

Scoring Guidelines

Signature Worldwide
Employee Holdings CSR Parts



Answer in 3 Rings

Intent of this skill:

To answer the phone in a timely manner. Credit is given if the phone is answered within 3 rings.

Initial greeting

Intent of this skill:

To answer the phone in a professional and consistent manner.

Approved Greeting:

We are scoring the department greeting. To receive credit, the employee must include the following four specific components in their greeting.

- An Opening Pleasantry (Thank you, Good Morning/Afternoon)
- Company Name (or Department if the call was transferred to them (Parts/Service))
- Employee Name
- An Offer of Assistance

Example greeting:

- "Thank you for calling Hydraquip, this is (employee name), how may I help you."
- "Good morning, Parts, this is (employee name), how may I help you."
- "Thank you for calling GCC parts department, this is (employee name) how can I help you?"

Assure the caller

Intent of this skill:

To assure the caller they have reached the correct person to help them with their need. Using a statement of assurance also allows you to take control of the conversation and provide a natural transition to additional questions you will have for the caller. It is a quick customer service skill that can have a significant impact on the customer's overall experience.

When to apply this skill:

This skill is most effective when applied right after the customer shares why they are calling, assuring means to give confidence. This skill must be conducted right after the caller's initial request. Typically, this is within 15-30 seconds of the start of the call. Keep in mind, the intent of this skill (to give confidence) is lost if you ask several questions and then come back to let the caller know you can help them.

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What does this skill sound like?

The following is a sample list of common statements of assurance.

- “Great, I can help you with that.”
- “I would be glad to help you...”
- “I would be happy to help you...”
- “Sure, I can look that up for you...”
- “Yes, we carry that, and I can try to help you.”
- “Let me see if I can help you with that.”
- “I am glad you called, we can help you with this.”

Note – One-word responses, such as “okay” and “yes” are NOT considered statements of assurance.

Identify customer information

Intent of this skill:

To gather information about the customer. This helps personalize the conversation and allows the employee to follow-up with the customer, if needed.

When to apply this skill:

To award the point, we must hear the employee identify **both items to be awarded credit for the skill**. Although it is ideal to gain this information at the beginning of the call, this information can be gathered anytime during the conversation. If not provided by customer, the employee must ASK for, verify and/or acknowledge they know the information.

- Customer Name
- Company Name

What does this skill sound like?

The following are examples of asking for the customer information.

- “May I ask who I am speaking with...What’s company are you with?”
- “I see your company name (XX) showing on caller ID, is that correct? Who am I speaking with?”
- “I have found you in our files and have you listed here, and to verify, this is the one on XX address?”

Ask and use caller’s name

Intent of this skill:

To personalize the call by using the customer’s name.

When to apply this skill:

This skill is awarded when we hear the employee ask for the customer name and then use it ***at least once*** at any point during the call. This does include repeating back the name when the customer provides it or saying it at the end.

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Qualify the need

Intent of this Skill:

To better understand the caller's need to provide the best solution. Questions can be worked into the conversation anytime during the call.

When to apply this skill:

To achieve this skill, the employee must ask/determine ***at least two*** items regarding the specific needs of the customer. It is highly recommended one of the questions determines the urgency the customer is truly facing. The following is a sample list but, does not include all possible options.

- Type of service or parts needed
- Identify customers urgency
- Shop or field (for service)
- If customer wants new/used/remanufactured for parts
- If appropriate – why is service/part needed
- Identify (or verify) serial/model numbers
- Obtain meter reading if appropriate

What does this skill sound like?

The following is a sample list of ways to ask these questions.

- “What is the model and serial number of your machine?”
- “Do you need us to come to you or would you like to bring it in to the shop?”
- “Do you have a model number and a part number?”
- “How soon do you need this service?”
- “How soon do you need this part?”
- “Are you experiencing a work stoppage because of this?”

The information can be provided by the customer, however, if the customer did not offer the information the employee must ask or verify the information.

Offer related items

Intent of this Skill:

To use your knowledge and experience to help make sure the customer has what they need to get their job done correctly. This skill takes the pressure off the customer by not leaving everything up to them. You might also save the customer (and yourself) an extra phone call by offering something the customer needs but is not aware of.

When to apply this skill:

This skill can happen anytime during the conversation. It is up to you as to when you want to offer associated products or services based on the conversation you are having with the customer. If you can't think of any specific associated products or needs you can always ask a general question to determine if the customer may have any additional needs.

