



Call Center Script

2021

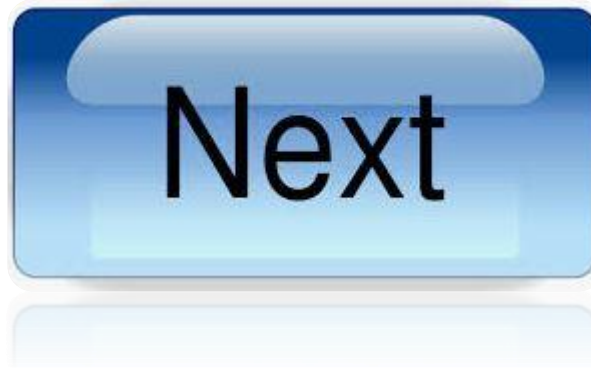


Quick Links



Opening Statement

“Thank you for calling [Insert company name here], this is [agent name], who do I have the pleasure of speaking with?”



○ Wrong Number



Discovery Question

“Thank you [customer name], how can I help you?”

Ready To Schedule



- Service
- Door Quote
- Worry Free Tune Up

Questions Before Scheduling



- Pricing-Service
- Pricing-New Door

Existing Appointment Questions



- Where's My Technician
- Cancel
- Reschedule

Potential Recall



- Issues With Work Performed

\$ Door Sale \$



- Wants To Move Forward W/Estimate New Door
- Door Order Questions-ETA, Cancel, Schedule

Customer Support



- Taking Payment
- Invoice/Estimate Questions
- Special Order Parts Update
- Wants To Move Forward W/Estimate Service



Where's My Technician

“[customer name], let me pull up your appointment and see what's going on. Is this for [insert cx address] address?”

Select Current Job Status

- Scheduled
- Dispatched
- Hold

Things To Remember:

- Check the date/timeframe of the appointment
- Check job summary notes on the date/timeframe and cx's flexibility
- Review job history notes to see if dispatch tried reaching out to customer
- Check Status Of Job: on hold, dispatched, arrived, canceled etc
- Working/Arrived Status: Tech is probably in their driveway or very close to their house

Reschedule Appointment

“[customer name], thank you for giving us a call and letting us know. Let me confirm your information and then I can look at our open availability to review with you”

STEP 1: Go To Appointment & Select Pencil

Icon

Scheduled Appointments 1 Add Appointment Edit

START DATE	ARRIVAL WINDOW	START TIME	END TIME	DURATION
Friday, Nov 19, 2021	8:00 AM - 1:00 PM	8:00 AM	10:30 AM	2 HR 30 min

#341481713-1 | Scheduled Assign Pencil Icon

STEP 2: 'Get Availability' and schedule different day. DO NOT FORGET TO UPDATE JOB SUMMARY NOTES

Edit Appointment ×

Make changes to this appointment. *Required

#341481713-1 | Scheduled

Start Date* Arrival Window* Get Availability

11/19/2021 8:00 AM - 1:00 PM ×

Start Time* 8:00 AM ⌵

☐ Edit Appointment End Time

Technicians ⌵

Serial Instruction Clear Instruction

Where's My Technician-Scheduled

Customer Time Is Still In Current Arrival Window

“I do see that your appointment is scheduled for [date/day] and the technician/product specialists arrival window is between [insert arrival window]. He will be calling you with his ETA once he finishes the job that is directly before yours. The number you called in on, is that going to be the best number for him to call you on when he's in route to your house?”

Customer Time Is Outside Appointment Arrival Window

“I do see that your appointment is scheduled for today and the technician/product specialist's arrival window was set for [insert window]. Do you mind if I place you on hold for a moment so I can check any notes to see if the technician was running behind?”

NOTE TO AGENT: Check job history notes if dispatch or technician has attempted to reach customer. If unsure of reason why tech has not yet arrived, you will call over to dispatch and let them know you are transferring the customer to them so they can check with the technician on their ETA.



Where's My Technician-Dispatched

“It looks like your technician has dispatched himself to your location, so depending on his drive time and traffic he should be there shortly. Is there anything else I can help you with”

Things To Remember:

-Check in job history if technician left customer a vmail to let them know their ETA “[customer name] I see that your technician attempted to reach you [x number of minutes ago] to let you know he is on his way”

Where's My Technician-Hold

“It appears that your appointment was placed on hold. Give me just a second so I can review the notes.”

- Dispatch placed on hold

Things To Remember:

- If there are any calls that dispatch has left, please listen to the call
- Review job history notes

Where's My Technician-Hold By Dispatch

NOTE TO AGENT: After reviewing the notes on the job history and listening to any dispatchers calls, please explain the reasoning to the customer.

Things To Remember:

- Reschedule customer by going to the appointment and selecting the option to 'reschedule' and then select 'Get Availability' to find a new date/timeframe.
- IF UPSET CUSTOMER:** Call over to dispatch to see if they can squeeze them in

Wrong Number

Thought They Called Another Garage Door Company [these are valid leads]:

“You called [Insert Company Name]. We’re a full-service garage door company. What’s the issue with your garage door?”

- Need To Get Back In Contact With Company That Worked On My Door
- CX Provides Info On Issue With Door

Mis Dialed [Non-Garage Door Issue-these are non leads]:

“No worries. Since I have you on the line, we are running a special offer on a garage door tune up for ONLY \$XX [\$XX tune up + \$XX Trip Charge]. The tune up includes tighten and lubricating all moving parts of your garage door as well as a full inspection which is recommended to do annually to stay on top of regular maintenance. Would you be interested in scheduling a tune up?”

- Doesn’t Want To Schedule Appointment
- Wants To Schedule Appointment



Wrong Number-Sticker On Door

“Since you’re calling in from a phone number that is on a sticker that’s on your door, we have acquired that phone number and would be the correct garage door company to help assist you. Let me gather your house # and zip code to see if you’re in our system and if not then I’ll build a profile for you and we can schedule one of our technicians to go out to your house and see what’s going on”

Wrong Number-Internet Search

“Is this for a new work order for your door or related to work that was performed by the other garage door company?”

- Other Garage Door Company-Work Performed
- New Work Order

Wrong Number-Other Co. Worked Performed

“Thank you [customer name], unfortunately you will need to reach out to the company that performed work on your garage door however if anything changes you can always give us a call and for ONLY \$XX we can go out to your house and complete a full inspection on your garage door. Have a great rest of your day.”

Wrong Number-Other Co. New Work Order

“Since your garage door issue is un-related to work that was performed by the other garage door company and I have you on the phone, we’d love to earn your business and for ONLY \$XX we can schedule one of our technicians to go out and do a full inspection and write up a work order as well as review pricing with you when he’s out. If you move forward with our services, I can put in the notes to waive our \$XX trip charge and provide a FREE tune up which is a \$XX value. Can I schedule an appointment for you?”

- **Wants To Schedule Appointment**
- **Doesn't Want To Schedule Appointment**

Wrong Number-Doesn't Want To Schedule Appointment

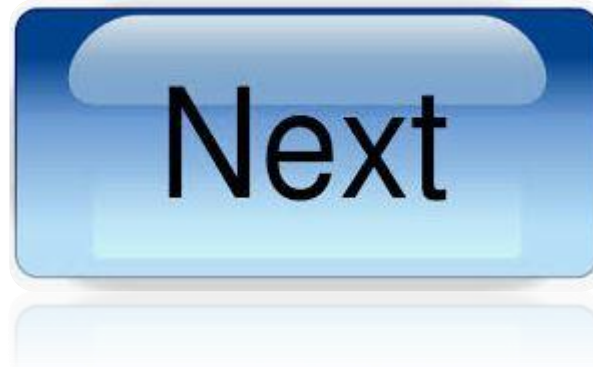
“[Customer Name], that’s not a problem. Please think of [Insert Company Name] for any future garage door needs. Have a great rest of your day.”

Things To Remember:

These calls are considered a valid lead and should be classified as ‘Lead-Customer Did Not Commit’

Upset Customer-Work Performed

“I’m sorry to hear about your concerns. I might be able to help assist and resolve the issue.”



