PLAYBOOKS

CUSTOMER SERVICE YOUR CUSTOMERS WILL MENTION

Small habits that make a visit feel easy, and a recovery plan for when one goes wrong.

ON THE PHONE

- Answer with your company and your name, at a pace people can understand.
- Let them finish. Most callers need to tell the whole story once.
- Use their name, and mention your history with them if you have one.
- Say what happens next before you hang up. Unknowns are what make people anxious.
- Never put someone on hold without asking and giving a time.

BEFORE THE VISIT

- Confirm the day before.
- Text when the tech is on the way, with name and photo if you can.
- Call the moment you know you'll be late. Don't wait to be called.

IN THE HOME

- Knock, step back, introduce yourself, and show your ID.
- Shoe covers and a drop cloth, every time, without being asked.
- Ask what they've noticed before you look at anything.
- Explain findings in plain language and show a photo.
- Give the price before starting.

- Leave it cleaner than you found it. Walk the customer through what you did.

SAY THIS, NOT THAT

NOT THAT	SAY THIS
That's not my department.	Let me get that handled for you.
Calm down.	I'm sorry. Tell me what happened.
We're really busy.	The earliest time I can promise is ___.
That's our policy.	Here's what I can do.
Sometime between 8 and 5.	Between 10 and 12, and you'll get a text when the tech is on the way.
You need a new unit.	Here's what I found, and here are your options.

WHEN SOMETHING GOES WRONG

1. **Listen** all the way through without defending.
2. **Apologize** for the experience, plainly.
3. **Say exactly** what you'll do and by when.
4. **Do it**, and call when you said you would.
5. **Log it**, and look for patterns monthly.

Decide ahead of time what each person can approve without asking, so a customer doesn't have to wait for a manager to get a small problem fixed.

EVERY WEEK

- Listen to two recorded calls per person, and score them together.
- Read every review and complaint out loud at the team meeting.
- Pick one habit and practice it for the week.

MAKE THE FIRST CALL EASY

Your phone greeting sets expectations before anyone arrives. Keep it short. Avoid long menus. If a customer has to press four buttons to describe a leak, you've already made their bad day worse.

When a customer has to wait, tell them how long and why. "I'm going to look at tomorrow's schedule. It'll take about 30 seconds." Most people don't mind waiting. They mind not knowing.

HIRE FOR KINDNESS, THEN TRAIN

You can teach someone your software, your service area and your scripts. It's much harder to teach warmth and patience. When interviewing office staff, have them talk with you by phone first. That's where they'll be doing the job.

Train your techs on customer service as seriously as you train them on equipment. A brilliant diagnosis delivered with a sigh and a shrug won't earn a referral.

HANDLE THE MOST COMMON COMPLAINTS

Most complaints come from a handful of situations. Prepare answers ahead of time.

- **"Your tech was late."** Apologize and give the new time. Find out what broke down in your schedule.
- **"It's broken again."** Take ownership. Get someone back quickly, and at no charge if it's your work.
- **"That's more than I was told."** Pull up the record. Explain what's different, and fix it if you got it wrong.
- **"Nobody called me back."** Apologize without excuses, solve it, and then find out why.

SERVE EVERY HOUSEHOLD WELL

Some of your customers are elderly, hard of hearing or more comfortable in another language. Speak clearly, take your time and offer to explain things to a family member if

they ask. Never pressure someone who seems confused. Train your techs to walk away from a sale that doesn't feel right.

FOLLOW UP AFTER THE JOB

A short call or message a few days after a significant job tells a customer you care about the result. Ask a simple question: "How's everything working?" When something's wrong, you get to fix it privately. When it's going well, you've reinforced a good memory.

MEASURE SERVICE

Survey every customer the same way, with one or two questions. Track first-call resolution, on-time arrivals, callbacks and complaints per hundred jobs. Share the results with the whole team every month, and celebrate names, not just numbers.

Sources: Service ProCall program guidance.

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BEST PRACTICES: REVIEWS AND THE CUSTOMER EXPERIENCE

MAKE IT A HABIT

What good looks like

> A review request after every completed job.

> Every review answered, good or bad, within a few days.

> Your rating and review count tracked monthly.

The habits

1. Ask for the review the same day, while the visit is fresh.
2. Send the link by text, so it takes one tap.

3. Never offer anything in exchange for a review, and ask every customer, not just happy ones.
4. Reply to every review, and take problems offline fast.
5. Listen to calls and read reviews for patterns, then fix the cause.
6. Make the first call and the arrival feel professional: names, windows and updates.

Signs it's time to get help

- Review requests depend on techs remembering to ask.
- Negative reviews go unanswered.
- Customers complain about communication more than the work.

Where we fit: ProCall Field sends a review request after every completed job, and every Service ProCall call is recorded and reviewed for quality.

More on reviews and the customer experience