ServiceReach

THE HOME SERVICE SALES PLAYBOOK

Train Better CSRs. Handle Tough Objections. Book More Jobs.

FIELD EDITION | SALES OPERATIONS + CUSTOMER SERVICE

- 30-day training rollout and certification
- Inbound, outbound, and commercial call scripts
- Deep objection-response playbooks and industry battle cards
- Printable QA scorecards, coaching sheets, and KPI tracking

FIND • CONTACT • MANAGE • GROW

Customizable training manual for home service business owners, CSR managers, and inside sales teams.

START HERE

How to use this playbook

A manager-run training system, not a script employees memorize once.

The outcomes this manual is built to create

THE CUSTOMER EXPERIENCE	THE BUSINESS RESULT
Fast, respectful response; clear service expectations	Higher qualified booking and appointment attendance
Useful discovery, not robotic pitches	More accurate estimates, better technician handoffs
Transparent pricing, fees and follow-up	Fewer complaints, cancellations and surprises
Documented dispositions and permission	Reliable reporting and compliant outreach

Find your starting point

MODULE	USE IT WHEN
01 / Manager launch plan	You are starting a CSR training program or rebuilding one
02 / Call skills and scripts	You need ready-to-read talk tracks for inbound/outbound/B2B
03 / Objections and battle cards	You need frontline answers and service-specific selling prompts
04 / Quality and coaching	You need call scorecards, role-plays, certification and accountability
05 / Tracking and improvement	You need standard dispositions, funnel math and weekly review

NON-NEGOTIABLE

The CSR sells a truthful, appropriate next step - an appointment, estimate, service visit, or commercial introduction. CSRs do not diagnose safety hazards, fabricate urgency, invent consent, or pressure customers after a clear refusal.

The core performance equation

Eligible contacts → meaningful conversations → qualified opportunities → appointments booked → appointments completed → estimates → sold jobs → revenue and gross profit.

Coach behaviors every day. Review funnel results by source, service type and rep every week. Change one process variable at a time.

01 / MANAGER LAUNCH

Set up training before the first CSR logs in

Training fails when people are taught a script but have no clear offers, availability, or rules.

Owner / manager checklist - prepare 48 hours ahead

READY?	REQUIRED INPUT	OWNER
☐	Service menu: what you do / do not service; service area ZIPs	Operations
☐	Approved service offers, pricing ranges and diagnostic/visit fees	Owner / pricing
☐	Live calendar/dispatch rules: capacities, time windows, on-call routing	Dispatch
☐	Lead sources, eligibility checks, DNC suppression and contact policies	Compliance owner
☐	FAQ: memberships, warranties, financing and discounts (verified terms only)	Sales manager
☐	Approved talk tracks and escalation paths for hazards/complaints	CSR lead
☐	CRM fields and standardized call dispositions	Admin
☐	Call-review workflow and recording permission review	Manager / legal
☐	Weekly KPI dashboard and coaching schedule	Manager
☐	Ten sample good/poor calls, anonymized and approved for training	Trainer

Training room / system setup

- Create a sandbox or non-production environment for booking drills; never create fake production jobs.
- Give trainees a phone/desk setup, a printed battle card, an emergency escalation tree and a booking cheat sheet.
- Choose two coaches: one leads role-play, one scores independently; compare scores in calibration.
- Set 30-minute recurring huddles and twice-weekly 1:1 coaching during onboarding.

MANAGER KICKOFF MESSAGE

“Your job is not to win an argument. Your job is to understand the customer, recommend an honest next step, book correctly when appropriate, and leave perfect notes for the team.”

01 / MANAGER LAUNCH

Week 1 - five-day classroom-to-floor launch

Each day ends with a demonstration. Passing a quiz alone does not authorize live calling.

DAY	TEACH / SHOW	PRACTICE	EXIT GATE
1 / Foundations	Products, ZIPs, fees, call types, contact permission, DNC, emergency rules	Knowledge quiz, 10 contact-eligibility decisions, DNC role-play	90% quiz + zero missed critical safety/compliance actions
2 / Voice	CLEAR method, tone, opening, discovery questions, silence, listening	10 openings, 3 full residential role-plays, note-taking drill	QA ≥80 on two practice calls; all disclosures accurate
3 / Outbound+B2B	Lead source truth, decision maker, gatekeeper, qualification, next step	2 B2B role-plays + 2 outbound homeowner role-plays	Correct eligibility and commercial vendor qualification
4 / Inbound	Service triage, pricing/fees, availability, appointment confirmation, escalation	3 booking role-plays incl. hazard, price shopper, schedule change	Zero unsafe triage actions; zero undisclosed fees
5 / Certification	Objection handling, real CRM entries, live call shadowing, manager review	Written quiz, simulated call, 2 observed supervised calls if eligible	QA ≥85/100, no critical fail, manager sign-off

Daily training cadence (sample 6-hour shift)

BLOCK	PURPOSE
20 min	Huddle: one skill + one model call
45 min	Teach: product, policy, or call method
60 min	Role-play cycles: CSR / prospect / observer
45 min	CRM/booking sandbox reps
90 min	Shadowing or controlled live calls, if authorized
40 min	Score recordings and self-review
20 min	Coach: commit to one change for tomorrow

RELEASE RULE

A good role-play score does not override a failed DNC, safety, pricing disclosure, or truthful-identity check. Correct the failure and retest before live independent calling.

01 / MANAGER LAUNCH

Weeks 2-4 - release, reinforce, certify

Use increasing call complexity, not just increasing call volume.

