Step by Step to Service Dispatching Procedures

Nothing gets sold until a lead is set. The objective of the lead coordination function is to convert a phone prospect into a sales lead. Yet many companies do not train their people to do this. Scripting helps train employees to set leads.

Studies show that many companies are successful when talking to customers and prospects on the phone. This costs the company in terms of booked sales appointments. Considering the expense of generating sales leads, it's imperative to train employees how to set sales appointments over the phone.

Some companies’ funnel all sales inquiries through a single person who sets the sales appointment. Other companies use CSRs to do this without transferring the call to another person. This is a valid approach. In any case the person setting the lead is trained to handle “inbound” phone sales inquiries. Here is the process:

1. Greeting

2. Ask for name and identify as existing customer or prospect:
   - If existing customer, confirm address, nature of call, existing equipment and reason for call (source).
   - If this is not an existing customer:
     a. Verify the center serves the prospect’s market. Also need to confirm if the center does the type of work the prospect is asking for such as selling a boiler, a window air conditioner, etc.
     b. Verify home ownership.
     c. Collect name and prospect information (address, phone number, etc.).
     d. Identify what prompted the call (how they heard of the company).
     e. Identify nature of call. Also collect prospect home information such as type of equipment and age of equipment.
     f. Identify cut-in applications particularly if the company does not do this type of work. When dispatching a sales lead for a cut-in, the Comfort Advisor needs to be qualified for the application. Note the term ‘cut-in’ refers to applications where ductwork is required such as cases where a central air conditioning is being added to a home that is heated by radiant.

   - Handle request for price over the phone.
   - Identify if this is a hidden request for service.
   - Along the way, handle other questions the customer/prospect may ask.
3. Set appointment:
   - Attempt to schedule sales appointment so all decision makers are present.
   - Handle any objections to (spouse/partner) being at sales appointment.
   - Let prospect know of time needed for appointment.

4. Conclude call:
   - Let the prospect know your company will be calling the evening before the appointment date to confirm.

It’s important that the people answering the phone are trained on basic phone skills. In addition, the people who set sales appointments must be trained to perform the above process. The following scripts help do that. Remember it’s not the wording in the script that’s important. It’s the process that’s most important. Your people should internalize the process and come up with their own words. Adapt the scripts as needed for your company. Here are the scripts that are included in this article:

   - Greeting
   - Collecting Prospect Home Information
   - Request for Price
   - Setting Appointment
   - Hidden Service Request
   - Final Objection for Request for Price
   - Spouse/Partner Objection to Being at Sales Appointment

Work with your people on the script until it becomes comfortable and second nature. If possible, monitor phone calls occasionally to make sure your employees are sticking with the process. One way of doing this is to call into the office pretending to be a prospect. See how your people do.
This script assumes the call has been forwarded to the Lead Coordinator

Thank you for holding, this is (your name), how may I help you?

Listen carefully to both the content and the demeanor of the customer’s response. Always address their request directly - don’t give bland responses. Adapt to their tone and use it as a guide to your own demeanor. If the customer indicates they want an estimate on a new heating and/or cooling, jot down information on Prospect Alert form. Proceed as follows........

Great, I can help you with that. Let me get some info real quick.

Check to see if the prospect is on the customer database.

If an existing customer

Ok Mr./Mrs./Ms (customer's name) we show your at (customer’s address). Is that correct?

If correct

Confirm type of system and age of equipment.

If incorrect

Oh. I’ll get our records changed. What is your address?

And your home phone? Any work phone? Do you have an e-mail address?

If not an existing customer

OK Mr./Mrs./Ms. (prospects name). May I have your address?

If prospect does not give name and only wants a price over the phone.

How did you hear about us?

Identify how they heard of us or what prompted the phone. Adapt this script as necessary for an existing customer prospect. Be specific here. It is vitally important to find exactly what letter, ad, sign, person, etc. was responsible for call. If a prospect, says the Yellow Pages, ask if there anything else that prompted them to call.
Lead Coordinators

This script asks prospect information about the home.

