

The Perfect Service Call

Implementing Residential Service



Step by Step to the Implementing Residential Service The Perfect Service Call in Your Company

Every company is different. Each market is somewhat unique.

However, exceptional service stands out like a sore thumb, in Metropolitan Chicago, or in Rural Moses Lake Washington! The only question is, do you know what your customers consider exceptional customer service?

In our companies, we have taken the approach that we need to define what the perfect service call looks, feels, smells, tastes, and sounds like. Customers judge us on all five of their senses, and even their sixth sense, which is the emotional quotient of how well they actually related to our personnel and our company. Therefore, we need to define the perfect service call, aspire to it each and every time, and most importantly...CONSTANTLY ADAPT IT AND MAKE IT.

There can be a number of questions needing answers to help you get to the end of this process:

1. Who are your customers and what do they expect?
2. What are the capabilities of your staff – Support and outside technicians?
3. Can you define the steps in a perfect service call for your company and market?
4. What training and resources are required to develop the service staff?

There are no shortcuts to success in a service business. You simply must deliver service that is beyond the customers' expectations in order to gain referrals, which have the combined effects of:

1. Driving leads from Service up – Target is 80% of leads from service/maintenance.
2. Driving Leads for Service Agreements higher.
3. Improving your closure rates on each of these areas for service leads, and service agreement leads – Target closure rate on these leads is 80% closure.
4. Potentially lowering your costs of marketing, since the company gets more service department and maintenance leads, it may not need to spend as much to create the leads – Target marketing expense for the company is 3% or less of sales, and a cost per lead of less than \$100. The average has been quoted around \$300 per new lead.

So the we know the service technician is a key, and we know we already ask these technicians to do an incredible amount of work, not the least of which is to fix the equipment, and fix the customer who can be quite unhappy! So what is the perfect service call going to do to help my company?

Simple, the perfect service call is all about setting-up the expectations for the company, the personnel, and then creating processes around getting it done! If you don't define the steps, how do you hold people accountable, train them, resource them, and praise them?

You can't create McDonalds French fries without having the process that replicates the fries consistently each and every time!

What are the steps to a perfect Service Call?

The steps break down into 10 areas of skills and knowledge:

1. Pre-call
2. Arrival
3. The approach to the home.
4. Contact
5. The Interview
6. Understanding Humans
7. The Plan for the customer.
8. Diagnosis and Treatment Options
9. Executing the Repairs
10. Debriefing & Completion

Each key area of the call has steps, which need to be defined, learned, practiced, and then executed in the field!

1. Pre-Call:

1. The call is answered in less than 3 rings at the office – No answering service allowed – a customer WANTS to talk to SOMEONE HUMAN that CAN ANSWER their concerns!
2. The call taker – Is well trained and can answer the callers questions about the service required, such as:
 - a. Basic Checks for the caller to do before a dispatch occurs such as check your fuse, or the breaker being tripped.
 - b. The schedule for service calls availability at that moment.
 - c. A diagnostic fee (or charge to arrive and diagnose)
 - d. How are you planning to pay Ms. Jones, Mastercard, Visa, American Express, or personal Check (no cash is offered although we accept it if this is how the homeowner wants to pay, we do not encourage cash payments).
 - e. Sets a 2-hour window of when we can arrive – 8:00 AM, 11:00 AM or whenever. The window allows people to schedule their time without wasting too much of their day they are already unhappy about the whole idea of time wasting anyway!
 - f. Collects any special information at all, such as a key, which door should we approach, do you have any babies that may be napping when we arrive?
3. 30 minutes prior to the arrival of a technician, a call comes to the homeowner from company dispatcher, stating arrival is imminent. Many customers are cleaning their homes, and love the idea they have a time set now that is in their mind cast in concrete.
4. At this time, the dispatcher confirms to the homeowner, Johnny Fix is the technician that will be coming to your residence.

2. Arrival:

5. Johnny Fix arrives at the home, and parks in the front of the home, not in the driveway, but on the street. We do not want to drop oil on the driveway, nor do we want customer THINKING we are dropping oil on their driveway! If you MUST park in the driveway, the technician MUST carry a piece of plexi-glass or cardboard to slide under the van, at minimum for customer visual purposes.
6. Johnny communicates with dispatch at arrival of home, and gets all relevant customer information for this call. This includes customer data, service history, and any customer equipment if available.
7. Johnny fix must REMOVE ALL STRESS from his life at this time. How you do this is personal, but some ideas are read an inspirational quote for the day, look at a photo of your kids, meditate for 30 seconds and place yourself in a place you call wonderful, or, use music – A “JAMM” session to relieve that stress. Each

day represents a game, and each call a new inning it's time to start the new inning. **A happy, positive approach cannot be faked; you must get prepared mentally for the call!**

