

Service Customer Touchpoints Best Practices



Name:

Date/Time of Call:

Best Practices

Achieved?

Agent Action

TOUCHPOINT: Positive First Impressions

Positive body language and tone of voice?

- Smile heard through the phone
- Spoke loudly enough to be heard and slowly enough to be understood

Yes No

Attitude of gratitude?

- Thanked the customer for calling/holding

Yes No

Identified dealership?

- "ABC Vehicle..."

Yes No

Identified department and self?

- "This is Cory in service..."

Yes No

Offered assistance?

- "What information can I get for you?"

Yes No

TOUCHPOINT: Establishing Trust & Exploring Needs

Complimented customer (if applicable)?

- "Nice car" or "You've taken great care of your car!"

Yes No

Promised to serve?

- "I'd be happy to help with that."

Yes No

Verified/created customer profile?

- Obtained customer's phone number
- Asked for customer's first and last name
- Confirmed all info, including address/email

Yes No

Listened, took notes, showed empathy?

- Actively listened and took notes

Yes No

Explored needs and established rapport by asking the right questions?

- "Tell me more..." "How often?"
- "When does it occur?" "What does it sound like?"
- "Is it happening right now?" "Are you concerned this is a safety issue?"

Yes No

TOUCHPOINT: Providing Transparent Service

Checked for understanding?

- Restated customer's concern: "Let me confirm, this issue started last week..."

Yes No

Provided service features and displayed knowledge?

- Told what is included in the service and answered questions the customer had

Yes No

Reassured customer?

- "This is something we handle all the time, and it may not be as bad as you think!"

Yes No

Explained pricing (if applicable)

- Gave price as special price or everyday price
- Avoided "list price"

Yes No

Provided time estimate?

- Knew peak and non-peak time estimates for requested service

Yes No

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Best Practices



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TOUCHPOINT: Identifying Next Steps

Explained appointment experience?

- Allowed customer to visualize the appointment—painted the picture
- Shared benefits of the appointment

Yes No

Invited to dealership and provided options?

- Used either/or statements to narrow appointment time
- Provided options for handling appointment

Yes No

Determines if drop-off or wait job?

- Ensured understanding of each scenario

Yes No

Provided transportation options?

- Shuttle service, loaner vehicle, public transportation options

Yes No

Provided visual directions?

- Ensured caller knew how to get to dealership
- Provided landmarks/exits as direction markers

Yes No

TOUCHPOINT: Positive Lasting Impressions

Offered to text/email additional info?

- Coupons, Contact information
- Details of the conversation
- Service records
- Appointment confirmation, Warranty information

Yes No

Reiterated appointment details?

- “Your appointment is at 3:15 on Friday!”

Yes No

Recapped conversation?

- Reviewed what was discussed during conversation
- Used notes to ensure complete information

Yes No

Provided contact information and established communication preferences?

- Provided your direct contact information
- Considered offering your cell number and/or providing an electronic business card

Yes No

Thanked customer for calling?

- Thanked customer for calling
- Maintained positive tone

Yes No

Scoring

Count the number of times you answered “Yes”

SCORE 21+: Top Performer!

Congratulations! You are a top performer in using best practices in providing phone service to your customers!

SCORE 13-20: Among the Pack

You are on par with industry averages. Visit CallRevu.com/Training to download our best practices, view coaching videos, and sign up for free live webinar training.

SCORE < 13: Opportunities Abound

You have some work to do to improve your Callers' experiences. Visit CallRevu.com/Training to download our best practices, view coaching videos, and sign up for free live webinar training.