

## D-1.4-01 — Standard Inbound Call Script

---

**Why This Wins Jobs:** A consistent, professional first impression on every inbound call converts more inquiries into booked appointments — before a competitor even picks up the phone.

---

### OVERVIEW & SETUP

**Format:** Laminated script card — inbound call, new customer **Used By:** CSR, office manager, or owner answering phones **Goal:** Collect complete information, build rapport, book the appointment, and plant the first seed of loyalty

---

### THE SCRIPT

---

#### OPENING — Answer within 3 rings

CSR: "Thank you for calling [COMPANY NAME] — this is [YOUR NAME]. How can I help you today?"

*[Let the customer speak. Do not interrupt. Take notes.]*

---

#### STEP 1 — ACKNOWLEDGE & EMPATHIZE

CSR: "I'm really glad you called us. It sounds like you've got [BRIEF RESTATE OF PROBLEM — e.g., 'no hot water' / 'AC not cooling' / 'a leak under the sink']. That's frustrating, and we're going to get that taken care of for you."

**Coaching Note:** Don't skip the empathy line. Customers who feel heard are significantly more likely to stay on the line, book the appointment, and remain loyal. This is one sentence that does heavy lifting.

---

#### STEP 2 — GATHER CUSTOMER INFORMATION

CSR: "Let me pull up your information so we can get you scheduled. Can I get your first and last name?"

*[Wait for response. Enter into booking system.]*

CSR: "And the best phone number to reach you — in case we need to contact you day-of?"

*[Wait for response.]*

CSR: "What's the service address where we'll be coming out?"

*[Wait for response. Confirm city/zip if needed.]*

CSR: "Perfect. And is this your home or a rental property?"

**Coaching Note:** Knowing if it's a rental flags a different decision-maker dynamic. Note it in the job record.

---

### **STEP 3 — QUALIFY THE PROBLEM**

CSR: "Great. I want to make sure we send the right tech with the right parts. Can you tell me a little more about what's going on?"

*[Active listening. Use these follow-up probes as needed:]*

CSR: "When did you first notice the problem?"

CSR: "Is it completely [out / broken / leaking], or is it working partially?"

CSR: "Has this happened before, or is this the first time?"

CSR: "Do you know the make or model of the [UNIT / WATER HEATER / SYSTEM]? Sometimes there's a sticker on the front or side."

**Coaching Note:** You're not diagnosing over the phone — you're gathering enough information so the tech isn't arriving blind. This reduces truck roll time and makes your team look sharp from the first visit.

---

### **STEP 4 — SET EXPECTATIONS ON PRICING**

*[If customer asks for a price — go to D-1.4-02. If not, continue below.]*

CSR: "We work with flat-rate pricing, so once our technician does a quick assessment on-site, you'll have an exact price before any work begins. No surprises."

**Coaching Note:** Say this even if the customer doesn't ask. It preemptively removes price anxiety and signals professionalism.

---

## STEP 5 — OFFER THE APPOINTMENT

CSR: "We have availability [TODAY / TOMORROW / THIS WEEK]. What works better for you — morning or afternoon?"

*[Offer two specific options — never open-ended.]*

CSR: "We can do [TIME WINDOW — e.g., '8 to 11'] or [SECOND WINDOW — e.g., '1 to 4']. Which of those works for your schedule?"

*[If fully booked — go to D-1.4-04.]*

---

## STEP 6 — CONFIRM THE BOOKING

CSR: "Perfect. I've got you down for [DATE] between [TIME WINDOW]. Our tech will call or text about [15–30] minutes before arriving so you're not just waiting around."

CSR: "The address we have is [CONFIRM ADDRESS]. Is that right?"

CSR: "And the best number to reach you is [CONFIRM PHONE]?"

---

## STEP 7 — INTRODUCE THE COMPANY / BUILD CONFIDENCE

CSR: "I just want to let you know — [COMPANY NAME] has been serving [CITY / AREA] for [X YEARS]. Our techs are [licensed / background-checked / uniformed — use what applies]. We'll take good care of you."

**Coaching Note:** Even one sentence of credibility here does measurable work. Customers who receive a brief company introduction before the call ends are more likely to keep the appointment and less likely to comparison-shop in the meantime. Field observation across contractors suggests no-show rates drop noticeably when this step is included — calibrate to your own booking data.

---

## STEP 8 — PLANT THE SERVICE PLAN SEED (OPTIONAL — 15 seconds)

CSR: "One quick thing — when the tech comes out, if everything checks out and you're interested, we do offer an annual service plan that covers priority scheduling and maintenance visits. It's worth asking about. Totally up to you."

**Coaching Note:** Don't over-explain it on this call. The goal is just to put it on the customer's radar so the tech's offer doesn't feel like a cold pitch. Contractors who include this brief mention field-report higher plan conversion rates during the job — calibrate to your own numbers.

---

## STEP 9 — CLOSE THE CALL PROFESSIONALLY

CSR: "You're all set, [CUSTOMER FIRST NAME]. We'll see you [DAY] between [TIME WINDOW]. Is there anything else I can help you with before I let you go?"

*[If yes — address the question. If no:]*

CSR: "Perfect. We'll take good care of you. Have a great [morning / afternoon / evening]."

---

## BRANCHING PATHS

Situation	Go To
Customer immediately asks for a price	D-1.4-02
Customer mentions they were referred	D-1.4-03
No availability for requested time	D-1.4-04
Customer sounds hesitant / price-shopping	D-1.4-09
Customer books — tech needs to close on-site	D-1.4-05

---

## DO / DON'T QUICK REFERENCE

**DO:** - Use the customer's first name at least twice on the call -  
Confirm every piece of information back to them - Offer two time

choices, not an open-ended "when works for you?" - State the flat-rate / upfront pricing policy unprompted

**DON'T:** - Quote a price range over the phone on a new caller - Ask "Is that okay?" after every piece of information - Put a customer on hold more than once without checking back in - End the call without a confirmed date, time window, and callback number

---

## **COACHING NOTE**

This script is the front door of your business. Every word on this card either builds or erodes confidence in your company before a single wrench is turned. Practice it out loud — not in your head. Role-play it with your team monthly. The goal is for it to sound natural, not robotic. When a CSR or owner can run this script without looking at it, the call quality and booking rate both improve. Contractors who formalize their inbound call process typically observe booking conversion improvements in the range of 15–35% versus unscripted calls — calibrate to your own before/after data.

---

**Delegation Note:** A CSR or office manager can execute this script after approximately 2–3 hours of onboarding and role-play practice. Prerequisites: access to your booking/dispatch software, knowledge of your current scheduling availability windows, and a printed copy of the branching script cards (D-1.4-02 through D-1.4-04) within reach during calls.