

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 FixthePhones.com 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 FixthePhones.com to download our best practices, view coaching videos, and sign up for free live webinar training.