Understanding The Issue

“Let me pull up your invoice and review the work that was performed”

- Double Charged
- Overcharged
- Not Aware Of Charge
- Technician/Product Specialist Complaint
- Garage Door Is Not Functioning Properly

Things To Remember:

- Agent is responsible for reviewing all line items with customer

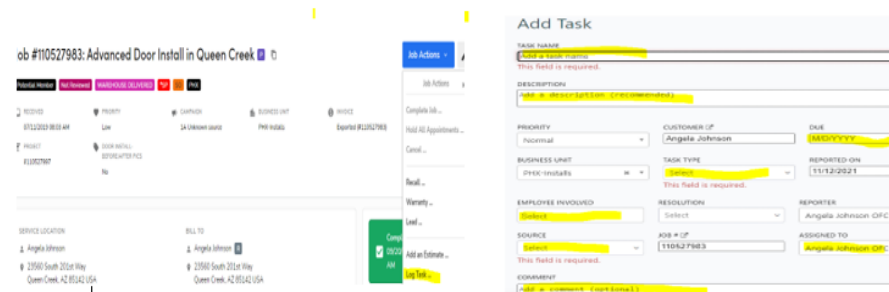
Double Charged/Overcharged/Not Aware Of Charge

“[Customer Name], thank you for calling in and letting us know your concern. What I’m going to do is submit an escalation ticket over to our Customer Support Team. One of my team members will be getting back to you within the next few days. Let me confirm your contact information we have on your account [confirm phone # and email address.]. Let me also provide you with our Customer Support Line if you need to call back. Would you also like for me to text this # to you?”

Instructions To Build Escalation Ticket

STEP 1: GO TO JOB
STEP 2: SELECT 'JOB ACTION'
STEP 3: SELECT 'LOG TASK'
STEP 4: ENTER 'TASK NAME'

STEP 5: SHORT DESCRIPTION
STEP 6: DUE DATE=2DAYS OUT, TASK=ESCALATION, EMP NAME=YOURS
STEP 7: SOURCE=EMAIL, ASSIGNED TO=ANA CASTRO
STEP 8: PUT DETAILED NOTES



The screenshot displays a software interface for managing jobs and tasks. On the left, a job card for job #110527983 is visible, showing details such as location (Queen Creek, AZ), priority (Low), and status (Not Started). On the right, an 'Add Task' modal is open, allowing users to create a new task. The modal includes fields for task name, description, priority, business unit, employee involved, source, and assigned to. Several fields in the modal are highlighted in yellow, indicating required or active information.



Technician Complaint

“[Customer Name], we do appreciate you calling us and letting us know about the experience you had. We’ve worked too hard as a company to attain such high reviews and it’s never our intention of leaving you with a poor experience. What I’m going to do is transfer you over to our [Insert Manager Title] so they can look into this and help resolve the issue. If you get their vmail, please leave a message and we’ll get back to you within a day or two. Before I transfer you, let me provide you with their direct line in case we get disconnected or you need to reach back out to him. His name is [Insert Name] and his # is (XXX) XXX-XXXX

Taking Payment

“I’m sorry to hear about your concerns. I might be able to help assist and resolve the issue.”[Probe if necessary to gather more information]

Special Order Parts

[Note To Agent: Customer may call in wanting to know when we are going to complete their job or move forward with the special order part, they put XX% down on. These customers you would warm transfer to dispatch so they can check the status.

Invoice/Estimate Questions

[Note To Agent: Pull up invoice or estimate and review. You can also email estimates or invoices to customers as well as schedule 'door sale follow up' calls for door estimates or 'service customer call' for service estimate questions. For Invoices related to work performed, pull up invoice and review line items. If they have questions, that you are unable to answer, please submit an escalation ticket and someone will call them back within the next few days.

Wants To Move Forward With Estimate-Service

Review open estimates to confirm which one the customer is wanting to move forward with. Technicians can make modifications when on site to the estimate as far as adding/removing items

INSTRUCTIONS ON CONVERTING SERVICE ESTIMATE:

1. Click on the estimate that the customer is wanting to move forward with
2. Select 'View Opportunity' in the upper right-hand corner
3. Scroll down to locate the estimate the customer is wanting to move forward with
4. Select 'Sold/Convert' (the technician that left the estimate should already be auto populated)
5. Select 'Sold/Convert' below the technician's name .
6. 'Check All' under tasks
7. 'Check All' under materials
8. Select 'Book Job Now'
9. Change Job Type to 'Return Service Job'
10. 'Get Availability' to find the best day/timeframe the customer is wanting us to go out
11. Put clear notes in the job summary eld



Wants To Move Forward With Estimate-New Door

When a Product Specialist runs a 'Door Quote' job, they leave the customer with a few estimates based on what they're looking for. A new door comes with all panels, springs, drums, cables, rails as well as upgrade options that the customer can add on. A handful of customers do NOT decide to move forward with ordering their new door on the first visit with our Product Specialist. IF/WHEN the customer is ready to move forward with ordering their new door, the CSR's job is to convert the estimate into a job, collect the XX% down as well as review our door agreement.

1

Confirm which quote the customer wants to move forward with. (confirm by \$ amount)

2

Click into estimate, then select 'View Opportunity'

3

Click 'Sold/Convert' (Confirm the sold by is the same tech that created the estimate)

4

Click back to job (DO NOT CHECK ANY BOXES)

5

Click on Files, then Scroll to 'New Door Agreement' and click 'Create'

6

Read agreement VERBATIM (Word for Word) to customer and check all appropriate boxes for approval

Before reading the agreement to the customer you should inform them

"This call is being recorded for verification purposes"

7

In signature box at the bottom you will trace OTP (Over the Phone) with your mouse

Select SAVE button to be sure form has saved!!

8

Click into the invoice to collect deposit and 'Add Payment'



Taking Payment

“Is this for work that was performed on [insert job date] in the amount of [insert job \$ amount]. Perfect, let me pull up your invoice, confirm the remaining balance and then after I take your payment, I will also email you the invoice with your payment confirmation”

Step 1:
Go To Customer Page

Joel Cohen

Create Project Sell Membership Add Location

Customers

Residential Type

\$0.00 Balance \$0.00 Credit Available

Not a member

(248) 953-3533 Mobile Phone

2410 Rochester Road, Royal Oak, MI 48073 USA Billing Address

Due Upon Receipt Payment Term

Invoice Signature Required

Forms

Step 2:
Scroll Down To Invoice Section & Click On Invoice

Invoices

Invoice #	Invoice Date	Total	Balance	Status
338597530	11/5/2021	\$0.00	\$0.00	Posted
333545230	11/5/2021	\$1,516.52	\$0.00	Posted
Mobile Check Capture Service today PLUS 50% on door, wanted it all on one check				
	11/5/2021	\$1,516.52		Pending
		\$0.00	\$1,587.25	Pending
Mobile Check Capture Service today PLUS 50% on door, wanted it all on one check				
	11/5/2021	\$1,441.60		Pending

Available Credits (Unapplied Payments)

View offset credits

Total A...	Date	Paymen...	Check / ...	Transact...	Expert ...	Memo	Collect...	Refund Status
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Step 3:
Select 'Collect & Apply Payment'

Invoice #338597530

Save As Template Add to Batch

#338597530 In Progress Completed On Job Type

Advanced Door Install DET-Installs Pending Invoice Date

Due Upon Payment

Unbatched Batch *#338597530 Project

Update payment terms & due date

Update invoice details

Collect and apply payment

Add a task

Add a discount or fee

Add a material

Job Summary

Estimate Length of Job: 225

How many / Preferred installers:

Paint Job required after install, if blank no:

DOOR TEAM DATE ONLY

Job Booking-Research Request form: https://a1garage.com/a/request/

AMARR 338597530-001

Step 4:
Select Payment Type, Amount and then scroll to bottom & select 'submit'

ACH

Bad Debit NSF

Cash

Credit Card

Gift Card

Payment Type

Amount \$1,587.25

Date 11/9/2021

Memo

Business Unit

DET-Installs

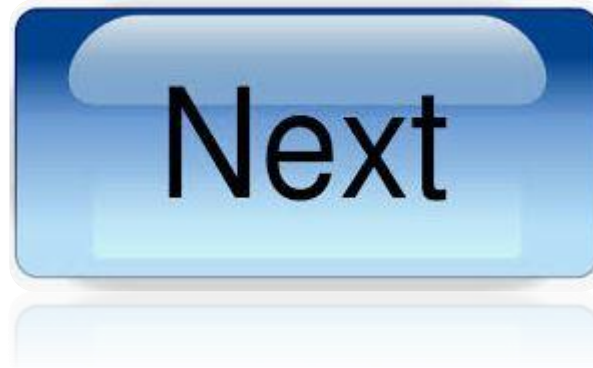
Authorization Code

Credits \$0.00 Credits Available



Empathy Statement

“I’m sorry to hear that” [when applicable]





Appreciation Statement

"I'm glad you gave us a call. I can definitely help you with that!"

- Service Titan Did NOT Pull Up Info
- Service Titan Pulled Up CX Info



Customer Type-Identify

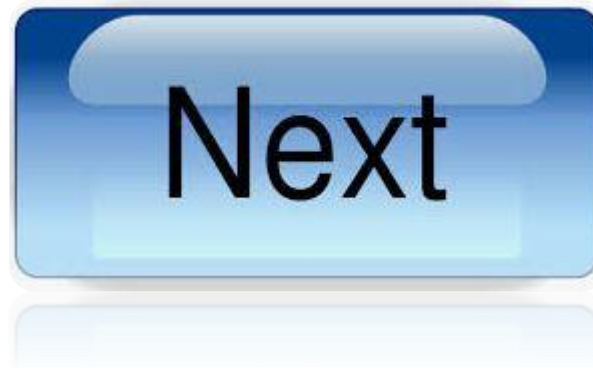
“Have you ever used our services before?”