8. Johnny puts in his mouth and sucks on, two (not 1) but two breath mints!
9. On any call but the 1st, Johnny takes the baby wipes from his truck, and wipes himself off, cleans his hands, arms, neck, face, and generally makes himself smell and seem just a bit fresher. Determines if he needs some deodorant (NOT COLOGNE).
10. Johnny inspects his **TOTAL APPEARANCE**, and insures he has these things:
 - a. Hair is neat and combed.
 - b. Picture ID on his left pocket – On the uniform.
 - c. Business card, clean, in hand to present to homeowner.
 - d. Surgical shoe covering booties.
 - e. Inspects his cleanliness of uniform – If shirt is not looking good, he chooses a new shirt from one of his replacements he has in his vehicle.
 - f. Flat rate manual, with invoices and clipboard.
 - g. Consumer education materials in his flat rate guide to distribute to homeowner (menu driven if possible).
11. Johnny then completes all the information on the customer invoice header, before he leaves the vehicle. This is done now, so the technician's paperwork is essentially completed when he finishes the write up with the homeowner.
 - a. As he prepares to leave the vehicle, Johnny places the bright Orange/White Safety CONE BEHIND his service vehicle (logo w/company name) – That draws attention to his van, and stands out like a sore thumb.

3. The Approach:

12. Johnny collects his tools, and approaches the home, careful to follow the driveway, or walking path, and not to cut through the yard unless this is the **ONLY POSSIBLE** manner to reach the doorway. Johnny always approaches the front door unless called out by the dispatcher from the special work instructions (Such as a side door, or key). **REMEMBER THIS IS THE FIRST IMPRESSION MOMENT OF TRUTH!**
13. Johnny rings the doorbell (knocks on the door if there is a napping baby or finds key and opens it) and stands no less than 5 feet away from the door, in clear view of the doorway, careful to be sure the photo id name badge is present in view, and waits for the homeowner answers the door.

The homeowner is going to judge three things about you on 1st impression:

- a. Your appearance or social class from your appearance.
 - b. Your intelligence.
 - c. Your character.
14. When the homeowner answers the door, Johnny must **extend his hand for a handshake**. Do this while wearing **a smile!** No matter man or woman, a handshake confirms respect. Be sure to shake the hands all the way to the thumbs – Even with a woman!

4. Contact:

15. After the handshake, hand the homeowner his business card, and says clearly, Hello Ms. Jones, I am Johnny Fix (use your full name not just Johnny – lots of Johnnies, only one Johnny Fix!) Senior Champion Technician from Air Solutions, we are responding to your call regarding your (A/C, Furnace, whatever the call was in regards too). Johnny says, “I understand you have a “Whatever it is” – confirming Johnny understands the customer need.

You should speak clearly, and at a moderate speed. **Eye contact is a MUST here**. We never break eye contact with the homeowner from the point we shake the hand, to the point we are creating initial contact.

Use your name and title on introduction, and the customer’s full name. Miss or Mr. is appropriate. If the customer volunteers to have you use their first name, take it and use it as a good sign. Using a customer name is like gold; it is everyone’s favorite single word to hear!

16. The homeowner will respond (Depending upon what type of equipment we are servicing today); Johnny needs to get permission from the homeowner to ask a few key questions before we get started. We must remember to fix the customer first, then the technical problem.

We need to remember, we act confident we can and will solve the customer’s problem, and take care of them as a company!

Example Introduction: Good afternoon Miss Jones (Extend Handshake to thumbs) my name is Johnny Fix, Sr. Technician from Air Solutions, (hand the business card to Miss Jones). I understand you are having some difficulty with your air conditioner, while I’ve been doing this for longer than I care to say, it always helps if I can ask you a few questions. Can you show me where you change the filter? Tell me about the service history of the equipment?

5. The Interview:

17. The beginning of the customer interview is key because we are getting Miss Jones happily involved, which creates a relationship based on trust. So we need to ask a few key questions to:
- a. Learn about the customer at hand – Personally.

- b. Learn about the equipment and history.
- c. Learn about the problem at hand.
- d. Learn about OTHER AREAS that may present opportunities for solutions AIR SOLUTIONS provides for off of the menu (hot/cold spots, maintenance habits etc.).

At the end of our interview, we need to be able to determine what kind of personality we were dealing with, and how to most effectively work with them. Here are some questions to internalize:

- a. What type of maintenance is done on the system?
- b. Are you pleased with your utility costs?
- c. Does anyone in your home suffer from allergies?
- d. Do you see excessive dust in the home?

Johnny Fix MUST write down the answers to these questions, this is crucial, it shows we care, and it also allows you to refer to later notes about possible solutions.

6. Understanding Humans – Fixing Customers 1st:

18. There are four basic personalities we need to identify which one Miss Jones is in order to make the service call effective:
- a. Amiable
 - b. Driver
 - c. Expressive
 - d. Analytical

See the personality training system for reference on how to use.

The amiable is quiet, wants to please and is one to share their feelings openly.

The Expressive – Happy, talkative, open, and faster paced. Relationship oriented.

The Driver – Fast paced, decisive, control oriented not relationship driven, wants his/her way.

The Analytical – wants information, slower paced, wants facts, slow decision maker.

