Advanced CSR Development

Focus: Leadership, advanced sales support, technology mastery, and mentorship.

Section 5 – Advanced Sales & Negotiation

- **Modules 13–15:** Advanced Objection Handling, Retention Strategies, Delivering WOW Experiences
- **Milestone:** “Customer Loyalty Badge” → Increases retention and creates WOW customer moments.

Section 6 – Emergencies & Sales Enablement

- **Modules 16–18:** Handling Emergency Calls, Sales Support & Lead Qualification, CRM Mastery
- **Milestone:** “Sales Connector Badge” → Identifies and qualifies leads, handles emergencies confidently.

Section 7 – Adaptability & Peer Leadership

- **Modules 19–20:** Communication Across Cultures, Advanced Call Coaching & Peer Training
- **Milestone:** “Peer Mentor Badge” → Demonstrates leadership by coaching peers and adapting communication styles.

Section 8 – Performance, Resilience & Leadership

- **Modules 21–24:** Metrics & KPIs, Stress Management, Leadership Development, Capstone: CSR Career Path
- **Milestone:** “Pathfinder Badge” → Completes program, mentors peers, and creates personal career plan.

Support Systems

- **Weekly scorecards:** Track call counts, close rates, reviews, average ticket, callback rate.
- **Ride-along coaching:** At least 1 per quarter per tech.
- **Ongoing role-plays:** Monthly customer service scenarios.

Program Outcomes

Graduates of this Mastery Plan will be able to:

- Deliver outstanding customer experiences that drive reviews and referrals.
- Confidently diagnose electrical, airflow, refrigeration, and advanced system issues.
- Optimize full-system performance for comfort and efficiency.
- Mentor and train junior techs with professionalism and patience.
- Represent the company as trusted experts and future leaders.