PERIOD	REPS / WORK	MANAGER CHECK	PASS STANDARD
Week 2	Supervised inbound and pre-approved outbound; 1 campaign; 2 battle cards	Score 5 calls / CSR; review 100% of first DNC/escalation incidents	Two consecutive QA ≥85; CRM completion ≥95%
Week 3	Two service lines, price objections, light commercial qualification	2 role-plays + 5 QA reviews; verify appointment quality	No critical fail; show rate and qualified bookings reviewed
Week 4	Full allowed call mix; independent follow-up and documentation	Manager reviews recordings, missed opportunities, funnel	QA ≥85 average; manager authorizes independent status

Certification ladder

LEVEL	MAY DO	REQUIRED EVIDENCE
Trainee	Sandbox practice, shadowing	Quiz + scripted drills
Provisional	Supervised approved calls; limited booking privileges	Day 5 85/100, zero critical fails
Certified	Independent eligible inbound / outbound scope	Two strong weeks of QA and complete CRM records
Senior	Mentor, handle complex recovery / vendor calls	Sustained QA, customer outcome and manager approval

Manager coaching rhythm

- Daily (10 minutes): review yesterday's objections, mistakes, and one win.
- Twice weekly (15 minutes per rep): listen to a call, agree on one behavior, practice it twice.
- Weekly (30 minutes): compare funnel rates by channel and lead source, not simply calls placed.
- Monthly (60 minutes): calibrate QA scoring, update battle cards, evaluate whether scripted offers are effective.

NEVER BUILD A QUOTA THAT REWARDS RULE-BREAKING

Set activity goals only after legal eligibility, lead quality, and realistic call capacity are established. If complaints or DNC problems rise, stop and fix the process before scaling volume.

02 / CALL SKILLS

The CLEAR method - more than an opener

Use the same five-stage conversation framework for inbound, outbound, and commercial calls.

STAGE	BEHAVIOR TO TRAIN	MANAGER EVIDENCE
C / CHECK	Know the contact/source rules before outbound calls; for inbound, identify the request and any immediate safety issue.	Eligibility reviewed or correct urgency triage.
L / LEAD	Identify yourself and company. State the honest purpose. Set expectations about the call.	No deceptive opener, clear pace and warm voice.
E / EXPLORE	Ask one question at a time. Reflect back the problem. Listen for needs, timing and constraints.	Customer speaks; CSR paraphrases accurately.
A / ASK	Recommend one relevant next step with a confirmed timeframe, fee, and realistic outcome.	Explicit choice, no unsupported promise.
R / RECORD	Select correct outcome and add notes that another teammate can act on without guessing.	Status, source, service, address, permission, next action logged.

Talk/listen coaching rules

- Ask one question; wait for the full answer. Do not stack three questions in one breath.
- Use their own words in your recap: “So the unit is running, but it is not cooling the back rooms. Correct?”
- When the person sounds upset, acknowledge the disruption before discussing the calendar.
- Use factual urgency: “We can check available appointments”; never “your system may fail tomorrow” without evidence.
- Offer an opt-out without argument. “No” means the call may be over, not the start of a rebuttal contest.

COACH TIP

Track whether the CSR got the customer to talk, not whether the CSR completed every sentence in the script. The script is a guide; a correct diagnosis is not the CSR’s job.

02 / CALL SKILLS

Inbound CSR call - complete booking framework

Train the sequence until the rep can adapt naturally without missing key information.

Opening + discovery

SAY THIS

"Thank you for calling [Company], this is [CSR]. How can I help you today? [Listen fully.] I can help coordinate the next step. Can I ask a couple of quick questions to make sure we send the right person?"

1. Confirm service need: What are you seeing or hearing? When did this start?
2. Check safety/urgency: Is there an active leak, gas smell, fire, exposed wire or another immediate danger? Follow the documented emergency policy.
3. Verify service area, address, contact number, access needs and property type.
4. Explain the relevant visit type, any confirmed fee, and what a technician can/cannot determine onsite.
5. Offer real appointment options from dispatch - never invent a time slot.
6. Confirm: day, arrival window, address, service type, fee, arrival procedure, reminders and who is home.
7. Record exact customer wording and escalate special situations; ask if anything else is needed.

Service / diagnostic fee script

"For [service type], our [verified] visit fee is [$amount]. The technician will [actual scope]. Any additional work would be discussed separately before approval. Would you like me to check the next available opening?"

If a customer insists on a firm price

"For [standardized service], the published rate is [$amount], which includes [exact scope]. For [unverified repair], I do not want to guess before the technician sees it. I can explain our assessment fee and appointment options."

FINAL READ-BACK

"You are booked for [day] in the [arrival window] at [address] for [service]. The [fee] is [amount/none]. We will contact you by [approved channel]. Did I get everything right?"

02 / CALL SKILLS

Outbound homeowner scripts - four legitimate contexts

Only use the script for the contact category you can substantiate.

A. Eligible cold outreach

SAY THIS

"Hello, may I speak with [Name]? I'm [CSR] with [Company]. This is a sales call about [service]. Is now okay for a brief question? We serve [area] and offer [real offer]. Is that something you are considering, or not at this time?"

If positive: "What project or maintenance need did you have in mind?" Then qualify and request an estimate/visit. If negative, thank them and close; do not recycle the same pitch.

B. Verified prior inquiry

SAY THIS

"Hi [Name], I'm [CSR] with [Company]. I'm following up on the [service] inquiry you made to us on [verified date]. Are you still interested in getting help, or should we close the request?"

Use only if the prior inquiry, recipient, seller and any relevant permission actually match. Purchased aged lead ≠ automatic permission.