7. The Plan:

19. Johnny Fix is now ready to solve the very technical problems we were called to do. Inform the customer you need to get your tools and ask them that upon you returning, if they could show you where the equipment is located. Return to the service truck, get the tools, and also get the educational menu brochures you learned about earlier in the call.
20. Upon returning with your tools, explain to the customer you will diagnose the system, and inform them of any issues with the equipment before any repairs are conducted, so they understand the nature of the repair. (Johnny will do this in writing through the invoice).

21. Explain to them you expect to find any issues, and complete them to your 100% Satisfaction because you have a customer satisfaction survey that is required.
22. At this time, Johnny Fix hands the customer the consumer educational materials, and circle highlight the areas of interest that were discussed in the interview. Inform the customer reading these may help them and you will be happy to answer any questions they may have when you are finished with your work on the equipment.
23. Invite the customer to tag along. This is a great trust builder, and allows customers to get to know you, and the company. It establishes credibility that you know what you are doing! Most will pass, but some will be ecstatic and have fun learning from you. More relationships equal more trust equal more satisfied customers equal more sales for the company equal more work and compensation for you!

8. The Diagnosis:

24. Knowing how humans behave can help you hear – it' simple – people believe more with their eyes than their ears. Johnny needs to use the invoice to his advantage here.
25. The customer invoice is completed for the diagnostic and is defined by work required today, work recommended, and finally how to bring the home comfort equipment back to factory peak condition. This invoice is now prepared for presentation and review for the homeowner to approve the work for this day. It is completely filled out as follows:

The price for the repair is listed, and completely added-up in total.
The discount for a **ProActive Service Agreement**[™] Savings Today is completed
The FLAT RATE SYSTEM must be out and in full view for use.
26. Do not oversell the repair. You want to be confident, and review the repair requirement, and ask the customer for their authorization.
27. Use the flat rate manual to flip to the major portion of the repair, and explain the repair, the failure, and the fact that a preventative maintenance agreement, such as **PROACTIVE SERVICE** probably would not only save them money today, but most likely prevented such a repair from being needed.
28. Explain the timetable for this repair, whatever it is. You can fix it now, or if you need a part, when can you fix it. It helps if the customer is sitting down, people respond to bad news better sitting, less of a free fall!

9. Executing The Repairs:

29. Accept the customers authorization of the repair, and determine if they want the PROACTIVE SERVICE AGREEMENT or not, and complete the pricing on the invoice.
30. Complete the technical repairs at this time.

31. Get back with the homeowner and review the repairs of the invoice, and exactly what you did.

At this time they need to sign the invoice to show the repairs were completed to their satisfaction, and Johnny needs to collect payment. Either by personal check or credit card. If by credit card the authorization is run through, and the customer must also sign-off on the credit card receipt as well.

The completed invoice customer copy, the credit card customer copy, and the completed and signed **PROACTIVE SERVICE AGREEMENT** forms (customer copies) are left with the customer.

10. Debriefing And Completion:

32. Johnny tears off the perforated General Managers letter and explains the referral coupons attached. Johnny must explain the customer is valued, and we are always looking for ways to reward our customers for referrals we receive, so here are some valuable coupons. If you put your name on them Miss Jones, when we receive them back, we'll send you a referral check.
33. Johnny also tears off the customer survey card, and lets the customer know it is self-addressed, stamped and Air Solutions always appreciates the return of these surveys to let my boss know how I did!
34. Lastly, Johnny must say, thanks so very much for calling Air Solutions, it means a lot to us that you trust us in your home. You'll be receiving a call from our office; as well to follow-up to be sure everything is fine with your system. Thanks again miss Jones, it's been my pleasure!
35. Johnny returns to his service vehicle, and collects two door hangers already pre-stuffed with the company's weekly coupons, and distributes one to each side neighbor, if the neighbors are within 25-30 yards walking proximity. If neighbors are too far apart, this step is skipped.
36. Johnny returns to his vehicle, radios in the completed paperwork, the amount of the invoice, the method of payment that was collected, the service invoice control code number, the part numbers, and materials if any, and the time in, the time out for the labor control code (Flat Rate only).
37. Johnny has completed the **PERFECT SERVICE CALL**, and is ready for inning number 2!
38. Happy call happens the next day, reference requested for a circle of six mailer with Miss Jones name and coupons, and the date for Miss Jones next PROACTIVE SERVICE Precision Tune-up is scheduled for her convenience.

*Perfect Service requires discipline.
Perfect Service requires accountability.
Perfect Service requires resources, training, and follow-up practice.
Perfect Service Requires processes!
Perfect Service requires resolve to CHANGE – We change all the time!*

Why is this critical to your success?

- Having standards defined makes people more accountable.
- Peak Performance comes from people knowing exactly what is expected of them, and while it may not happen 100% of the time, the fact that the expectation is set, helps them know how and why the standard is helping the company, and them become more successful.
- Creating the perfect service call format is a great teaching tool for your team of service support, and service technicians.
- Having the team define the perfect service call is a great team building exercise.
- Having the service team create and participate also allows them to add new steps, new processes, and request training in the areas they may have gaps.
- **Does perfect service, exceeding the customer's expectations, and making customers so happy they recommend you, help you make more Profit?**