- ☐ YES
- ☐ NO
- ☐ Not Sure



Appreciation Statement-You Can Never Show To Much Appreciation

“Thank you for thinking of us for your garage door needs”



Timing

“When are you looking for our technician to go out to your house?”

- Provides Availability
- Doesn't Want Someone Out Yet-Questions Before Scheduling

Location

“[customer name], Let me check my dispatch board to look at our open availability. I know we’ve been running a lot of emergency calls and may be a little booked out but let me pull up my dispatch board and go over days and times that we have open, and you can pick what works best for you. Could I start by getting your zip code?”

- **Inside Service Area**
- **Outside Service Area**

Existing Customer

“Is this for [confirm address]?”

☐ YES

☐ NO



Existing-Profile Didn't Pull In

“Thank you. Let me pull up your account. May I start by getting your house number & zip code. [Search in ST & Confirm Full Street Address & Name] “

- Address Pulled Up
- Address DID NOT Pull Up

Instructions

- ENTER HOUSE # (ONLY HOUSE #)
- ENTER ZIP CODE
- SELECT 'SEARCH'

The screenshot shows a web interface with a sidebar on the left containing a 'Manual job' button. The main content area is titled 'Search for service area' and includes a 'City or zip code' input field with a 'Search' button. Below this is a 'Search for customer' section with a 'New customer' radio button. It contains several input fields: 'Name' (with a 'Search name' placeholder), 'Street' (with a 'Search address' placeholder), 'Unit', and 'ZIP Code'. A 'Phone' field is also present with the value '(314)-333-3333'. A yellow circle highlights the 'Search' button in the phone field, which has a red 'X' icon next to it. At the bottom of the form, there are links for 'Overview', 'Property Data', and 'Bids', and a 'Map it' button in the bottom right corner.

Address Did NOT Pull Up-Existing

I'm not locating your account profile. Let me confirm the house # and zip code one more time. I have [repeat back house # & zip code]

I do know that if we serviced your garage door more than 4 years ago, we were working off a different system and your profile might not have pulled over. Has it been greater than 4 years ago?

- 4-+ Years Ago
- Address Pulled Up
- 0-3 Years Ago

New Customer-Timing Not Provided

“I do want to make sure we service your area. Can I start by getting your zip code?”

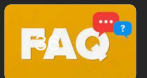
- Inside Service Area
- Outside Service Area



New Customer-Timing Not Provided-Overcome Obj

AGENT NOTE: Select the appropriate rebuttal or navigate to your FAQ button

- Wanting Price Info-Service
- Wanting Price Info-New Door
- I'll Call Back/Think About
- Pricing On Openers
- Wanting To Cancel-Service/Door Quote
- Parts ONLY
- Doesn't Want To Pay \$XX trip Charge
- Door Order Cancel Request
- Time Slot Not Available



Unsure If Used Our Services

“No worries. Let me just double check our system so I don’t create a duplicate profile for you. May I have your house # and zip code.”

- Located Profile
- No Profile Pulled Up

Option 1: Put house # & Zip Code then select 'Search'

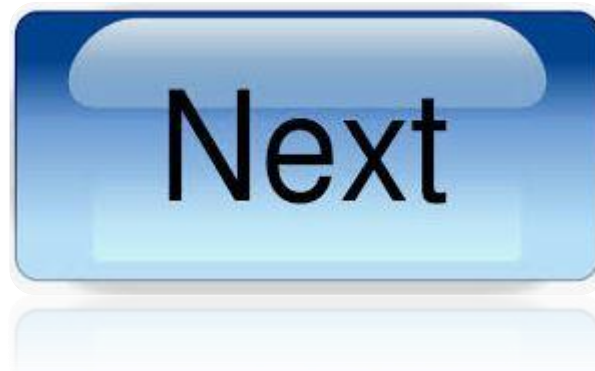
OR

Option 2: Select 'Search' icon top right of ST

The image displays two alternative methods for searching for a customer profile. Option 1 is a form-based search with fields for Name, Street, Unit, ZIP Code, and Phone, and a 'Search' button. Option 2 is a search bar with a 'Search' icon. Both options are connected by a double-headed arrow labeled 'OR'.

Unsure-No Profile Pulled Up

“I’m not seeing that we’ve serviced this location before. I do know that several years back, we were working off a different system so there is a possibility that we have serviced you some time ago. Let me gather some of your information and create a new profile for you. We appreciate you giving us a call again and thinking of us for your garage door needs”




Creating Customer Info-Name

“[customer first name], how do you spell your first name [spell back] and how do you spell your last name [spell back]”

“Are you the homeowner?”

- Homeowner
- Non-Homeowner

Where will the service be performed?

 Name of tenant or location...

 Address... 

Unit...

 MobilePhone ... Memo... x


☒ Job Notifications

 Email ... Memo... x +

☒ Job Notifications

 Save Go back

Who will pay for the job?

 The customer is the same as the tenant ▾

Residential Commercial



Non-Homeowner

“Who will be the responsible paying party?”

- Homeowner
- Tenant
- Property Management Company



Homeowner Paying

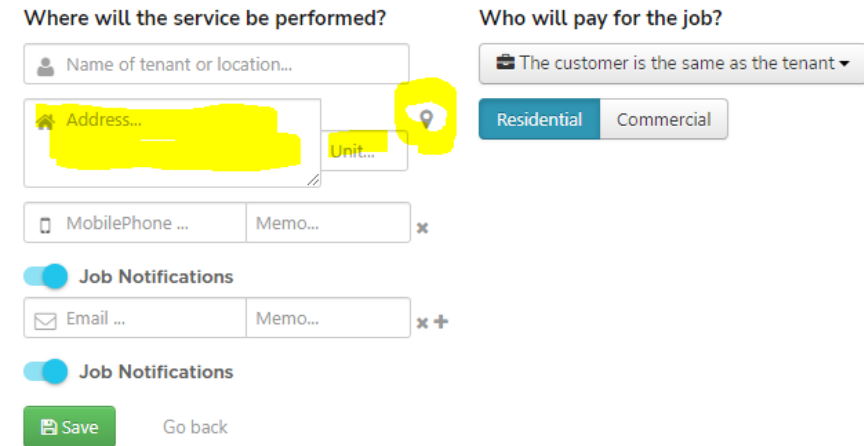
“Thank you. Will you be letting our technician into the garage, or will we be meeting the homeowner for the appointment at the property?”

- Meeting Tenant/Non-Homeowner
- Meeting Homeowner



Homeowner-Address

“What is the address we’ll be sending our technician/product specialist to?”



The screenshot shows a web form for entering service details. The form is divided into two main sections: 'Where will the service be performed?' and 'Who will pay for the job?'. In the first section, there are fields for 'Name of tenant or location...', 'Address...' (highlighted in yellow), and 'Unit...'. Below these are fields for 'MobilePhone ...' and 'Memo...'. There is also a 'Job Notifications' section with an 'Email ...' field and another 'Memo...' field. In the second section, there is a dropdown menu for 'Who will pay for the job?' with the option 'The customer is the same as the tenant' selected. Below this are two buttons: 'Residential' and 'Commercial'. At the bottom of the form are two buttons: 'Save' and 'Go back'.

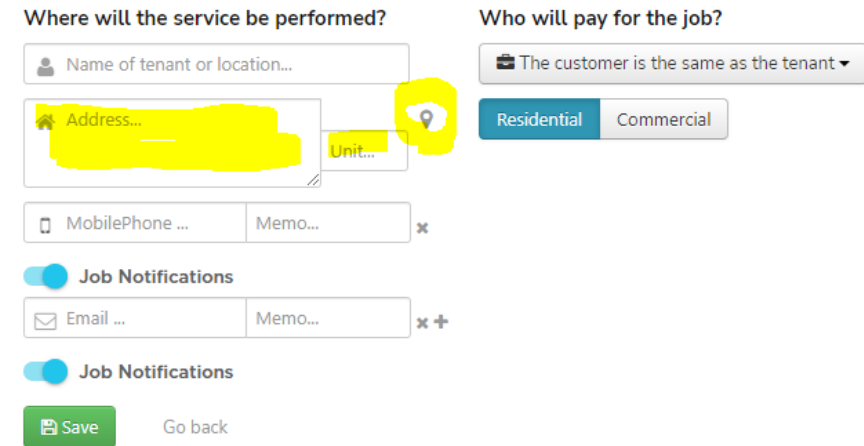
Note To Agent: No need to input city/state. Just enter house #, street name and zip code. From there, you select the location icon to validate. If it does NOT come up OR it is a similar address but not exact you will repeat the address (correct if necessary). If still not showing, you will select ‘manual’ and enter the full address including city/state. If creating a manual address, you will want to include this in the job summary notes and indicate address wouldn’t validate and input major crossroads.