C. Existing customer - maintenance opportunity

SAY THIS

"Hi [Name], I'm [CSR] with [Company]. We serviced your [equipment/service] in [month/year]. I wanted to ask if you'd like an appointment for [genuinely relevant seasonal service]. No problem if not."

D. Requested callback

SAY THIS

"Hi [Name], this is [CSR] at [Company]. We spoke [day] and you asked me to call about [topic] now. Is this still a convenient time?"

Micro-close options

- "Would you like the estimate, or is the project not a priority?"
- "Is a quick service visit useful, or would you prefer we close this out?"
- "If you want to explore it, I can check actual openings and disclose the fee before we book."

HARD STOP

If the prospect says "not interested," requests no further contact, or explicitly declines, conclude politely. If they request removal, suppress their number immediately across campaigns for the relevant seller.

02 / CALL SKILLS

Commercial calling and gatekeeper navigation

Lead with vendor reliability and service fit, not a generic discount.

Gatekeeper / business receptionist

SAY THIS

"Hi, this is [CSR] at [Company]. We provide [trade] service to [business type] in [area]. Who manages maintenance vendors or approves backup service providers at your location? This is a new business inquiry, not an existing job."

Property management decision maker

SAY THIS

"We support property teams with [service] across [coverage area]. Are you currently adding vendors for overflow, scheduled work or emergencies? I can share our actual coverage, insurance and response process if a brief introduction would be useful."

Restaurant / hotel operator

SAY THIS

"We handle [commercial service] for businesses in [area]. Who coordinates maintenance contracts at your location? I wanted to see whether a secondary provider or preventative service proposal would be relevant."

Four commercial qualification questions

8. "How many locations or units do you manage in this area?"
9. "Who approves vendor relationships, and is there an application or insurance process?"
10. "What type of work is most common - planned, reactive, or emergency?"
11. "If you are open to comparing vendors, what is the preferred next step?"

Vendor meeting close

"Would a ten-minute call to review coverage and qualifications be useful? I can suggest two real times, or follow your formal onboarding process."

B2B CRM handoff fields

Business name, SIC/segment, locations or units (verified), contact role, contract status, existing vendor, service scope, vendor requirements, decision process, agreed next step, contact preference and date.

COMMERCIAL REALITY

A strong result is sometimes a completed vendor application or introduction to the facilities manager, not an immediate appointment. Count these separately from homeowner service bookings.

02 / CALL SKILLS

Service-line talk tracks - speak the customer's language

Use service-appropriate discovery; never claim a problem exists because someone appears on a list.

MARKET	OPEN DISCOVERY QUESTION	TRUTHFUL NEXT STEP
HVAC	"Are you looking at routine maintenance, a comfort issue, or a replacement?"	Tune-up appointment or system evaluation
Plumbing	"Is this an active issue, or something you are planning to update?"	Repair visit or water-heater estimate
Roofing	"Are you considering an inspection, maintenance, or a replacement?"	Qualified roof assessment
Electrical	"Is this about an existing issue, an upgrade, or new equipment?"	Licensed electrician visit / project consult
Pool service	"Do you need regular cleaning or help with equipment?"	Service quote or equipment visit
Pest control	"Is there a pest concern today, or are you exploring prevention?"	Inspection / preventive plan overview
Landscaping	"Do you need recurring care or a one-time landscape project?"	Maintenance quote / design consult
Cleaning	"Is this a one-time clean, move-related work or ongoing service?"	Scope-based quote and visit
Painting	"Which surfaces and areas are you looking to refresh?"	Painting estimate
Remodeling	"What are you thinking of changing and on what timeline?"	Project consultation / scope review
Property managers	"Who handles vendor approvals and maintenance requests?"	Vendor introduction / application
Restaurants	"Who oversees service coverage for the location?"	Commercial service review

Reminder: "free" is only appropriate if the actual visit or quote is free. Do not describe a diagnostic visit as free if any fee may apply.

02 / CALL SKILLS

Qualification and CRM dispositions

A clean pipeline begins with consistent definitions, not more activity.

The SERVICE qualification checklist

PROMPT	WHAT THE REP MUST CONFIRM
S - Service need	Trade and problem in the customer's own words; no diagnosis guesses
E - Exact location	Service address and whether inside coverage area
R - Risk / urgency	Immediate hazard? Urgent, soon, or future? Follow escalation policy
V - Visit type	Service call, maintenance, estimate, quote, project consult, or B2B intro
I - Information	Verified pricing/fees, access conditions and who must be present
C - Confirmation	Real date/window, phone and approved reminder method
E - Enter CRM	Source, qualification, outcome, notes, assigned owner, next action

Mandatory dispositions - use one primary outcome

STATUS	DEFINITION / NEXT STEP
No answer / voicemail	No live interaction. Record attempt only; follow approved frequency rules.
Wrong number / invalid	Do not treat as qualified. Verify/delete/correct; do not keep retrying blindly.
Connected - unqualified	Contact reached but outside service scope/area/decision criteria.
Not interested / not now	No booked next step. "Not now" needs a specifically requested follow-up to schedule one.
Qualified - no appointment	Real opportunity, but no commitment. Capture reason and next step.
Appointment booked	Specific confirmed time, scope and address. No duplicate bookings.
Commercial vendor step	Approved introduction, application or credential submission.
Do not call / opt-out	Immediate block; no further marketing calls for seller.
Complaint / safety escalation	Route to named owner and acknowledge the handoff.

SYSTEM CONFIGURATION

Map these fields to ServiceReach's available CRM and scheduling fields. If a field is not natively available, use a consistent note/tag or your administrator's configured custom field instead of assuming every field exists out of the box.