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What does this skill sound like?

The following is a list of common examples.

- “Is there anything else I can help you with today?”
- “Do you need any other supplies for the machine/unit?”
- “Do you need the (related item) that goes with this ordered, as well?”
- “Is there anything else (company name) can do for you today?”
- “What else can I help you with today?”

Note: It is ok to offer related items as a general question – EVEN at the end of the call with a general offer to do more for the customer. This WILL count as Offer Related Items.

Communicate Next Steps

Intent of this Skill:

To gain a commitment and/or inform the customer of what is going to happen from this point so the customer knows what to expect next.

When to apply this skill:

This typically happens at the end of the call when you are closing the conversation. At this point you can do either of these options:

- Ask to confirm the appointment time or order being placed – get the customers response of Yes/No to move forward with the commitment.
- Advance the sale – ask for permission to call the customer back after a period of time to be able to confirm the work/sale or answer questions with the objective to gain the business.
- Summarize what will happen next and verify the customer understands and/or agrees to next steps.

What does this skill sound like?

The following are examples of Communicate Next Steps by using: Ask to confirm, Advancing the sale, Summarize and Verify:

- “I will send this request to the manufacturer and send you an email confirmation so you have it for your records, will that work for you?” (SV)
- “I will have to contact the distributor, this could take a couple of days for this to happen. Once I hear back from them, I will send you an email detailing the findings. How does that sound?” (SV)
- “I will forward you the quote within the next ½ an hour. I know you wanted to look at it to know what pictures we need. Once you get that please send me back the pictures and I can start the search for you – how does that sound?” (SV)
- “Can I confirm this for you?” (ATC)
- “Would you like me to start this order for you?” (ATC)
- “Would you like me to set this up for you on XX day/time?” (ATC)
- “If I don’t hear from you by XXX, is it ok to call you and see what you have decided?” (ADV)
- “How about if I call you in an hour once I have my research complete and we can firm up your needs at that time?” (ADV)
- “I can send over a quote via email, would it be ok to call you tomorrow after you have had a chance to review it and see if you had any questions?” (ADV)
- “I understand you need to check with XXX, how about I give you a call tomorrow and see if you would like to set this up, would that work?” (ADV)

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Confirm Contact Information

Intent of this Skill:

To obtain or verify a working email address or a good contact phone number for the customer. They can ask for; verify they the information or acknowledge they know the information when asking for the email or phone number.

When to apply this skill:

They may ask/verify/acknowledge at any time during the call.

What does this skill sound like?

The following is a sample list of common ways to execute this skill:

- “Can I get your email?”
- “Can I get your contact phone number?”
- “I have your email (or phone number) in our system, I will send you a quote shortly.”
- “The email I have for you is XX@XX is that still correct?”
- “I have your number, I will call you back shortly”
- “I see the number on caller ID is showing as, XX, is that correct for you?”

Thank the caller

Intent of this Skill:

End every call in a way that shows genuine appreciation for the caller. Customers have choices, so let’s make sure they always know we appreciate them calling us.

When to apply this skill:

Although there are opportunities to thank a customer during the conversation, this “Thank You” is specific to the close of your conversation with the customer.

What does this skill sound like?

The following is a sample list of common ways to ‘Thank the Caller’ within your closing statement.

- “Thank you (customer name) for calling (company name) again my name is (employee name) if you need anything further, please reach out!”
- “Thank you for calling.”
- “Thanks for giving us a call today!”
- “Thank you.”
- “Thanks!”
- “I appreciate your call.”
- “You’re welcome and thank you for calling today!”

Please note – We do not consider “you’re welcome”, “no problem”, “any time”, or “you bet” as true thank you closing statement. They might be a natural way to end a conversation, but they don’t show sincere appreciation for the customer’s call.

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Tone

Intent of this Skill:

To demonstrate genuine engagement and enthusiasm in the call. Convey a true desire to help and care for the customer.

When to apply this skill:

Throughout the entire call from start to finish. To achieve this skill the call must feel friendly and welcoming to the customer.

What does this skill sound/feel like?

- Tone is engaging and welcoming
- Employee demonstrates a desire to help
- Employee is using full sentences and avoids clipped responses
- Employee is avoiding rushed answers, they are not flat or monotone in the interaction. They must not appear irritated, annoyed, or indifferent during the call.