Next



Tenant-Address

“What is the address we’ll be sending our technician/product specialist to?”



The screenshot shows a web form with two main sections. The first section, titled "Where will the service be performed?", contains fields for "Name of tenant or location...", "Address..." (with a location pin icon), and "Unit...". Below these are fields for "MobilePhone ..." and "Memo...". The second section, titled "Who will pay for the job?", has a dropdown menu showing "The customer is the same as the tenant" and two buttons: "Residential" and "Commercial". At the bottom, there are two "Job Notifications" sections, each with an "Email ..." field and a "Memo..." field. A green "Save" button and a "Go back" link are at the bottom of the form.

Note To Agent: No need to input city/state. Just enter house #, street name and zip code. From there, you select the location icon to validate. If it does NOT come up OR it is a similar address but not exact you will repeat the address (correct if necessary). If still not showing, you will select 'manual' and enter the full address including city/state. If creating a manual address, you will want to include this in the job summary notes and indicate address wouldn't validate and input major crossroads.

Next



Tenant-Phone Number Capture

Things To Remember

- '-' '+' sign allows you to enter additional phone #'s or email addresses


- Clicking cell phone icon


- Put CX's name in 'memo' field

“The number you call in on ending in [last 4 digits of phone #], is this the best # for our technician/product specialist to call when he’s in route?”

“Is this your cell phone?”

Where will the service be performed?

 Name of tenant or location...

 Address...  Unit...

 MobilePhone ...  Memo... x


☒ Job Notifications

 Email ... Memo... x +

☒ Job Notifications

 Save Go back

Who will pay for the job?

 The customer is the same as the tenant ▾

Residential Commercial

Next



Tenant-Bill To Build Out

Things To Remember

-Don't forget to place the appointment on hold after scheduling and then attempt to call homeowner with a follow up text message if they don't pick up

“Since you are not the responsible paying party, I’m going to need to gather the Homeowners/Responsible Paying Parties information. You and I will go over our open availability to go out so you can let us in and then I’ll need to place the appointment on hold until we can reach the homeowner/responsible paying party so they are aware we are coming out and that they are aware there is a \$XX trip charge and confirming that we will get work authorization over the phone as well as any additional payment. Do you have the homeowners information?” [Note to agent: You will fill out the ‘who will pay’ section]

Where will the service be performed?

Joe Smith

123 Whatever St Unit...

Phoenix AZ

85040 USA

Latitude Longitude

(999) 999-9999 Joe-Tenant

Job Notifications

Email ... Memo...

Job Notifications

Who will pay for the job?

The customer is different from the tenant

Name of billing customer...

Residential Commercial

Address... Unit...

MobilePhone ... Memo...

Email ... Memo...

Job Notifications

Next



Phone Number Capture

“The number you call in on ending in [last 4 digits of phone #], is this the best # for our technician/product specialist to call when he’s in route?”

“Is this your cell phone?”

“AND your email for invoice or estimate purposes?” [say/spell back]


Things To Remember


- '-' '+' sign allows you to enter additional phone #'s or email addresses

- Clicking cell phone icon

- Put CX's name in 'memo' field

Where will the service be performed?

 Name of tenant or location...

 Address...  Unit...

 MobilePhone ... Memo... x


☒ Job Notifications

 Email ... Memo... x +

☒ Job Notifications

 Save Go back

Who will pay for the job?

 The customer is the same as the tenant ▼

Residential Commercial

Next



Scheduling Appointment-Market, BU, Job Type

Job Type's



Step 1-Market Info.

Know What Market You're Booking The Job For

85142 → Search

Match PHX-OUR show room is OPEN
PUBLIC By Appointment or Walk In
crossroads are 32nd St. & Broadway

Search for customer [New customer](#)

Name	Street	Unit	ZIP Code
<input type="text" value="Search name"/>	<input type="text" value="Search address"/>	<input type="text" value="Unit"/>	<input type="text" value="Zip"/>

Phone Search

Step 2-Business Unit

Select 'Search' icon top right of ST

Overview [Property Data](#) [Beta](#)

Job Type *

Business Unit *

Door Sales=New Door Quotes

Floor Coating=Floor Coating Quotes

Installs=ONLY use when 'recalling a door install'

Service=Service-related jobs

PHX-Door Sales
PHX-Floor Coatings
PHX-Installs
PHX-Service
phx

Step 3-Job Type

Make sure you know what job type you should be using

Job Type *

Business Unit * PHX-Service

Marketing Campaign *

Priority *

Service

- Emergency Service (Car Stuck/Door Off Track)
- Groupon/AAA/Deal Of The Day/Living Social
- Service Customer Call
- Service
- Value Card/iTrade
- Worry Free Club Job

Sales

- Door Sale Follow Up
- Phone Quote
- Door Customer Call
- Door Quote-Custom
- Door Quote-Standard

Next



Scheduling Appointment

- Time Slot Not Available

Step 4-Calendar Look Up 'Get Availability'

Select 'Get Availability' and review dates/timeframes with customer. Custom window should ALWAYS be selected if the customer is looking for a shorter window than 8-1 or 1-6. You would then manually put in the start time and end time

The screenshot shows a scheduling form with the following fields and elements:

- Start Date ***: A date input field containing "11/18/2021" with a calendar icon.
- Arrival Window ***: A dropdown menu with "Get Availability" selected and highlighted in yellow.
- Start Time ***: A time input field with a placeholder "hh:mm am" and a dropdown arrow.
- Custom Window**: A text input field below the main form, also highlighted in yellow.

Next



Scheduling Appointment

Get Availability

Today

< 11/18/21 - 11/24/21 >

THU 18	FRI 19	SAT 20	SUN 21	MON 22	TUE 23	WED 24
				6:00a - 8:00a 0% full	6:00a - 8:00a 0% full	
	8:00a - 1:00p 11% full	8:00a - 1:00p 0% full	8:00a - 1:00p 10% full	8:00a - 1:00p 11% full	8:00a - 1:00p 2% full	8:00a - 1:00p 2% full
1:00p - 6:00p 6% full	1:00p - 6:00p 0% full	1:00p - 6:00p 4% full	1:00p - 6:00p 7% full	1:00p - 6:00p 5% full	1:00p - 6:00p 4% full	1:00p - 6:00p 3% full

○ Time Slot Not Available

Next

THINGS TO REMEMBER

- 1.If that date is NOT available, then DO NOT manually override and select the date section when booking the job [This is ONLY done IF dispatch approves]
- 2.You will be presented with either 8AM-1PM/1PM-6PM open availability or one of the time slots
- 3.When you hover over the time block you'll see 'i' in the scheduling area which allows you to see which technicians work that day [use this option when scheduling recalls, converting service estimates or upon customer requesting a certain technician]
- 4.If a customer CAN NOT do anyone of those time frames, you can select 'Custom' in the time frame drop down [example: 10AM-3PM]
- 5.You are allowed to shorten the 5 hour window down to 3 hours without consulting dispatch (this would be a custom window)
- 6.It should be seldom that you are using a custom window
- 7.If a customer seems concerned about have a 5 hour window, you would just let them know the technician will call when they're in route so as long as they answer their phone and stay close to their house they are good
- 8.DO NOT schedule an appointment in a 'LIVE' window (unless consulting dispatch)



Scheduling Appointment-Job Summary

1. What is the issue? [input what's going on with the garage door and include any additional pieces of information that you feel would be valuable for the technician to know]
2. Was any pricing reviewed including any coupons? [If you've mentioned the \$XX trip, if a customer has mentioned they have a coupon, if a level 2/manager has provided any additional pricing etc., if we are waiving trip charge if they move forward or even if Management has approved waiving the cost for recalls outside labor warranty]
3. When was the last time they had the garage serviced? [input what the customer says. This is important for the technician to know if another garage door or customer has worked on the door and approx. when. If customer is uncertain or indicates 'it's been awhile/long time' then that's what you put]
4. Have they ever used us before? [VERY IMPORTANT-If it's related to the work we did put that information. If it's not related to work we performed put that info as well]
5. Are they the homeowner? [If they are not the homeowner make sure you are reviewing applicable cost for us to roll the truck and that you've included that under the 'price' question. This area is also where you would put who the technician is meeting and confirm who's the responsible paying party]
6. Any special instructions to help the technician find the house like a gate code? [anything the customer may say regarding special instructions etc should go in here]
7. What date/Time slot commitments were given? [What you put in this section should match what you have selected on the calendar. IF you are 'rescheduling' a job, you would need to go into the job summary notes and update this section as well]

Next



Scheduling Appointment-Tags

Tagging A Job

- Morning: If a customer wants earlier window within 8am-1pm timeframe (DO NOT OVER PROMISE)
- Custom Window: ANYTIME you're not booking a full window
- Afternoon: If a customer selects 1pm-6pm but would prefer the earlier part of the window (DO NOT OVER PROMISE)
- \$129 ER: When you are booking an ER after hours service (MUST GET APPROVAL FROM DISPATCH)
- Time Restriction: When booking job when less than 3 hour window, or any type of time restriction (REQUIRED DISPATCH APPROVAL if less than 3 hr window)
- Bumped/Rescheduled: Customer has had their job on hold and we have rescheduled
- Urgency List: Urgent job that a customer would prefer an earlier day/timeframe if it opens up
- Tagging Technician: Recalls, customer is requesting a certain technician or when converting a service estimate

How To Add Or Remove Tags

There are times that you may have forgotten to place a tag on a job you built and need to go back into the job and add one. There may also be jobs that you're rescheduling or recalling where you may need to remove tags that are no longer applicable.