03 / OBJECTION SKILLS

The 4-step objection method

Handling a concern means helping the prospect decide, not defeating their objection.

1. Acknowledge

Respond to the actual concern without “but” or an argument.

Example: “I understand why that would matter.”

2. Clarify once

Only if the prospect has not clearly declined. Ask a brief, useful question.

Example: “Is your main concern the visit fee or the final repair cost?”

3. Answer with evidence

Give a true policy, option or explanation. Never invent savings or availability.

Example: “The assessment is [$X] and repairs would require your approval.”

4. Ask or exit

Offer one logical next step. Respect “no,” and log the outcome.

Example: “Would you like a quote, or would you rather leave it here?”

Stop / continue decision rules

IF THE PROSPECT SAYS...	CSR ACTION
“Remove me,” “stop calling,” “don’t contact me”	Stop immediately, confirm removal, suppress record.
“Not interested,” “no thanks”	Acknowledge, end without another pitch.
“That fee is too much - what does it cover?”	Clarify and explain confirmed scope; one appropriate option.
“I am considering other contractors”	Explain differentiators you can verify; offer quote only if invited.
“Can you call next Thursday?”	Confirm specific requested time and allowed contact channel.

PRACTICE STANDARD

In role-play, every CSR must identify whether a statement is a hard stop, information request, negotiable constraint, or service complaint. Misclassifying a hard stop is a critical failure.

03 / OBJECTION SKILLS

Residential objection library - price and value

Train the response, the question to ask (when appropriate), and what to record.

“Your price is too high.”

Listen for: Unclear scope, high total cost, or a competitor quote.

CSR: “I understand. Is the difference in the visit fee, the scope of work, or the full quoted price? I can explain what our approved estimate covers.”

Next step / CRM: Clarify scope; do not discount without authority. | Tag: Price concern

“The other company is cheaper.”

Listen for: May not be comparing the same scope or warranty.

CSR: “That may be a good option. If you want to compare accurately, I can walk through what our quote includes: [verified scope, warranty, fees].”

Next step / CRM: Offer a factual comparison, not competitor criticism. | Tag: Competitor comparison

“Can you give me the price right now?”

Listen for: Wants certainty before committing.

CSR: “For [standard service], our verified rate is [amount]. For work that needs diagnosis, I don’t want to guess. The visit fee is [amount], and you decide about repairs after the findings.”

Next step / CRM: If willing, set estimate visit; otherwise exit. | Tag: Upfront pricing

“Do you have a free estimate?”

Listen for: Concern about risk of a visit charge.

CSR: “For [service], our policy is [accurate policy]. Any diagnostic or trip fee is [amount]. I want to be clear before we schedule.”

Next step / CRM: Book only after fee acknowledgement. | Tag: Fee policy

“I need financing or payments.”

Listen for: Affordability/cash timing.

CSR: “We have [verified financing option] if eligible, with terms provided by [provider]. I can explain the application process, or we can discuss the estimate first.”

Next step / CRM: Do not imply approval or quote unavailable terms. | Tag: Financing

03 / OBJECTION SKILLS

Residential objection library - trust and timing

Customer trust is won through accurate answers and follow-through.

“I do not know your company.”

Listen for: They need credibility.

CSR: “That is fair. We are [truthful service-area/company description]. You can verify us at [real website] and review our credentials. I can share details without asking you to commit.”

Next step / CRM: Offer a verifiable website, licensing or insurance if applicable. | Tag: Trust / credibility

“How did you get my number?”

Listen for: Privacy or annoyance.

CSR: “We obtained contact information from [truthful source description]. I am calling for [company] about [service]. If you prefer no further calls, I can mark that now.”

Next step / CRM: Answer plainly; record suppression on request. | Tag: Source / privacy

“I am busy.”

Listen for: Bad timing.

CSR: “Understood. I will let you go. If you would like a callback, what specific day and time works?”

Next step / CRM: No agreed time means no invented appointment. | Tag: Busy

“Send me something.”

Listen for: May be genuine interest or a polite exit.

CSR: “Of course. What would be most helpful - service options, credentials, or pricing? Which permitted channel would you like us to use?”

Next step / CRM: Record channel permission and document sent; no endless sequence. | Tag: Send information

“I need to talk to my spouse or partner.”

Listen for: Shared decision authority.

CSR: “Absolutely. Would it help to have a written scope and price to review together? We can set a time when everyone who needs to decide is available.”

Next step / CRM: Confirm decision process; do not pressure. | Tag: Decision process

03 / OBJECTION SKILLS

Residential objection library - existing providers and fit

These are cases where a respectful exit may be the best result.

“We already have someone.”

Listen for: An existing trusted provider.

CSR: “Glad you have that covered. If you ever need a backup provider, we can share our qualifications. Would that be useful?”

Next step / CRM: If not, thank them and finish. | Tag: Existing vendor

“Nothing is wrong right now.”

Listen for: No current need.

CSR: “Good to hear. I am not assuming there is a problem. We also provide [real maintenance service] if you ever need it.”

Next step / CRM: Only offer future maintenance if prospect is open. | Tag: No current need

“I rent; I cannot authorize this.”

Listen for: Ownership/approval gap.

CSR: “Thanks for clarifying. Is this something your landlord or property manager coordinates? You should use their established process rather than booking unauthorized work.”

Next step / CRM: Do not ask for unrelated landlord private data. | Tag: Tenant / no authority

“I want a warranty guarantee.”

Listen for: Fear of poor workmanship or repeat failure.

CSR: “I can explain our actual written warranty for [service]. The coverage is [verified terms], and exclusions are in [document].”

