

8 Hour CSR Training

Introduction-

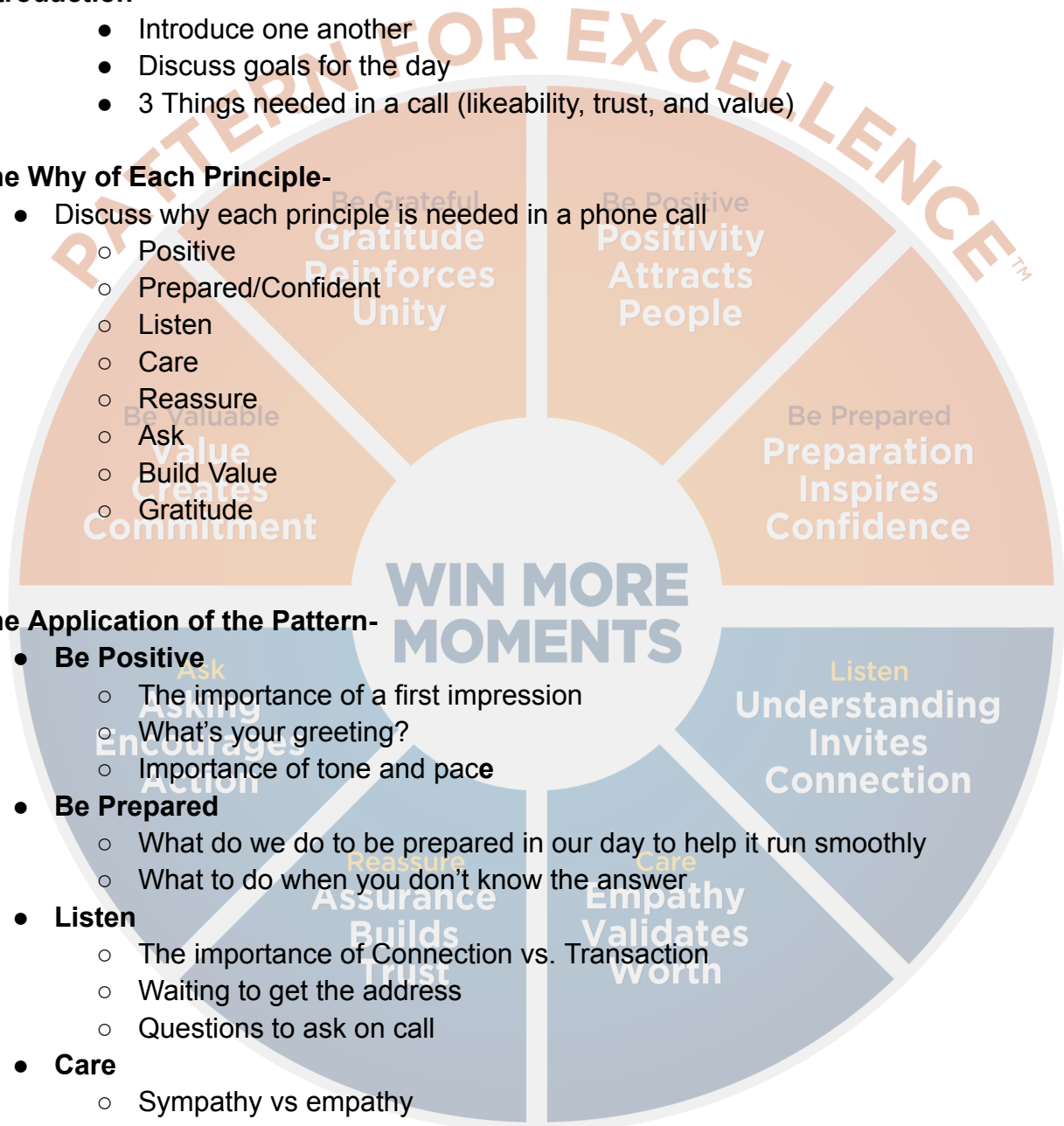
- Introduce one another
- Discuss goals for the day
- 3 Things needed in a call (likeability, trust, and value)

The Why of Each Principle-

- Discuss why each principle is needed in a phone call
 - Positive
 - Prepared/Confident
 - Listen
 - Care
 - Reassure
 - Ask
 - Build Value
 - Gratitude

The Application of the Pattern-

- **Be Positive**
 - The importance of a first impression
 - What's your greeting?
 - Importance of tone and pace
- **Be Prepared**
 - What do we do to be prepared in our day to help it run smoothly
 - What to do when you don't know the answer
- **Listen**
 - The importance of Connection vs. Transaction
 - Waiting to get the address
 - Questions to ask on call
- **Care**
 - Sympathy vs empathy
 - 3 ways to show empathy
- **Reassure**
 - The importance of "I can help you with that"



Ask

- **Asking for the appointment**
 - Importance of an open ended question
 - Gathering a customer's information
 - Name, address, phone number, landlord, lead source

Practice-

- Customer, CSR, and Observer. Observer gives feedback
- Come back and discuss as a group