1. Select The Pencil Icon To The Right Of The Blue Action Button
2. At The Top Are All The Tags
3. To Add A Tag You Would Just Start Typing In An Open Field Within The Tag Section And Then Click On The Tag When It Comes Up
4. To Remove A Tag You Simply Click The 'X'

Tags

*2 ×

PHX ×

Potential Member ×

Next



Process The Booked Job

☒ Send booking confirmation

☒ Customer signature on invoices required for this job.

Close and classify

Create fake jobs

Build estimate

Book job

Congratulations, You've Booked A Job
\$\$\$\$\$\$\$\$\$\$



Service or Sales

○Service Job

○Sales



Service

- Emergency Service (Car Stuck/Door Off Track)
- Groupon/AAA/Deal Of The Day/Living Social
- Service Customer Call
- Service
- Value Card/iTrade
- Worry Free Club Job



Sales

- Door Sale Follow Up
- Phone Quote
- Door Customer Call
- Door Quote-Custom
- Door Quote-Standard

Job Type-Sales



Door Quotes

- Cost: Free [To Go Out & Review Options] [New Door Prices Varies Based On What Customer is Looking For]
- Who: Product Specialist
- What: Measure Opening, Review Options, Provide Estimate

Door Sale Follow Up: Anytime a customer has questions on new door estimates. These jobs can be face to face OR a Phone call. When scheduling with this job type, please specify in the job summary notes if it's just a phone call or if the customer is looking for them to come back out to their house.

Phone Quote: This job type is 'over the phone'. This is when a customer is not interested in having us come out to their house yet and wants to talk to someone about pricing. NOTE TO AGENT: Make sure you've followed the 'What Does It Cost For A New Door' FAQ. This FAQ will walk you through the 1st attempt and 2nd attempt rebuttal to explain the value of us going out to review options and pricing.

Door Quote-Custom: Use this job type when you're scheduling a FREE Door Quote for a product specialist to go out and review options & pricing. You use this one 'Custom' if the customer mentions they are looking for custom solutions. If they don't mention custom, then you would schedule as a Standard.

Door Quote-Standard Use this job type when you're scheduling a FREE Door Quote for a product specialist to go out and review options & pricing. You use this one 'Standard' if the customer does NOT mention that they are looking for custom solutions/options.



Zip Code Search-Not In Area

“I apologize; however, it looks like you’re on the outskirts of our service area, so I won’t be able to schedule a technician to go out and service your garage door.”

- Upset That We Don’t Service Their Area

Zip Code Search-Not In Area- Upset

“[customer name], we only have a certain number of technicians and they are assigned service areas based on their home base area. We are ALWAYS recruiting the best of the best technicians and as we grow, our service areas will grow as well. Again, we apologize that we are unable to schedule a time to go out”

Existing Customer-Same Address

“Thank you. Is this for a new work order?”

- NEW
- EXISTING

Existing Customer-New Location

“Is this a new location we’ve never serviced, or do I need to look up another address we’ve serviced in the past?”

- NEW
- EXISTING



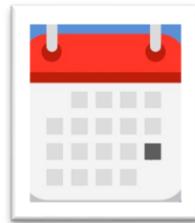
Existing Customer-Different Location

“Thank you, let me pull up your account. May I start by getting the house # and zip code”

“When are you looking for us to go out and take a look at your garage door?”



Launch ‘get availability’ & review dates/timeframes



Existing Work Order

Things To Remember:

- Review Invoice Line Items
- Review job notes from technician

“Let me pull up your previous work order so we can see what we did when we went out.”

○ SERVICE RECALL

○ INSTALL RECALL

Door Order Questions

“You actually called the appointment line to schedule an appointment. I might be able to help answer your questions. If not, I will get you over to the correct department to further assist you”

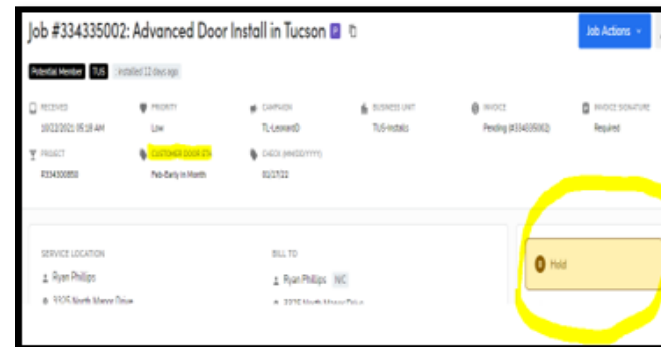
- Checking Door Install ETA-Ready To Schedule, Wanting ETA
- Questions On My Invoice
- Request To Cancel Order

Door Order ETA

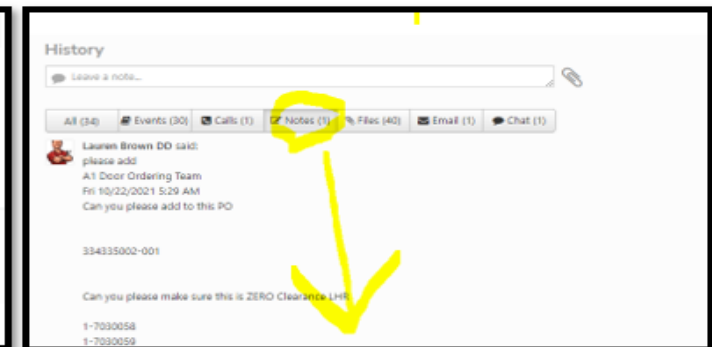
“Let me pull up your account and check for any updates. Do you mind if I place you on hold for a moment?” [Agent to review job notes and ETA on Door Install] Inform customer of update

- Waiting on ETA from Vendor
- Ready to Schedule
- Onsite Scheduled
- Scheduled
- Early in Month/Mid Month/End of Month

TOP OF JOB-CUSTOMER DOOR ETA



BOTTOM OF JOB-UNDER HISTORY, SELECT 'NOTES' AND REVIEW FOR ANY UPDATES



Early in Month / Mid Month / End of Month

This provides us information on when we are anticipating the door to arrive from the manufacturer

“[customer name], it looks like we are anticipating getting your door in around [provide customer with information at top of job]. As it approaches and we’ve confirmed we have your door in our possession, we will schedule a day that works best for you. Let me make sure you have the Door Departments direct phone number in case you need to call us back or have any additional questions.

“Would you like for me to text you their number as well so you have it for future use?”

○Upset About Turn Around Time/Communication



Upset About Turn Around Time

“[customer name], I’m sorry and I know this can be very frustrating for you. It’s frustrating for us as well. Suppliers are very backed up and on short supply and high demand during these trying times. All company’s and their customers are having the same issues. We will be keeping in contact with you every few weeks to keep you informed and once we have possession of your door we will schedule a day that works best for you. Let me make sure you have the Door Departments direct phone number in case you need to call us back or have any additional questions.

“Would you like for me to text you their number as well so you have it for future use?”

- Customer Still Upset
- Wants To Cancel Their Order

Still Upset-Turn Around Time

“Again, we apologize for the delay with your door install. What I’m going to do is transfer you over to our Door Department Team so they can see if there are any newer updates on your order from our supplier. If you reach their voicemail, please leave a message and they will call you back. Do you need for me to provide you their direct number again in case we get disconnected or you need to follow back up regarding the status of your door?”

Door Order-Questions On Invoice

Schedule 'Door Sale Follow Up' under 'Door Sales' and tag the product specialist/technician that sold the door. Put clear notes in the job summary on the questions that the customer has.