Next step / CRM: Do not invent terms or promise lifetime coverage. | Tag: Warranty

“I had a bad experience with your company.”

Listen for: Service recovery takes priority over upsell.

CSR: “I am sorry to hear that. Could I take the details and connect you to the manager responsible for resolving it?”

Next step / CRM: Create complaint ticket; manager owns follow-up. | Tag: Service complaint

“Not interested. / No thanks.”

Listen for: Clear refusal.

CSR: “Understood. Thank you for your time.”

Next step / CRM: Stop pitching. If they also request no future calls, update DNC immediately. | Tag: Declined

03 / OBJECTION SKILLS

Commercial objection library - vendor and budget concerns

B2B selling usually advances through an approval process rather than an immediate job.

“We have an approved vendor list.”

Listen for: Formal onboarding process.

CSR: “Understood. Is there an application for future consideration or overflow coverage? We can submit our verified credentials if helpful.”

Next step / CRM: Log owner, requirements and due date. | Tag: Vendor onboarding

“We already have a maintenance contractor.”

Listen for: Primary vendor relationship.

CSR: “That makes sense. Do you ever maintain an approved secondary provider for after-hours or overflow needs?”

Next step / CRM: If no, end. Do not undermine incumbent. | Tag: Incumbent vendor

“We have no budget this quarter.”

Listen for: Timing, spending freeze or unknown cost.

CSR: “Understood. Are you discussing future maintenance coverage, or are all vendor evaluations paused until a particular period?”

Next step / CRM: Schedule only an explicitly agreed future review. | Tag: Budget cycle

“Send insurance and references.”

Listen for: Formal qualification.

CSR: “Certainly. We can send our current certificate of insurance, service area and references that we are authorized to share. Who should receive them and what is your onboarding process?”

Next step / CRM: Verify documents before promising; ask preferred channel. | Tag: Vendor credentials

“Our facilities team handles everything in-house.”

Listen for: Low need for routine vendor.

CSR: “Understood. Do you use outside specialists for licensed trades, emergencies or capacity overflow?”

Next step / CRM: If no need, close. | Tag: In-house maintenance

“How many locations can you cover?”

Listen for: Needs proof of capacity.

CSR: “We currently serve [verified ZIPs/locations] and can discuss actual response windows by site. I would rather confirm coverage than overpromise.”

Next step / CRM: Map coverage and handoff. | Tag: Multi-site scope

03 / OBJECTION SKILLS

High-stakes scenarios - recovery, delays and safety

These calls are evaluated on honesty, empathy and correct routing.

"You missed your appointment!"

Listen for: Breach of trust and possible customer cost.

CSR: "I apologize that the visit did not happen as expected. Let me confirm the job details and connect with dispatch so I can give you a verified update."

Next step / CRM: Escalate; never invent ETA or blame customer. | Tag: Missed appointment

"Your technician made the problem worse."

Listen for: Potential safety, quality or liability issue.

CSR: "I am sorry you are dealing with that. I want to document exactly what happened and get a manager or service lead involved promptly. Is there any immediate safety concern?"

Next step / CRM: Use written safety escalation; no fault admission outside policy. | Tag: Quality complaint

"I want a refund."

Listen for: Billing dispute.

CSR: "I can help document the charge and connect you with the person who handles billing resolutions. May I confirm the invoice and what happened?"

Next step / CRM: Open case with response owner and expectation. | Tag: Refund request

"I smell gas / there is sparking / water is rising."

Listen for: Immediate safety hazard.

CSR: "Your safety comes first. Please follow emergency safety guidance from the appropriate authority. I am escalating this according to our emergency protocol."

Next step / CRM: Do not coach DIY fixes; advise contacting emergency services/provider as policy requires. | Tag: Safety emergency

"Are you recording this call?"

Listen for: Privacy / disclosure request.

CSR: "Our recording policy is [verified policy]. I can connect you with a supervisor or follow the approved process if you prefer not to be recorded."

Next step / CRM: Follow applicable consent/recording laws. | Tag: Recording inquiry

"Take me off your list."

Listen for: Explicit opt-out.

CSR: "Absolutely. I am marking this number not to receive further marketing calls from [company]."

Next step / CRM: End pitch; suppress right away; verify record. | Tag: DNC - critical

04 / BATTLE CARDS

How to use industry battle cards

Keep a one-page card beside each CSR, updated with actual offers, capacity and policies.

Battle card anatomy

FIELD	WHAT TO WRITE	EXAMPLE
Buyer trigger	Observable prospect-stated need, not assumed damage	“Home is not cooling evenly”
Who to target	Appropriate consumer or business filter	Owner + Single Family + ZIP
Opening question	One useful question that does not suggest a false problem	“Maintenance or repair?”
Offer	Actual deliverable and any price/fee	“Seasonal tune-up at posted price”
Likely objection	Customer’s concern	“Can you quote by phone?”
Credible answer	Verified answer, approved policy and next action	“We can share fixed rates, not guess repairs”
Qualification	What a technician needs in notes	Address, unit issue, urgency, access
Red flag	Safety, consent, authority or scope blocker	Gas smell -> emergency policy

Trainer drill: 90-second battle card practice

12. Trainer chooses a service line and provides one fictional prospect scenario.
13. CSR names the ideal list filter or target account, then chooses the right opening.
14. Prospect raises one objection; CSR acknowledges, addresses if appropriate, and asks one next step or exits.
15. Observer scores accuracy, listening, offer relevance and CRM note quality.

WHAT BATTLE CARDS ARE NOT

They are not proof that a homeowner has a problem. Filters such as “pool owner” or “pet owner” identify likely audiences, not current buying intent.

