BGS CONTRACTOR GROWTH

CSR CALL SCRIPTS & CRM MASTERY

CALL FLOW • CUSTOMER CARE • CRM



Build Trust. Present Value. Book the Call.

Table of Contents

Inbound Call Script 3

Greeting and Opening Questions 3

Demonstrating Empathy 3

Reassurance and Check In 3

Gathering Customer Information 4

Building Value 4

Diagnostic Pricing and Scheduling 5

Membership Offer 5

Payment Information 6

Confirmation and Appreciation 6

CSR Call Booking Process 7

Call Volume and Capacity 8

Call Opportunities and Booking Benchmarks 9

Outbound Tune Up Scheduling Script 11

Step by Step Script 11

Objection Handling 12

Final Script and Structure 13

Expected Results and Training Notes 14

CSR KPIs and Performance Benchmarks 14

Five Essential CSR Skills 15

KPI Benchmarks for Great CSRs 15

25 CRM Tasks for CSRs 16

Call Intake and Customer Identification 16

Dispatch Coordination 18

Revenue and Marketing Accuracy 19

Booking Conversion Skills in Service Titan 20

Customer Experience 21

The NEW CSR Inbound Call Script

GREETING

BE ENTHUSIASTIC

*Thank you for calling (**Company Name**). This is (**CSR name**)..*
How can I make your day better today?

Ask great opening questions –

- **How can I help you today?**
- **What are you calling about today?**

1. Questions are meant to gather information and differentiate you from the competition by building rapport and earning trust.
2. Develop 4-6 great opening questions that you can ask here:
   Give at least a couple of examples -
   - _____
   - _____
   - _____

DEMONSTRATE EMPATHY

Empathy statements should be genuine

- Stay away from "I'm sorry…" statements
- Develop some examples of empathy statements here:

Examples:

- *That is really frustrating when that happens! Can you tell me if you've ever had this happen before? And when did this problem first start for you?*
- *I'm really glad you called. I know it's frustrating when your heating or cooling isn't working the way it should, especially when you're trying to stay comfortable at home. Let me get a little information so we can get someone out there to help you.*
- *HVAC problems are never convenient. The good news is we help customers with this every day, and I'll do everything I can to get a technician out there as quickly as possible.*
  - _____
  - _____
  - _____

REASSURE & CHECK-IN - Let the customer know that they have called the right company, and that they don't need to worry any more.

Example:

*Well, you've definitely called the right place. We take care of this type of concern all the time! Would it be ok if I collect some critical information to get started? Are you a VIP GreenShield Member? **OR** Do you plan on paying FULL RETAIL PRICE today?*