Service Recall

Things To Remember:

- 0-90 Days=Recall Previous Job Completed
- 90-+ Days=Create New Job

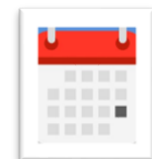
“[customer name], if the issue is related to the original work we’ve completed within 30 days, there is NO COST for us to come out and resolve the issue. If it’s related BUT outside our 30-day labor warranty, the customer is responsible for paying our \$XX Service Call Fee. When we go out, we will be able to identify if it’s related to the work we performed or a faulty part. If it’s not related, then you’re only responsible for paying our trip charge of \$XX and the technician will write up a work order of what needs to be done and review any pricing with you.”

“When are you looking for us to go out and look at your garage?”



○UPSET ABOUT PAYING FOR US TO GO OUT

Launch ‘get availability’ & review dates/timeframes



Install Recall

Things To Remember:

- 0-12 Months=Recall Previous Job [install recall]
- 13-24 Months=Recall Previous Job [service recall]
- 25+ Months=New Service Job

“[customer name], if the issue is related to the original work/parts we’ve installed, there’s no cost to go out and get the issue resolved IF it’s within the 1-year parts and labor warranty. If you’re outside our 1-year parts & labor warranty, there is a \$XX service fee.”

“When are you looking for us to go out and look at your garage?”

○UPSET ABOUT PAYING FOR US TO GO OUT

Launch ‘get availability’ & review dates/timeframes



Recall-Upset About \$XX Service Fee

“[customer name], I’m not authorized to waive our Service Call Fee if you’re outside your labor warranty. It could be un-related and if that’s the case you are ONLY responsible for paying our \$XX trip charge for the technician to complete an inspection and isolate if it’s related or not. If it’s related, then the only cost would be our \$XX trip charge and \$XX min. labor. Are you wanting us to come out and look at what’s going on?”

○REFUSING TO PAY

Refusing To Pay \$XX

“As mentioned, I’m not authorized to waive the \$XX Service call fee if it’s related and you’re outside your labor warranty. What I can do is place you on hold and see if I can get authorization to waive the service call fee IF it’s related to the work we performed. Do you mind holding?”

Existing Customer- New Location II

Things To Remember:

- When You're on the booking page, you will highlight the customer's name
- Above the customer's name, you will see that it will say 'Add Location'

“OK, thank you. I'll be adding this new location to your customer profile. Let me gather the full address that we will be sending our technician to”



“When are you looking for us to go out and look at your garage?”

Launch 'get availability' & review dates/timeframes



Existing Customer-New Job

Things To Remember:

- Confirm customer information
- Be prepared to use FAQ or Rebuttal Guide

“Thank you for giving us a call & thinking of us again for your garage door needs.
When are you looking for us to go out and look at your garage door?”

LAUNCH ‘GET AVAILABILITY’ &
REVIEW DATES/TIMEFRAMES



Rebuttals

- Wanting Price Info-Service
- Wanting Price Info-New Door
- I'll Call Back/Think About
- Pricing On Openers
- Wanting To Cancel-Service/Door Quote
- Parts ONLY
- Doesn't Want To Pay \$XX
- Door Order Cancel Request
- Time Slot Not Available

FAQ's

- Do You Do Panel Replacement
- Troubleshooting Over The Phone
- How Much To Program My Remote
- Are You Local/Where Are You Located At
- Cost For Purchasing A Remote
- When Do I Mention The \$25 Trip Charge
- Cost For Keypad or Wall Button
- What's Involved With Your Tune Ups
- What Calls Would I Call Dispatch For
- Do You Carry A Specific Part
- I Need My Garage Door Serviced ASAP, But Also Need To Order A New Door
- Not Sure If My Door Can Be Fixed Or Need To Purchase A New Door
- Upset That I Haven't Received My Door But I'm Making Monthly Payments
- Is Your Trip Charge Free/I Have A Coupon For Free Estimate
- Time Slot Not Available



Do You Do Panel Replacements

Things To Remember:

This price includes; new panels, rails, rollers, springs, cables, drums..all parts except the opener

“Yes, we do panel replacement and there’s no cost for us to go out and look at your panel. We will need to check with the manufacturer to make sure they still make your panel style. While we’re out there we will also review some pricing for a new garage door, how soon are you looking for us to come out?”



Time Slot Not Available

“[customer name] We have open availability any time after [insert day] however, to say THANK YOU for your patience I’m adding a FREE TUNE UP which is an \$XX value if you move forward with our services, I’m also going to put you on our URGENCY LIST so if we have a cancellation or are able to get out to your house sooner, we will give you a call. ALSO, I’m putting in notes that even if we’re able to get out sooner, we will still honor your FREE Tune up if you move forward with services. Can I reserve your appointment slot for [inset first available]?”

○Customer Objects To Urgency List

Things To Remember:

- Free Tune up does NOT apply to Tune Up Jobs
- You MUST put the FREE Tune Up IF moving forward with work in the job summary notes
- You MUST place ‘Urgency’ tag on job



Customer Objects To Urgency List

“[customer name], let me place you on hold and check with dispatch to see if we’ve had any cancellations and are able to squeeze you in sooner. Do you mind if I place you on hold?”

Things To Remember:

DISPATCH APPROVED SQUEEZING IN WHEN CAPACITY BOARD WAS FULL: Include detailed job notes indicating that market was at capacity/overbooked however dispatch approved [insert dispatchers name that approved]

IF UNABLE TO BOOK: Call classification would be ‘Time Slot Not Available’ and you would put clear notes. Market Name, Dispatcher You Asked For Approval From and First Available date we can get out there (The date you would put in your classification notes would be the first available date dispatch provided to you)



Cost-Keypad/Wall Button

“Our trip charge is ONLY \$XX to go out and do a full inspection. We first want to make sure our (Wall Button or Keypad) is compatible with your unit/opener. If our universal keypad/wall button is compatible the cost is [Keypad=\$XX/Wall Button=\$XX] and to install and to sync. would be our minimum labor rate of \$XX. As mentioned, we’re going to first start with our inspection for \$XX to make sure our keypad/wall button will sync. to your existing opener. If you move forward with any of our services, we’ll also provide you a FREE tune up (\$XX value).

☐Wants To Schedule Appointment

☐Not Interested



Cost-Keypad/Wall Button-Not Interested

“We’d love to earn your business and at least go out there for ONLY \$XX to confirm if your existing opener can support a newer keypad. Generally older openers that are close to 10 years old, have a hard time sync. Due to the newer technology. During our inspection, we will also look over your entire door to give you piece of mind. Can I schedule you for an appointment?”

IF STILL NO: “OK, no worries we appreciate you giving us a call and if anything changes feel free to give us a call back”

- Wants To Schedule Appointment



Troubleshooting Over The Phone

“I can actually do better than that. I can schedule one of our technicians to go out to your house to look at what’s going on. They arrive with an almost fully stocked truck so they can jump into any repairs if you sign off on the work order. Our trip charge is ONLY \$XX, and they’ll do a safety inspection. How soon are you looking for us to go out and look at what’s going on?”



How Much To Program My Remote

“I can certainly get one of our technicians out to your house to program your remote. We do have a \$XX trip charge and then the programming of your remote is our minimum labor of \$XX. When we go out, we’ll also do a full safety inspection on your garage door and come with an almost fully stocked truck in case there’s anything else you might want us to take care of for you. How soon are you looking for us to go out and program your remote?”



Are You Local/Where Are You Located At

ARE YOU LOCAL? “Yes, we are local. All our technicians work in their local community and come into the warehouse once a week to fill up their trucks. Our warehouse isn’t open to the public. [Note To Agent: Use an assumptive close]

WHERE ARE YOU LOCATED AT? “I work out of the main scheduling and dispatch office out of [Insert City]. All of our technicians work in your local community. We just help lift the burden of the administrative tasks so they can focus on supporting the customers out in the field.”



Is Your Trip Charge Free/I Have A Coupon For A Free Estimate

“I’m glad you received our free estimate coupon. Right below where it says, ‘Free Estimate’ it should say ‘call for details’, correct? I’m glad you gave us a call. That’s for our new door quotes are you looking for a quote on a new garage door?”

IF YES: Fantastic, when are you looking for us to schedule a Product Specialist to go out and meet you?

IF NO: Our trip charge for service/repair is ONLY \$XX and we will do a full safety inspection and will not perform any work unless you sign off on the work order. How soon are you looking for us to get out to your place to look at your garage door?”

IS THE TRIP CHARGE WAIVED/ABSORBED IF I GO WITH YOUR SERVICES?

1st Attempt: “The trip charge is a mandatory charge that covers us rolling an almost fully stocked truck to your location and performing a safety inspection. Most home service company’s charge upwards of \$75-\$100. When are you looking for us to go out and see what’s going on with your garage door?”

2nd Attempt: “We don’t want to lose business over \$XX, I can waive the trip charge if you move forward with our services. If not, we do kindly ask for you to pay the \$XX trip charge since we rolled an almost fully stocked truck, and our technician performed a full safety inspection on your garage door. Our customers find that this is a fair request.”