04 / BATTLE CARDS

Field cards - HVAC + plumbing

Residential trade service: book the correct visit and disclose the correct fee.

HVAC | residential

CARD FIELD	FRONTLINE GUIDE
Target	Owner + Single Family + selected ZIPs. For B2B, apartments and hotels by SIC.
Ask	“Is the goal routine maintenance, solving a comfort problem, or planning a replacement?”
Offer	Verified tune-up / diagnosis / replacement estimate.
Pushback	“Can you tell me if I need a new unit?”
Response	“A technician would need to evaluate it; I do not want to guess. I can explain the visit and fee.”
Record	Equipment issue, reported symptoms, urgency, address, access, appointment/fee.
Escalate / avoid	No remote diagnosis; gas or electrical hazards -> safety escalation.

Plumbing | residential / property

CARD FIELD	FRONTLINE GUIDE
Target	Owner + Single Family + ZIP; commercial property managers/apartment operators.
Ask	“Is there an active leak or blockage, or are you planning a water-heater upgrade?”
Offer	Repair visit, inspection or verified replacement estimate.
Pushback	“Is this going to cost a fortune?”
Response	“I can explain the verified visit fee and how repair options are approved after assessment.”
Record	Leak status, shutoff/safety concern, fixture, location, customer access.
Escalate / avoid	Active hazardous flooding -> emergency protocol; no repair certainty.

04 / BATTLE CARDS

Field cards - roofing + electrical

Lead with assessment and scope; do not invent storm damage or code violations.

Roofing | residential / commercial

CARD FIELD	FRONTLINE GUIDE
Target	Owner + Single Family + ZIP; warehouses/commercial property operators for B2B.
Ask	“Are you thinking about preventative inspection, a specific concern, or replacement?”
Offer	Qualified roof inspection or written estimate.
Pushback	“Are you saying my roof is damaged?”
Response	“No. I cannot tell from a list or phone call. A qualified assessment would determine the condition.”
Record	Roof concern as described, building type, access, decision maker, next step.
Escalate / avoid	No unsupported storm/insurance claims; avoid guaranteed claim approval.

Electrical | residential / commercial

CARD FIELD	FRONTLINE GUIDE
Target	Owner + Single Family + ZIP; commercial offices and properties by SIC.
Ask	“Is this a safety concern, a repair, or an upgrade project?”
Offer	Licensed electrician visit or confirmed upgrade consultation.
Pushback	“Can I do this myself?”
Response	“I cannot safely assess that by phone. For hazards follow emergency guidance; for the project I can arrange a licensed professional.”
Record	Symptom in customer words, urgency, panel/fixture type if known, address.
Escalate / avoid	Sparks, exposed live wiring or fire -> emergency policy; no DIY hazard instructions.

04 / BATTLE CARDS

Field cards - pool service + pest control

Recurring maintenance businesses win through route density and service expectations.

Pool service | recurring residential

CARD FIELD	FRONTLINE GUIDE
Target	Owner + Single Family + Swimming Pool = Yes + service ZIPs.
Ask	“Are you looking for weekly cleaning or help with a specific pool equipment issue?”
Offer	True monthly service price/quote or equipment service visit.
Pushback	“We already clean it ourselves.”
Response	“Makes sense. If a recurring or seasonal service quote would ever save you time, I can provide the real scope.”
Record	Pool needs, frequency, address, access, gate/pet instructions.
Escalate / avoid	Do not claim pool condition; avoid quoting chemical/repair needs unseen.

Pest control | recurring residential / commercial

CARD FIELD	FRONTLINE GUIDE
Target	Owner + Single Family + ZIP, plus restaurants, hotels, apartments by SIC.
Ask	“Is there an issue you are dealing with now or are you comparing preventative plans?”
Offer	Legitimate inspection/treatment quote and follow-up plan.
Pushback	“Are treatments safe for pets and children?”
Response	“Safety depends on the product, label, application and timing. Our licensed team can explain the specific plan and precautions.”
Record	Reported pests, location, urgency, pets/occupants where operationally needed.
Escalate / avoid	No blanket “totally safe” claims; no diagnosis or health claims.

04 / BATTLE CARDS

Field cards - landscaping + cleaning

Route efficiency and recurring value depend on clear scope and correct expectations.

Lawn / landscaping | recurring or project

CARD FIELD	FRONTLINE GUIDE
Target	Owner + Single Family + clustered ZIPs; Income optional for premium projects.
Ask	“Are you after ongoing lawn maintenance or a one-time landscaping project?”
Offer	Weekly service proposal or design/estimate visit.
Pushback	“My yard is too small for you.”
Response	“We can tell you our actual minimum service area and pricing; there is no obligation to book.”
Record	Service frequency, lot/yard scope as described, address, access, HOA rules if given.
Escalate / avoid	Do not promise work outside route or hidden minimum charges.

House / carpet cleaning | recurring and one-time

CARD FIELD	FRONTLINE GUIDE
Target	Owner/Renter in separate lists; Pet Owner for specialty carpet offer.
Ask	“Is this a one-time clean, move-in/out, pet issue or recurring service?”
Offer	Published package or scope-based estimate; disclose exclusions.
Pushback	“Will you get every stain out?”
Response	“Results depend on the material and stain. We can explain our process, but cannot guarantee every stain.”
Record	Rooms, floors/surfaces, frequency, access, pets, special requirements.
Escalate / avoid	Do not guarantee stain removal; permission/ownership may be relevant.

04 / BATTLE CARDS

Field cards - property managers + hospitality

The commercial win is the approved vendor relationship or qualified introduction.

