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POWERFUL OUTBOUND CALL SCRIPTS

**CLOSE MORE DEALS & CREATE
MORE LOYAL CUSTOMERS**



Outbound Call Scripts

Unlock the Fortune in the Follow-Up

This workbook will walk you through the various stages of the customer journey where a LIVE phone call can be effective to:

- **INCREASE BOOKINGS**
- **INCREASE CUSTOMERS COMING BACK FOR REPEAT SERVICES**
- **CREATE A WOW CUSTOMER EXPERIENCE**

It also contains sample scripts you can use to make these calls.

If you'd like help having Jill's Office make these calls automatically on your behalf, reach out to us at hello@jillsoffice.com.

Follow Up Calls Summary:

Effective Stages to Make Outbound Calls to Close More Deals & Create More Loyalty

TIMING When will you call?	BENEFIT/GOAL How will making the call benefit you or the customer?	KEY POINTS What essential information does the call need to cover?	HOOK What 'hooks' or special offers apply?
AFTER AN ESTIMATE	Get customers scheduled for a job	Address customer questions/concerns Scheduling Specials/upsells	Seasonal specials Discounts/bonus offers for scheduling on the call
REMINDER CALL BEFORE JOB	Confirm job, remove any barriers to success, decreased no show / reschedule rate	Confirm job date & details Address customer questions/concerns Set customer expectations Remind customers of pre-job requirements	Important job reminders/prep
AFTER JOB	Verify or create positive outcome from service, upsell, & reschedule Ask for reviews	Thank the customer Confirm satisfaction Resolve concerns Confirm invoice receipt/payment Invite feedback Request a review Schedule next service or callback Close with a thank you!	Membership/recurring service plans
DUE FOR NEXT SERVICE	Get customers scheduled for repeat business	Length of time since last service Customer questions/concerns Scheduling, if possible Identify appropriate follow-up	Benefits of regular maintenance (think dentist!)
NEW SERVICES, SPECIALS	New service/special awareness; Get customers rescheduled	Giving them first dibs on scheduling new service or getting limited time offer of specials	Bundling service deals Seasonal specials Discounts/bonus offers for scheduling on the call
BILLING/PAST DUE ACCOUNTS	Collect payment	Service rendered and date Amount owed Payment options Consequences of nonpayment	Avoid late fees

Powerful Pointers for Effective Outbound Calls

THE GREETING (How to get them to not hang up on you)

BE HAPPY AND FRIENDLY LIKE THEY ARE SUPPOSED TO KNOW WHO IS CALLING THEM.

TELL THEM WHO IS CALLING AND COMPANY NAME

REMIND THEM HOW THEY KNOW YOU: We cleaned your windows last spring or you've reached out before or we fixed your AC etc.

ASK OPEN ENDED QUESTIONS: This or That, avoid yes/no questions as much as possible. Open ended questions spark conversation rather than just a hard no that stops the conversation.

(WHO) "Hi this is _____(your name) with _____ (company),

(HOW THEY KNOW YOU) we cleaned your windows last spring and I am calling to follow up with you.

(OPEN ENDED QUESTION)

How are your windows looking right now?

ADD VALUE: What is in it for the customer? Focus on the benefits rather than the features.

EXAMPLE: It is time to schedule your 21 inspection tune-up so that we can make sure everything is operating as it should, we will clean the coils as well. This is important because this is an expensive part and keeping it clean will make sure it lasts longer and you will have peace of mind going into the cold winter months.

Following up After an Estimate: Sample Script



INTRO:

"Hi, this is Jill from ABC Power Washing. I'm calling to thank you for generating a bid for a house and roof wash using our online system yesterday."

CUSTOMER QUESTIONS/CONCERNS:

"I noticed that we haven't gotten you scheduled for those washes yet. Did you have any questions about the services or package options that I can answer for you today?" **[Answer questions, review package options, and provide details as needed.]**

BONUS: USE THIS OPPORTUNITY TO UPSELL RELATED SERVICES!

"A lot of customers who get their windows cleaned love to add on our gutter cleaning service to make sure their gutters are in good shape to prevent any water damage and protect their roof. Did you want to add that to your service, as well?"

SCHEDULING:

"Great! I'm so glad we could figure out which option is best for your needs. I can get you scheduled for that premium package right now if you'd like. I've got an opening [date and time]. Does that work for you?"

SPECIALS/UPSELLS: (OPTIONAL)

"We're currently offering a 10% discount on patio washes for anyone who books a house wash to take place before June 1st. Is that something you'd like to add to your service on [date]?"

CLOSING:

"Perfect! You are scheduled for [day, date, and time] with [tech's name]. You'll get a confirmation email momentarily and [tech's name] will reach out via text when they're on their way. Is there anything else I can help you with today?"

OR

"Of course, I'm so sorry you have to wait for that painting to be done/other constraint before you can schedule. Would 2 weeks be a good time for me to call back and follow up?"

Make It Your Own

Intro:

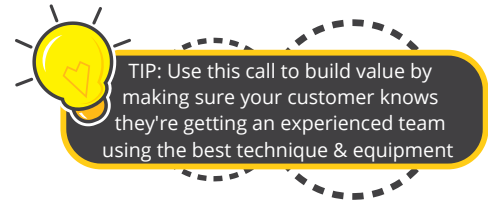
Customer questions/concerns:

Scheduling:

Specials/Upsells (optional):

Closing:

Reminder Call Before Job: Sample Script



INTRO AND CONFIRM:

"Hi, this is Jill from JKL Carpet Cleaning. I'm calling to thank you for scheduling a carpet cleaning this [date and time]."