Cost For Purchasing A Remote

Did customer purchase opener from [Insert Company Name]?

- Purchased Opener From [Company]
- Did NOT Purchase Opener From [Company]



Cost For Purchasing A Remote-Purchased Opener From Company

“You have 2 options. The first option is we can schedule a technician to go out and provide you another remote and program it for you. This cost is \$XX [\$XX trip, \$XX min. labor, \$XX remote]. The other option is since we installed the opener and have all the information (make/model of unit) I can have my Manager give you a call back and you can pay for the remote over the phone for around \$XX; however, you would need to program it. Do you prefer that we schedule a technician to go out or do you want to purchase the remote over the phone and we can mail it out to you?”



Cost For Purchasing A Remote-Company Did NOT Install Opener

“I can definitely help you with that. When are you looking for our technician to go out and look at your opener?” If Customer Has Questions On Pricing: “Our trip charge is ONLY \$XX to go out and do a full inspection and to roll an almost fully stocked truck to your house. Our remotes around \$XX and to sync. would be our minimum labor rate of \$XX. We’re going to first start with our inspection for \$XX to make sure our remotes will sync. to your existing opener. If you move forward with any of our services (including just purchasing a remote and sync. the remote) we’ll also provide you a FREE tune up (\$XX value). Is there a certain day that works best for you for us to come out?”



When Do I Mention The Trip Charge

- The customer asks directly if there is a cost to come out
- The customer is inquiring about pricing (for anything)
- Customer mentions they have a coupon
- Customer is mentioning they are looking for estimates/quotes (on repairs/openers)



What's Involved With Your Tune Ups

During a tune up we will tighten and lubricate all moving parts of the garage door!

- Lubricate all hinges, bearings, and overhead door torsion system parts
- Adjust opener as needed for proper travel and function
- Adjust and torque any loose brackets, mounts and fasteners
- Inspect adjust, and lubricate all belt/chain drive openers as needed
- Inspect cables for signs of fraying
- Test and align all safety systems for function and adjust as needed



I Need My Garage Door Serviced ASAP, But Also Want To Order A New Door

- The technician will get their garage door up and running with cost savings in mind
- Book applicable job type and make clear notes. The customer will be responsible for paying the \$XX trip charge plus any service/repair costs however we will do our best to keep these costs to a minimum to get them by until their new door installs
- Job Detail Notes; Make sure you place clear notes in job details letting the technician know that this customer has an upcoming new door install so they should get their garage door up to get them by until door is installed

Things To Remember:

If and when you get a customer that has a scheduled NEW DOOR INSTALL, but they are needing service to get them by until the new door is installed, you do NOT need to transfer to Door Department. Please follow directions below; Inform customer



Not Sure If My Door Can Be Fixed Or If I Just Need To Purchase A New Door

“I can do 1 of 2 things. I can schedule one of our Product Specialist technicians to go out and it’s absolutely FREE. They would be able to provide you an estimate on a new door however they are unable to provide a quote on service or repair and they do not come with a fully stocked truck to make any repairs. The other option is to send one of our service technicians to your house so they can provide you an estimate on repairs as well as provide a quote on a new door. Our trip charge for our service technicians is ONLY \$XX. Would you like for me to schedule one of our Product Specialists to come out at no cost OR for ONLY \$XX, I can schedule one of our technicians?”

Things To Remember:

Customer isn’t sure if the door can be repaired or if he has to replace it. At times, you may run into customers that are wanting a quote on a new door as well as possible estimate on repair (customer is undecided and if they can save cost on repair that’s the way they want to go). In those cases, you should educate the customer on the 2 types of technicians that we can send out. See below on how you should present this to the customer



Which Calls Would I Call Dispatch For

Any customer with one of the below needs calls please call dispatch

- Customer is calling in to check the status of special-order parts they have ordered or are waiting for a technician to get back with them on
- Customer has been waiting for technician to call them back and no one has called back yet
- Dispatch has rescheduled their job and they are calling back in
- Customer is upset 'Where's my tech'! These are the ones that were scheduled for example 8am-1pm and it's after that time slot and no one is there....
- No open availability and customer is wanting sooner than cap board shows [ONLY FOR Car Trapped or Door Stuck Open]

Please do NOT get confused with 'I missed a call from this number' or you can clearly see that the technician has dispatched themselves and is on the way (these are quick calls).



Do You Carry A Specific Part

Things To Remember:

We NEVER want to over-promise we will have that exact part on our truck; however, we carry 98% of garage door parts on our truck. Always make sure you're setting clear expectations with the customer, so they aren't upset if we go out and don't have that part with us. When you run into these situations, please follow the outlined responses below

1st Response: We have the parts on up with one of our technicians, and he can get out there and get your garage door issue hand in our trucks to complete 98% of the jobs are technicians go to on the first visit. Let me get you set taken care of. Let's get you on the schedule.

2nd Response: We will still come out there and see if we may have a different part that will work. If that isn't the case, we are setup with every Major Manufacturer and can verify that is the exact part that is needed and typically return within a few days to install it. You would be surprised how many customers call in saying they need XYZ part, and it turns out to be something different. That is why we always send out a technician out to assess the situation. I can get the technician out there as soon as

3rd Response: I can definitely understand that and we don't want to waste your time, or our time either, but we have found a lot of the time when customers call with a very specific part request, it turns out to be something different that is needed. We really believe in putting eyes on the problem, running the system through a series of tests, to then determine what parts are needed for a repair. If you really don't want me to send a technician out, let me gather some of your information and call you back once I have confirmation on the part you're requesting



Upset That I Haven't Received My Door But I'm Making Monthly Payments

Let the customer know we are working with our manufacturers to get that customer's door in as soon as possible, but unfortunately, the current supply chain issues are causing major disruptions for every industry, including ours. You were a smart consumer and took advantage of the financing we offer whereas other customers that didn't use financing had to pay a XX% deposit up front. In almost every case, the total due from a month or 2 of finance repayment is going to be significantly less than they would have had to shell out had they not used financing and put a XX% deposit down. I have found this usually makes a ton of sense to customers and they are almost immediately less upset about this.



Price Info-Service

Things To Remember:

Pricing should NEVER be an objection! The focus is on the quality of our parts and workmanship-REQUEST SUPPORT FOR PRICING IF YOU'VE USED YOUR ATTEMPTS

1st Attempt: When are you looking a technician to go out and go over pricing?

2nd Attempt: It is ONLY \$XX trip charge for us to do a full inspection which is recommended to do annually to stay on top of regular maintenance. They will come with an almost fully stocked truck so after the inspection and review of the work order, if you sign off, they are ready to jump into any necessary repairs. Is there a certain day that works better for you for us to come out?

3rd Attempt: [Insert Customer Name], let me place you on hold and see if I can get a Manager to further assist you. As mentioned, it does depend on a few factors. I'll be back on the line with you in a minute.



Price Info-New Door

Things To Remember:

Focus On FREE! Focus on Accurate Pricing!! If customer is still not interested in having someone come out, then book a 'Phone Quote' under Door Sales & let them know that someone will call them back within the next 1-2 days.

1st Attempt: When are you looking for our Product Specialist to go out and go over pricing?

2nd Attempt: “Prices do vary based on the size, style, headroom and budget. Let me get some of your information and schedule one of our product specialists to go out and review your options at no cost to you. Is there a day that works better than others?”

3rd Attempt: “We have a flat rate pricing system and that is why it is important for us to be able to get our product specialists out to get the exact measurements, see what is needed for a successful install, and give you the exact price to get the new door installed. Typically, we have options for customers for a basic 2 car garage anywhere from \$1500-\$3000. It just really depends based on exactly what you’re looking for. This price also would include the new door, hardware and all parts. When can I get one of Product Specialists out to your house to review options, measure your opening and provide you exact pricing?”



I'll Call Back/Think About It

Things To Remember:

What the customer is really telling you is they're going to call around! We Don't Blame Them, They're Looking for A Fair Price! If this isn't the case, then they aren't ready or it's not pressing for them to take care of right now. There needs haven't changed so let's get someone out there.

1st Attempt: "I can totally respect you wanting to call back after you have had time to think about it. What I'd like to do is reserve an appointment for you since our schedules book up fast. I'll send you a text message confirming your appointment AND if anything changes then you can give us a call or respond via text message to your appointment confirmation message."

2nd Attempt: "[customer name] We do price match if we are talking apples to apples on the service and the company is licensed, bonded, and insured. The only thing you would have to do is present your WRITTEN estimate to our Service Technician so he can honor it. With that in mind, we'd love to earn your business and reserve an appointment to go out to your house to do an inspection on your garage door. Would that work for you?" [Note To Agent: If they move forward with service's we can provide a free tune up]



Pricing On Openers

1st Response: We carry several different models. All our openers are [Insert Opener Brand], which are superior openers, and all are belt driven. Each model has different features, warranties, and pricing. Pricing depends on a few factors and the height of your garage door. Our trip charge is ONLY \$XX to go out and review the models with you and we will also do a FULL INSPECTION on your garage door at no extra cost. When are you looking at having us out to go over the different options and pricing?