Property management | B2B recurring

CARD FIELD	FRONTLINE GUIDE
Target	Business SIC 6531 / 6513 / 6512 + service cities; verify actual management activities.
Ask	“Who selects service vendors, and where do you most need backup or overflow coverage?”
Offer	10-minute intro, certificate of insurance and documented vendor application.
Pushback	“We are not adding vendors.”
Response	“Understood. Is there a formal application for future consideration, or should I close the inquiry?”
Record	Manager role, unit count, coverage, trade, insurance requirements, next step.
Escalate / avoid	Do not pretend existing vendor relationship or promise response times.

Restaurants / hotels | B2B facilities

CARD FIELD	FRONTLINE GUIDE
Target	Restaurants SIC 5812; hotels SIC 7011; relevant local geography.
Ask	“Who is responsible for preventive service and urgent vendor coverage?”
Offer	Maintenance coverage discussion or site-specific service proposal.
Pushback	“We cannot have downtime.”
Response	“Agreed. We would only propose response commitments our operations team can actually meet. May we review your coverage requirements?”
Record	Sites, operating hours, maintenance vendor, scope, vendor onboarding.
Escalate / avoid	No guaranteed 24/7 response without operational confirmation.

04 / BATTLE CARDS

Field cards - remodeling + commercial cleaning

Long-cycle sales require realistic next steps and clean scope discovery.

Remodeling | residential project

CARD FIELD	FRONTLINE GUIDE
Target	Owner + Single Family + ZIP; Income optional; aged home-improvement leads separate.
Ask	“What room or feature are you thinking about changing, and what timeline do you have in mind?”
Offer	Planning discussion / scheduled estimate for qualified projects.
Pushback	“Can you guarantee a total price today?”
Response	“We can explain our estimating process. The accurate total depends on the final scope, materials and site conditions.”
Record	Project area, budget comfort (if volunteered), timeline, decision makers.
Escalate / avoid	No invented timeline, financing approvals or permit status.

Commercial cleaning | B2B recurring

CARD FIELD	FRONTLINE GUIDE
Target	Building operators SIC 6512, apartments 6513, offices/hotels appropriate classifications.
Ask	“Are you reviewing recurring janitorial or turnover cleaning coverage?”
Offer	Site walkthrough and written frequency/scope proposal.
Pushback	“Our current crew does that.”
Response	“That is helpful to know. Are you looking for coverage during staffing gaps or a benchmark quote?”
Record	Buildings, square footage if given, frequency, shift/access needs.
Escalate / avoid	Do not quote price per square foot without actual approved pricing basis.

05 / QA SCORECARDS

Printable outbound call scorecard - 100 points

Score an actual call. A critical fail overrides the numerical result.

CATEGORY	PTS	WHAT EARNS FULL CREDIT	SCORE
Compliance + honesty	20	Eligible channel verified; company/purpose truthful; DNC respected. Critical fail for misrepresentation or missed opt-out.	____/20
Opening + tone	15	Name/company, sales purpose, concise relevance, calm and respectful pace.	____/15
Listening + discovery	20	Asked useful non-leading questions; summarized; did not interrupt or assume need.	____/20
Offer + next step	20	Factual relevant offer, clear scope/fees, appropriate one-step close or respectful exit.	____/20
Objection + respect	15	Acknowledged, clarified once if appropriate, accurate answer; honored refusal.	____/15
CRM + close	10	Correct disposition, notes, next action, permission, DNC update if requested.	____/10

Call date: _____ CSR: _____ Coach: _____

Campaign / source: _____ Lead category: _____

Total score: ____ / 100 Critical fail? ☐ No ☐ Yes Pass? ☐ Yes ☐ No

Evidence - what the rep did well

_____

_____

One coaching behavior to improve

_____

Practice drill + next review date: _____

RATING GUIDE

90-100 = excellent, 85-89 = certified standard, 70-84 = coaching required, under 70 = retrain before independent calling. These are program design standards, not industry benchmarks.

05 / QA SCORECARDS

Printable inbound booking scorecard - 100 points

A booked appointment is only good if it is suitable, transparent and serviceable.

CATEGORY	PTS	WHAT EARNS FULL CREDIT	SCORE
Safety / compliance	20	Recognized hazards, correct escalation, recording/privacy requirements, accurate disclosures. Critical fail if missed.	____/20
Greeting + ownership	10	Warm answer, company/name, clear ownership of caller need.	____/10
Discovery + listening	20	Clarified symptoms, project, urgency and customer concerns without diagnosing.	____/20
Qualification + routing	20	Correct location, visit type, decision/access needs, escalation or routing.	____/20
Booking + recap	20	Actual availability, accurate fees, confirmed address/time/contact and next step.	____/20
CRM handoff	10	Complete readable notes, status, source, assignment, consent/permission.	____/10

Call date: _____ CSR: _____ Coach: _____

Service line: _____ Call type: Inbound / Callback / Transfer

Total score: ____ / 100 Critical fail? ☐ No ☐ Yes Pass? ☐ Yes ☐ No

Booking-quality audit

☐ Correct service and address ☐ Real appointment slot ☐ Accurate fee disclosure

☐ Customer confirms arrival window ☐ Technician notes usable ☐ Urgency routed safely

Customer trust and follow-through

What was the customer expecting? _____

What should the CSR do differently next time? _____

MANAGER ACTION

Pair one numerical score with one recording excerpt and one repeatable practice habit. A score with no coaching is only paperwork.

05 / QA SCORECARDS

Scoring standards and manager calibration

Two managers should be able to score the same call within five points of each other.

