PLAYBOOKS

SCRIPTS THAT BOOK THE VISIT

Word-for-word starting points for your office. Change them until they sound like your people.

Inbound booking call

```
Thanks for calling [Company], this is [Name]. How can I help you today?
[Listen. Don't interrupt.]
I'm sorry you're dealing with that. Let me get someone out to you.
Can I get your name and the address where the problem is? ... Have we
been out to you before?
How long has this been going on? Is anything leaking, sparking, or not
safe right now?
Here's what happens next: a licensed tech will come out, find the cause,
and go over your options before any work starts.
I have [day] between [window], or [day] between [window]. Which is
better?
Let me read that back: [date], [window], [address], and the best number
is [number]. Any gate codes, pets or anything the tech should know?
You'll get a confirmation now and a text when the tech is on the way. Is
there anything else I can do for you?
```

"How much will it cost?"

That's a fair question, and I want to give you a straight answer.
Our service visit is [fee], and that covers the tech coming out and finding the cause. [If you have a waiver: It comes off if you go ahead with the repair.]
I can't give you an honest repair price without someone seeing it, because the same symptom can be a small fix or a big one. The tech will give you the price before any work begins, so there are no surprises.
I have [day] or [day]. Which would you like?

"Can you just tell me what's wrong?"

I wish I could. I'd only be guessing, and a wrong guess could cost you money.
What I can do is get a licensed tech to you who'll find out for sure and walk you through it.
Is anything unsafe right now? ... [If yes, give your company's safety instructions.]
I have [window] today or [window] tomorrow. Which is better?

After-hours emergency

Thanks for calling [Company]. This is [Name], and I can help you tonight.
Is everyone safe? Is there water, smoke, a gas smell, or sparking?
[Follow your emergency instructions. For gas or fire, tell them to leave and call 911 or the gas utility.]
Our after-hours visit is [fee]. The on-call tech can be there around [time]. Do you want me to send them, or would first thing in the morning work?
[Send.] I'll have the tech call you when they're on the way. If it gets worse before then, call me back at this number.

Day-before confirmation

Hi [Name], it's [Your name] at [Company]. I'm confirming your visit tomorrow between [window] at [address].
Will someone 18 or older be home? ... Great. The tech will text when they're on the way.
If anything changes, call or text this number and we'll find a new time.

Running late

Hi [Name], it's [Your name] at [Company]. Your tech is running behind because [honest short reason], and I didn't want you waiting and wondering.
The new arrival time is about [time]. Does that still work, or would you rather I find you a different time?
I'm sorry about the wait, and thanks for your patience.

Upset customer

I'm sorry. That's not the experience we want you to have.
Would you tell me what happened, from the start? I want to make sure I have it right.
[Listen all the way through. Take notes. Don't defend.]
So what I'm hearing is [repeat it back]. Is that right?
Here's what I'm going to do: [specific action], by [specific time]. I'll call you at [time] either way, even if I don't have everything yet.
Is there anything else that would help make this right?

Past customer call

Hi, is this [Name]? It's [Your name] with [Company]. We took care of your [system/job] at [address] back in [month, year].
Is this an okay time for a quick question? ...
How has it been working? ...
We're [reason for the call: checking systems in your area / doing no-charge safety checks] next week, and I wanted to offer you a spot before the schedule fills.
I have [day] morning or [day] afternoon. Which is better?
[If not interested:] No problem at all. Would you like us to check back next season, or take you off our call list?

Open estimate follow-up

Hi [Name], it's [Your name] with [Company]. [Advisor] gave you an estimate on [date] for [work], and I wanted to see if any questions came up.
Is there anything about the options that wasn't clear? ...
Has anything changed since [Advisor] was there? ...
Would it help to look at a different option, or go over it again together?

Voicemail and text

VOICEMAIL
Hi [Name], it's [Your name] with [Company], calling about [reason]. Reach me at [number]. I'll also send you a text so you have it. Thanks.

TEXT
Hi [Name], it's [Your name] with [Company]. I just tried you about [reason]. Is [day] or [day] better for you? Reply STOP to opt out.

HOW TO USE A SCRIPT

- Practice out loud, in pairs, until no one sounds like they are reading.
- Keep the order and the promises. Let people use their own words for the rest.
- The office books the visit and leaves the diagnosis to the tech.
- Always offer two times. It is easier to pick one than to think of one.
- Fill in your own fees and safety instructions before anyone uses these.

Outbound calls and texts must follow the calling rules, including consent, do-not-call lists and opt-outs. Read the calling rules guide and check with your attorney. These plays are general guidance.

BEST PRACTICES: CLOSE RATE AND AVERAGE TICKET IN THE HOME

MAKE IT A HABIT

What good looks like

> Every visit ends with written options: good, better and best.

> Financing offered on every larger option.

> Close rate and average ticket tracked by tech, every month.

The habits

1. Use the same inspection checklist on every visit, so nothing is missed.
2. Show photos of what the tech found before talking price.
3. Present options in writing, with a monthly payment on each.
4. Ask for the decision, and accept "not today" without pressure.
5. Ride along and role-play monthly. Coach one habit at a time.
6. Hand unsold options to a follow-up process, not the tech's memory.

Signs it's time to get help

- Close rates vary widely between your techs.
- Options are given verbally, if at all.
- Financing is offered only when the customer asks.

Where we fit: ProCall Field gives techs the inspection checklist and the good-better-best options sheet, with monthly payments and a signature.

More on close rate and average ticket in the home