

# Employee Holdings CSR Service Formula

1.	Answer in three rings or less.
2.	Use approved greeting.
3.	Assure the customer they have called the right person. <i>Great, I can help you with that.</i>
4.	Identify customer information. Get caller's name and company name.
5.	Use caller's name.
6.	Determine if caller has done business with your company before. <i>Have you done business with us before?</i>
7.	Qualify the need. What part, when needed (urgency), why replacing?
8.	Offer related items. <i>Ask specific questions concerning other needed supplies/repairs/services. Based on your experience, offer specific parts the customer may also need for this repair?</i>
9.	Present two to four features before price. <i>While I am checking availability and price, let me tell you about...</i>
10.	Provide price.
11.	Communicate next steps Ask to order; Request a follow up call; Communicate a summary of what will happen next and verify with the customer they understand and/or agree. <i>"How does that sound?"</i>
12.	Confirm contact information.
13.	Ask a resistance question. <i>What did I miss that could help you make your decision? What can I do to earn your business?</i>
14.	Manage concerns. Address customer's resistance (i.e. offer to follow up, create urgency, or create additional value).
*	If confirmed, thoroughly review details, specifically: When, Where, How much.
15.	Thank the customer.
16.	Tone

## Approved Greeting

*Thank you for calling (company name).  
This is (your name).  
How may I help you?*

## Busy? Use an Effective Call Back

*I am currently helping another customer  
and your call is very important to me.  
Rather than rush your call or keep you  
on hold, may I please get your name  
and number and call you back within  
\_\_\_\_\_ minutes?*

## Features

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*Signature*<sup>®</sup>  
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