

The Skill Enhancement Training Session

Video #3: CSR Call Tracking Tool

Key Terms Explained:

- **True Call Booking Percentage:** This is the total number of booked calls divided by the total number of opportunities.
 - Remember that existing clients should book at the highest rate.
 - The booking percentage for new clients should be evaluated by lead source to determine the effectiveness of marketing efforts and quality of leads
- **Lead Sources:** Where your clients found your phone number today.
 - You can customize the lead sources in the *Call Tracking Set Up* page of the workbook.
 - Remember to ask, even for existing customers
 - PPC: Pay Per Click Campaigns. (If the homeowner mentions a coupon or special offer associated with a Google, Yahoo, Bing, Social Media, or other online paid campaign.)
 - YP: Phone Book. (You can create different selections based on what phone book is necessary.)
- **Type:** This is the primary reason for the call.
 - Maintenance
 - Repair
 - Replacement

- **Personal Commitment to use the Call Tracking Tool:**

Write a personal commitment to utilize this tool to track call booking percentage:

_____ Date _____



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WHAT IS PRESS PLAY FOR CSRs?

PRESS PLAY for CSRs is a training program designed to help transform your CSRs from call takers to customer service professionals. This principle-based program is designed to be effective in our 2-day classroom program in Austin, as well as in an ongoing coaching and accountability format. The CSRs are taught how to overcome objections, increase satisfaction, and close more calls.

WHO IS THE CSR SERIES FOR?

PRESS PLAY for CSRs is for any CSR, manager, or dispatcher. It is designed to help transform your team into professional CSRs. It provides the knowledge, practice, and skill to increase call closing percentages, and increase client satisfaction.

WHAT DOES THE CSR PROGRAM COVER?

The PRESS PLAY program is a principle-based program covering the following topics:

- Preparing for the Call
- Relationship Building and DISC Profiles
- Evaluation through Questions
- Settling Anxieties
- Scheduling Service and Dispatching
- Planting Seeds
- Logging Accurate Data
- Adding Additional Value
- Your Future: Our Exclusive Season Leveling Program.

ADDITIONAL BENEFITS FROM OUR ONGOING CSR TRAINING?

- Increase Call Closing Percentage
- Decrease Turn Over
- Establish Key Results Areas
- Help with Call Monitoring
- Increase Client Satisfaction
- Develop Accountability Measures

YOUR COACH

Brandy Rogers has been both a CSR and a Dispatcher. She understands the challenges that your team faces. She works with companies all over the United States to improve processes, increase call closing percentages, and increase the CSRs awareness of their role.

TAKE ACTION NOW FOR SPECIAL SAVINGS

Call Brandy today at 512-333-4133

Regular Class Price: \$1,827. **Your Class Price is only: \$1,553.** I am offering a savings of **\$274** if you mention this video series when you book your seat.



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