SET EXPECTATIONS:

"Since we are two days out from your appointment, I wanted to call with a quick reminder that while our techs can move light furniture out of the way before they clean the carpets, if you have any larger or heavier pieces that you'd like us to clean under, they'll need to be moved out of the way before the team arrives. Perfect. It looks like your tech will be [name]. He's very experienced and you'll be in great hands."

CUSTOMER QUESTIONS/CONCERNS:

"To save time on [day], are there any questions I can answer for you now?"

CLOSING:

"Okay, Mary, it sounds like everything is in order, so we'll see you [date and time]! If anything changes between now and then, please give us a call so we can adjust your appointment accordingly. Have a great day!"

Make It Your Own

Intro:

Confirm:

Address customer questions/concerns

Set expectations:

Offer key reminders:

Closing:

After Job: Sample Script

INTRO AND THANKS:

"Hi, this is Jill from MNO House Cleaning. I'm calling to thank you for having [tech] come out and clean your home on Saturday."

CONFIRM SATISFACTION:

"Quality is important to us. Was everything cleaned to your satisfaction?"

RESOLVE CONCERNS:

"Oh, I'm so sorry that we missed the ceiling fans! I appreciate you letting me know, and I want to make that right. I'd love to add a complimentary baseboard cleaning to your next appointment with our apologies."

OR if none:

"Oh, wonderful. I'm so glad to hear that. I'll be sure to tell the team how happy they were with your work."

INVITE FEEDBACK/REQUEST A REVIEW:

"Is there anything else we can do differently to serve you better next time?"

(If they were happy) *"We get most of our business off referrals. Would you mind taking just one minute after this call to leave us a review?"*

SCHEDULE NEXT SERVICE OR CALLBACK:

"It looks like we've got your next service appointment set up for two weeks from now on [day, date, and time]. Does that still work for you?"

CLOSING:

"Excellent. I appreciate you taking the time to speak to me, Janelle. If you think of anything else we can do to assist you just give us a call at any time. Thanks and have a great evening!"

Make It Your Own

Intro and thanks:

Confirm satisfaction and/or resolve concerns:

Confirm receipt of invoice or thank you for payment:

Invite feedback/Request Review:

Schedule next service or follow up call:

Closing:

Rescheduling/Seasonal Calls/ New Services & Specials: Sample Script



TIP: Use words like "priority" and "limited time" to create a sense of urgency and make customers feel like they're favored treatment!

INTRO AND REASON FOR CALL:

"Hi, this is Jill from PQR Lawn Services and Illumination. I'm calling because the holiday lights season officially starts in 2 weeks! We're running a special this year where we are offering all of our returning customers a 5% discount and priority scheduling."

CALL TO ACTION:

*"Did you plan to do the same lighting you had last year, or were you interested in changing or expanding your display this holiday?" **[Renew or re-generate bid, per your standard process.]***

SCHEDULING:

*"Great, so it looks like the deluxe plan that you went with last year plus those two additional trees come to \$860. My first available priority scheduling appointments are **[date and time]** and **[date and time]**. Which of those works best for you?"*

CLOSING:

"Okay, Mark, you are all set! You'll get your confirmation email shortly and [tech] and his team will be out [day, date, and time] to install those lights for you. We look forward to seeing you then!"

Make It Your Own

Intro:

Reason for call:

Call to action:

Scheduling:

Closing:

Billing & Past Due Accounts: Sample Script

INTRO:

"Hi, this is Jill from VWX Cleaning Services. Am I speaking to Margaret?"

SERVICE RENDERED AND DATE:

"My records show that our team was out on Wednesday, October 10th to do a one-time cleaning of your property at 523 Wallflower Street."

AMOUNT OWED:

"The total for that service came to \$329 and it doesn't look like we've received that yet."

PAYMENT OPTIONS:

"I wanted to make sure that you hadn't had any trouble with the online payment portal. I'd also be happy to go ahead and get that payment taken care of over the phone for you instead if that's easier."

If you can take and process payment, clarify how you will confirm payment for their records. "Thank you so much for that, Margaret. I'll go ahead and send a receipt for you now. Is the [address] still the best email for that?"

CONSEQUENCES OF NONPAYMENT:

"Of course, I totally understand that you need to wait until you get home to get that paid. Please be aware that a late fee will automatically apply if the total isn't paid by 90 days from the date of service, which is next Monday the 7th, so if you run into any issues at all, please give us a call back right away so we can help you get this resolved before that kicks in."

CLOSING:

"I appreciate you taking time to talk to me today and I hope you have a wonderful afternoon!"

Make It Your Own

Intro:

Service rendered and date:

Amount owed:

Payment options:

Consequences of nonpayment:

Closing:

Custom Calls: Make It Your Own

Often, businesses find it helpful or impactful to make calls at other times or for other specific purposes over the course of their relationship with a customer. Scripts can be helpful for these calls, too. You can use the same format and general script points to develop custom scripts for your business. Use this guide and the blank spaces in the chart at the front of this workbook to help you.

Timing or Purpose of Call: _____

Point of Contact/Person Making the Call: _____

Key points to hit or pieces of information to confirm or discuss during the call: _____

Custom Calls: Make It Your Own

Intro:
Point 1:
Point 2:
Point 3:
Point 4:
Closing:

Jill's Office Can Help Answer and Make Your Calls Automatically



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