Break-

Urgency List

- How to book calls even when you are booked solid.
- Practice Urgency List 2x each and discuss as group

Backup Plan

- What to do when the customer says, "Let me call around..."
- Practice

Build Value

- Building value before price
- Build value in technician, service, and company
- Write your own build value statement

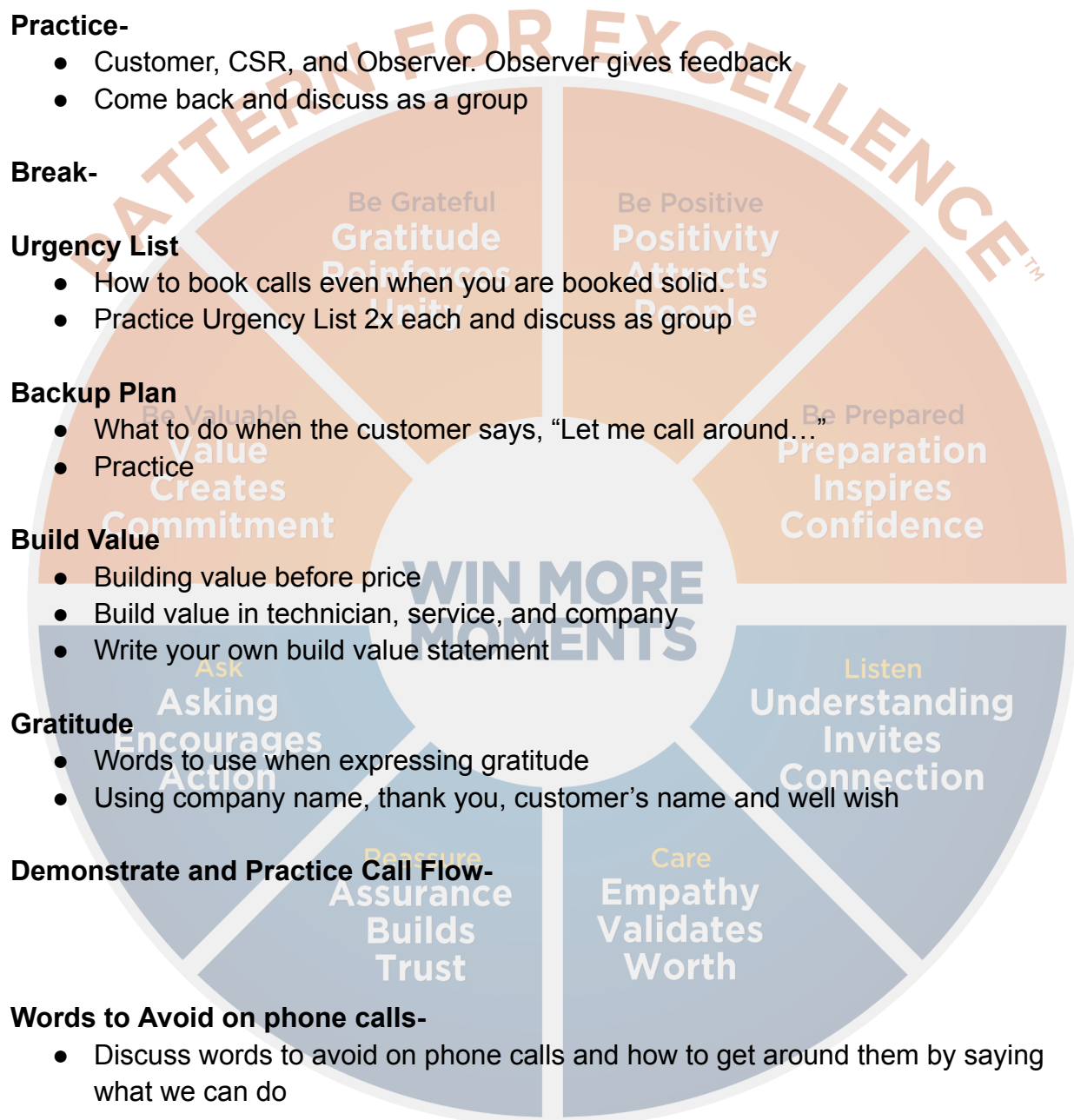
Gratitude

- Words to use when expressing gratitude
- Using company name, thank you, customer's name and well wish

Demonstrate and Practice Call Flow-

Words to Avoid on phone calls-

- Discuss words to avoid on phone calls and how to get around them by saying what we can do



Upset Customers-

- Listen to upset customer calls and make a list of dos and don'ts. Discuss how to de-escalate upset customers.
- Importance of the follow-up
- What to do when customer is still upset

Break:

Price Shoppers-

- Plan A- ask questions
 - practice
- Plan B- build value early
 - practice
- Plan C- IRAP (Isolate, Resolve, Ask and Pause)
 - Create a negotiation toolbox and demonstrate
- Plan D- Follow-Up

Service Agreements

- The importance of educating customers
- What's in your Service Agreement?
- How to bring up Service Agreements on the phone
- Buzzwords with Service Agreements
- Practice

Offering Additional Services

Q&A-

Set goals and share-