Thank you, now about how old is the home?

If the home is fairly new (less than 10 years) the homeowner may be having comfort problems with existing system.

If older than 10 years

OK, and you have central heat right now?

If no

Confirm if it’s a boiler, floor furnace, wall furnace, radiant system, etc. Depending on the type of work the center does, proceed as follows.

If no

I'm sorry Mr./Mrs./Ms. (name), but we do not specialize in that type of replacement. I would be glad to recommend another company if you want.

Have a list of companies ready to make a referral.

Thank you for calling (name of center). Have a great day.

If yes

Is your Air Conditioning central as well?

If no

This is a cut-in application. Depending on if the center does this type of work.

If yes

This is a cut-in application. Depending on if the center does this type of work.

I'm sorry Mr./Mrs./Ms. (name), but we do not specialize in that type of replacement. I would be glad to recommend another company if you want.

Have a list of companies ready to make a referral.

Thank you for calling (name of center). Have a great day.

Is that system original to the house?

If no

If yes

Is the system original to the house?

If not, ask how old it is.

If the system is fairly new (less than 10 years), the homeowner may be having comfort problems with existing system. Find out why they are interested in replacing system.

On a system less than 10 years, where the prospect is really looking for a service call.

Note this is a cut-in application and send out qualified Comfort Advisor.

I'm sorry Mr./Mrs./Ms. (name), but we do not specialize in that type of replacement. I would be glad to recommend another company if you want.

Have a list of companies ready to make a referral.
When prospect is shopping for a price over the phone.

I'm not the person who does the pricing and I would be way off. We do have Comfort Advisors that will do an analysis in your home to engineer a system for your needs. Can I schedule an appointment for you?

If prospect insists on a price and asks why a Comfort Advisor needs to the house or that a competitor gave a quote over the phone, adapt the following response.

I know some companies will do that kind of thing, but we hesitate because there are too many questions that need to be answered before we can do the job correctly.

If prospect asks what kinds of questions or something to that effect, adapt the following response.

We know that many heating and cooling systems are not sized correctly. A unit that's not sized correctly can effect operating costs, comfort and even your health. So, to just install the system without doing a load calculation would be irresponsible. Do you know what the heat loss or heat gain is from the load calculations?

Adapt the following to the customer’s response.

There are other questions, like, what is the cfm capacity of the ductwork, age and type of electrical panel, the distance between the outside unit and inside unit? Actually, it takes about an hour and a half of questions and measuring to know how much the system will cost. So Mr./Mrs./Ms. (prospect's name), I think you can see why you want to beware of contractors that just give prices over the phone. Can I schedule an appointment for you?

If prospect is concerned about a long hard sell.

I can understand that, I don't like that kind of thing either. I think you will be surprised with our Comfort Advisors. They are low key and not high pressure people. Our customers love them and I think you'll enjoy the time together. When should I schedule an appointment?
The purpose of this script is to confirm that the prospect owns the home and to try to get both decision makers at the sales appointment.

Now, are you the sole owner of the home or is there a spouse?

If the caller does not own the property, let him/her know the center must make arrangements with the owner. Get owners name and phone number.

Call owner and confirm work to be done. Get name, phone number and all information required of the Prospect Alert Form.

If sole owner

Thank you. Now we can come out whenever it’s convenient for both of you. Do you folks work day and are home in the evenings?

No problem Mr./Mrs./Ms. (name). We are available weekends for people who are busy during the week. How does Saturday morning look? Or would afternoon be better?

Set a time for next available appointment that works into their schedule. Adapt the following script as needed.

The purpose of this line of questioning is to get both decision makers at the sales appointment. If faced with an objection, go to script “F”. Otherwise note if they work during the day or not.

If they both work the same shift, set a time for the next available non-work shift, i.e. today, tonight, tomorrow.

After finding a good time for both of them finish with....