2nd Response: Our openers start as low as \$XXX for parts and our install labor. We run our appointments X days a week, is there a day that works better than another day for our technician to go out and review our openers with you?

3rd Response: [SAVE ATTEMPT IF THEY ARE NOT WANTING TO BOOK]-We do have a \$XXX off opener coupon that I can apply if you move forward with an opener OR for ONLY \$XXX (Labor + Trip Charge) we can install an opener you've purchased yourself.



Wants To Cancel-Service/Door Quote-Options

1st Response: “I can certainly reschedule that for you. When’s a better day and timeframe for you!”

- They can’t wait for our first availability
- Not Sure When They’ll Be Available To Reschedule

another company-DOOR QUOTE

- I’m going with another company/Went with another company-SERVICE
- No Longer Having Issues/Problem Fixed

Things To Remember:

It really is as simple as ‘I can certainly reschedule that for you’



Upset About Getting Rescheduled

“Our customers are our first priority, so I want to apologize for this inconvenience. I’d like to keep you on the schedule and to say THANK YOU for your patience what I can do is provide you at no cost a [insert options], can we go ahead and keep your appointment?”

Things To Remember:

Provide something to the customer!

Spring Job=FREE TUNE UP (Value \$XX)

Opener Install/Issues=Free Surge Protector (Value \$XX)

Tune Up/Minor=X% discount.



Can't Wait For First Availability

“Our customers are our first priority so I want to apologize that the original time slot didn't work out. I'd like to keep you on the schedule and to say THANK YOU for your patience what I can do is provide a FREE Tune Up (\$XX Value) if you move forward with our services. I'll also sent a message over to dispatch to see if there is any availability to move your appointment up. Would that work for you?”

Things To Remember:

Provide something to the customer!

Spring Job=FREE TUNE UP (Value \$XX)

Opener Install/Issues=Free Surge Protector (Value \$XX)

Tune Up/Minor=X% discount.



Not Sure When They'll Be Available To Reschedule

“What I can do [insert customer name] is reschedule it out a week and resend you the appointment confirmation. Simply reply to that text message with what date/timeframe will work best and one of our team members can reschedule based on what works best for you. Does That work?”

Things To Remember:

IF NO: That's not a problem, I'll put your appointment on hold and we can follow up in the [insert days, weeks etc.



No Longer Having Issues / Problem Fixed Itself

“Well, I’m glad that your garage door is no longer having any problems. What I’d like to do is keep you on the appointment AND for ONLY \$XX, we will go out there and do a full inspection on your garage door. Most of our customers are happy with our low-cost inspection fee for piece of mind. Can I keep you on the schedule so we can go out and do a full inspection?”

Things To Remember:

Piece Of Mind Is PRICELESS and our trip charge for a full inspection is ONLY \$25



Going With Another Company-SERVICE

“I’m glad that you’re getting your garage door serviced regardless of who you go with. We would have loved to be the company that earned your business. If I provide a FREE Tune Up (\$XX value) at no cost if you move forward with our services, would this change your mind on staying with us?”

Things To Remember:

(1) If company can get out sooner than us, check with dispatch (2) Other company is cheaper, focus the value on the quality of our workmanship, warranties etc



Going With Another Company- DOOR QUOTE

“Since there’s no cost for us to come out to you, what I’d like to do is keep your appointment on the books AND if you decide to move forward with our services, we can upgrade your spring package to our 10yr, 20,000 cycle springs. Can we keep your appointment, allowing you an opportunity to get another quote on your project?”

Things To Remember:

It’s smart for a homeowner to get a few estimates so they can make the best decision



Parts ONLY

“Are you a contractor?”

- Contractor
- Homeowner

Things To Remember:

This is low hanging fruit for us to book. Some customers are experts with their garage door but MOST ARE NOT! If they are not properly trained on full garage door assessments, then there may be other things going on that also need to be fix. PROBE TO IDENTIFY WHO THE CUSTOMER IS [If customer does NOT want to book appointment after rebuttal attempt you can refer them to; www.garagedoornation.com]



Parts ONLY-Contractor

Things To Remember:

We have a special contractor service! We can set contractors up with Direct Bill (not on their initial job) Some programs even allow special contractor pricing based on frequency/volume.

“We actually have a special program set up for contractors. We work directly with the contractor to service their customer and the contractor pays us directly. At that point you can modify your invoice/work order for your customer. Also, when we set up your business profile, any future needs you would just add your new customers address to your profile and you'll be all set. The only thing your customer/client has to do is let us in so we can do a full inspection and then call YOU for work authorization and payment over the phone (unless you'd like to be there). Is there a certain day/timeframe you're looking for us to schedule to go out?”

Final Response: Refer customer to www.garagedoornation.com to order parts online



Parts ONLY-Homeowner

Things To Remember:

We are a full service garage door company. This means the work we perform comes with warranty on both our labor and parts.

1st Attempt: “We don’t sell parts to the public, we’re a full-service garage door company. What several of our customers do is schedule one of our technicians to go out to your house for ONLY \$XX and they will perform a safety inspection and provide you a write up of all the things you should be aware of. From there you would have a full write up of everything you should be aware of to maintain your garage door. The technician does come with a fully stocked truck so IF you want us to work on anything the technician can jump right in.”

2nd Attempt: We definitely want to earn your business. If you move forward with the work order, I can add a FREE Tune Up (\$XX Value), so you’re already saving money.

Final Response: Refer customer to www.garagedoornation.com to see what parts may be available to order online.



Doesn't Want To Pay \$XX

1st Attempt: [Insert Customer Name], I totally appreciate your hesitation on paying for us to go out to your location and complete a full assessment of your garage door. We do come with an almost fully stocked truck and our trip charge is ONLY \$XX. When your technician arrives, he will look everything over and will review with you what's going on. He won't move forward with any repairs or service unless you choose to move forward with our services AND sign off on the work order. When are you looking for us to go out and look at your garage door?

2nd Attempt: I certainly do not want to lose your business over \$XX. I can waive that mandatory trip charge IF when we go out to your house, you decide to move forward with our services. How does that sound?



Door Install Cancel Request

- Inside 3 Days
- Outside 3 Days

Things To Remember:

This is ONLY used when a customer has placed an order for a new door and they are calling in to cancel their order (regardless of reason). [Pull up door agreement-under job/le, see when agreement was signed or XX% put down]

Key Importance: Inside 3 Days or Outside 3 Days



Door Install Cancel Request- Inside 3 days

Things To Remember:

This is ONLY used when a customer has placed an order for a new door and they are calling in to cancel their order (regardless of reason). [Pull up door agreement-under job/le, see when agreement was signed or XX% put down]

Key Importance: Inside 3 Days or Outside 3 Days

1st Attempt: [Insert Customer Name], we would love to earn your business. If you don't mind me asking, what's the reason for you wanting to cancel your order?

2nd Attempt: We appreciate you reaching out to let us know. I will process your cancellation request and one of our Managers will call you back within 24-48 business hours to make sure all of your questions have been answered and see if there is anything else we can help with

IF STILL WANTING TO CANCEL: Submit New Door Install Cancellation Request

REMINDER: You are ONLY submitting a 'Request', you are NOT cancelling their order. This is completed by a Manager after talking with customer.



Door Install Cancel Request- Outside 3 days

Things To Remember:

This is ONLY used when a customer has placed an order for a new door and they are calling in to cancel their order (regardless of reason). [Pull up door agreement-under job/le, see when agreement was signed or 50% put down]

Key Importance: Inside 3 Days or Outside 3 Days

1st Attempt: Upset About The Turn Around Time: "[insert customers name], "I'm sorry and I know this can be very frustrating for you. It's frustrating for us as well. Suppliers are very backed up and on short supply and high demand during COVID shutdowns/slow downs. All company's and their customers are having the same issues. We will be keeping in contact with you every couple of weeks to keep you informed and once we have possession of your door, we will schedule a day that works best for you"

2nd Attempt: [1st response for all other reasons]: [Insert customer name], the door has already been ordered so we have already paid the supplier the 50% down when submitting the order so the XX% down is nonrefundable, are they sure you want to cancel? I can escalate over to our door department to see if the manufacture has a similar door that we can get sooner. Would you like for me to have them look into this and get back to you?

Final Response: "I can't promise that we can refund you your deposit, however let me get a note over to one of our Managers so they can look into your order and agreement. Please allow 24-48 business hours to hear back from us" **[Submit New Door Install Cancellation Request]**.