Great! I have that down for (day of week) the (date) at (the time). Please mark that on your calendar. Let your husband/wife/partner know and we’ll see you then. We allow about 60 to 90 minutes to measure your home.

We will call you the evening before to remind you and let you know who is coming out to your home. Have a great day and thanks for calling.

Call owner and confirm work to be done. Get name, phone number and all information required of the Prospect Alert Form.

If sole owner

Thank you. Now we can come out whenever it’s convenient for you. Are you at work during the day and home in the evening?

Thank you. Now we can come out whenever it’s convenient for both of you. Do you folks work day and are home in the evenings?

The purpose of this script is to confirm that the prospect owns the home and to try to get both decision makers at the sales appointment.
If preceding script uncovers a hidden customer request for someone to look at the equipment for servicing, try to book a service call.

We could get a service professional out to diagnose the problem so you know what your options are.

That will cost (diagnostic fee). However, if you would rather buy a (new furnace/air conditioner) than spend the money on the quoted repair, we will credit the (diagnostic fee) towards a new (furnace/air conditioner).

Should I schedule a service professional to come out to your home?

Schedule service call.
Lead Coordinator – Final Objection for Request of Price Over the Phone

The use of this script is strictly up to center management. Some centers have policies never to give prices over the phone.

The purpose of this script is to handle the “final request” for a price over the phone. If using this script, the center must prepare a quick price sheet for the Installation Coordinator.

I can give you that information for you, but first can I ask how you heard of us?

If customer answers, note on Prospect Alert Form. Otherwise proceed....

The price varies quite a bit depending on the quality of the equipment and the work that’s needed.

However, as strictly a ballpark figure, a (type of equipment and size generally starts at (price for basic or standard) and goes up from there.

If you can keep the caller on the line...

I do caution you to get an apples-to-apples comparison. A low price over the phone does mean a thing if the unit doesn’t work to your satisfaction once it’s installed. Wouldn’t you agree?

Allow prospect to reply and proceed accordingly.

There’s no charge and no obligation to have one of our Comfort Advisors come out. Couldn’t I get your name and address and set an appointment for you?

If yes

If no

Thank you for calling (name of center). Good luck and if we can help just give us a call.

Get name, address & phone number from Caller I.D. if possible and enter on Prospect Alert Form for future marketing.
The purpose of this script is to handle the objection of the spouse or partner having to be at the appointment. If the caller asks why the spouse/partner needs to be there, adapt this script as needed.

When we come to your home, we do a thorough and professional job. It will take 60 to 90 minutes.

We will be gathering a lot of information from you. You will be gathering a lot of information from us.

Normally it saves a lot of time for both of us.

- **Still Objects**
  - Go to Step 5 to continue scheduling sales lead. Note that this is a one-legger under.

- **Agrees**
  - Go to Step 5 to continue scheduling sales lead.

**Lead Coordination – Spouse/Partner Objection**
Why is this critical to your success?

- If you do not confirm that the prospect owns the property, you could send your sales people on a call with no chance of closing. If the prospect rents the property, you can let the prospect know you need to make arrangements, with the owner. This puts you sales people in front of the person with the authority to make the decision.

- By collecting information on the home, you are able to schedule a sales person who has the necessary technical skills for the application. You are also able to confirm if your company does the work requested (i.e. – window air conditioning)

- If you can identify a hidden request for service, you avoid the situation where your sales people go on a call that’s really intended for a service technician.

- By handling requests for prices over the phone correctly, you can divert the pricing issue and schedule a sales appointment. When the pricing request is not handled correctly, the phone call ends up without a sales appointment.

- By attempting to schedule sales appointment so all decision makers are present, your sales people are in the best position to close the sale at the initial appointment. However, if not handled correctly, it’s very easy to insult the prospect and lose the sales appointment all together. When setting an appointment where all decision makers are not present, it’s important to identify this situation with the sales person so he/she knows how to handle the sales call. This is commonly called a “one-legger”.

- The people who set sales appointments should put sales people in the best position to close. This absolutely MAKES YOU MORE MONEY!