Examples of scoring

BEHAVIOR	FULL / PARTIAL / ZERO CREDIT
Introduces company	Full: identifies employer accurately; partial: delayed; zero: misrepresents (critical).
Asks questions	Full: 2-4 relevant, spaced questions; partial: scripted but usable; zero: assumes issue.
Handles objection	Full: acknowledges + accurate answer + appropriate exit; partial: generic rebuttal; zero: argues.
Explains fee	Full: fee and scope accurate before booking; partial: unclear but repaired; zero: false fee (critical).
Requests next step	Full: relevant appointment or clean exit; partial: ambiguous; zero: books without confirmation.
Logs CRM	Full: actionable detail and code; partial: minor missing note; zero: wrong record/DNC missed (critical).

Weekly 20-minute calibration protocol

16. Choose two calls (one strong, one challenging); remove sensitive personal details where feasible.
17. Each coach scores independently using the same version of the scorecard.
18. Discuss each category with a difference greater than 5 points; cite the exact customer/CSR behavior.
19. Publish the agreed “what good sounds like” example to the team.
20. Update script or rubric only when the change is approved and documented.

Critical-fail triggers (examples)

- Contacted an ineligible record knowingly or ignored a DNC request.
- Misrepresented identity, prior relationship, a lead’s inquiry, price, service or appointment availability.
- Failed to follow immediate hazard escalation instructions.
- Improperly disclosed sensitive customer information or ignored required recording permissions.

Critical failures require targeted retraining, manager review and any necessary correction, regardless of the point score.

06 / TRACKING & KPIS

Funnel tracking - definitions and formulas

Never mix inbound leads with cold outbound activity in the same conversion rate.

METRIC	DEFINITION / FORMULA	WHY IT MATTERS
Attempts	Outbound call attempts (exclude duplicate system events)	Effort indicator, not success metric
Connect rate	Live human conversations ÷ eligible outbound attempts	Lead quality, timing and dialing experience
Qualified rate	Qualified conversations ÷ connected conversations	Audience-to-offer fit
Booking rate	Confirmed appointments ÷ qualified conversations	CSR next-step effectiveness
Show/kept rate	Completed appointments ÷ appointments booked	Appointment quality and reminders
Estimate rate	Estimates presented ÷ completed appointments	Dispatch/technical handoff quality
Close rate	Jobs won ÷ estimates presented	Offer and sales effectiveness
Revenue per booked	Sold revenue attributed ÷ bookings	Total outcome, needs proper attribution
Cost per sold job	Campaign-related costs ÷ jobs sold	Unit economics by segment
Gross profit / job	Revenue minus direct job costs, ÷ jobs sold	Quality of revenue; not just volume
DNC/complaint rate	Requests/complaints ÷ connected calls (tracked separately)	Customer respect and campaign risk

Illustrative funnel math - not a forecast

ATTEMPTS	CONNECTED	QUALIFIED	BOOKED	KEPT	ESTIMATES	SOLD
400	80	24	12	10	8	4

Connect 20%; qualified of connected 30%; booked of qualified 50%; kept of booked 83%; sold of estimates 50%. These sample numbers are for training the calculations, not targets to promise customers.

LEADERSHIP RULE

If connects are low, review lists/deliverability; if booking is low, review discovery and offers; if kept is low, audit expectation setting; if close rate is low, review lead quality, quotes and technician handoff - not just CSR scripts.

06 / TRACKING & KPIS

Daily tracker and operating dashboard

Enter by CSR, service line, source/campaign, date and residential versus commercial.

Daily manager tracking sheet - reproduce weekly

CSR / DATE	ELIGIBLE ATTEMPTS	CONNECTS	QUALIFIED	BOOKED	KEPT	DNC / COMPLAINTS
_____	____	____	____	____	____	____
_____	____	____	____	____	____	____
_____	____	____	____	____	____	____
_____	____	____	____	____	____	____
TOTAL	____	____	____	____	____	____

Weekly scorecard - manager review

TOPIC	THIS WEEK	LAST WEEK	ACTION OWNER
Outreach / Connect rate	_____	_____	_____
Qualified → booked	_____	_____	_____
Booked → kept	_____	_____	_____
Estimated → sold	_____	_____	_____
Quality assurance average	_____	_____	_____
Opt-outs, complaints, critical fails	_____	_____	_____

Required manager discussion

- Which specific campaign, ZIP/SIC or service line improved?
- Was volume higher because of a better audience, or just more attempts?
- Were the appointments qualified and completed? What percent resulted in a quote or sale?
- Which one coaching or offer change will we test next week?

06 / TRACKING & KPIS

ServiceReach CRM workflows - make every next step visible

Use these process definitions whether the fields are standard or configured by your administrator.

WHEN	REQUIRED ACTION	ACCOUNTABILITY
New lead enters	Source, campaign, industry, service ZIP, contact eligibility, assigned CSR	Data / operations
Call attempted	Attempt timestamp; outcome; no fabricated connection or voicemail	CSR
Conversation occurs	Qualification notes; actual concern; call type; best allowed contact method	CSR
Appointment booked	Date/window, job type, address, verified fee, assignment, confirmed details	CSR + dispatch
Appointment completed	Technician outcome, estimate status, correct source attribution	Dispatch / field
Estimate issued	Amount, scope, approval status, planned follow-up	Estimator / sales
Job won / lost	Revenue, expected gross margin if tracked, loss reason, future work	Sales / operations
Opt-out / complaint	Immediately suppress or escalate, document owner and resolution	CSR + manager

Follow-up policy - trigger, not a blast

- Unanswered estimate: only contact within approved channel permissions and frequency; reference the actual quote.
- Booked appointment: approved confirmation and reminders; never invent arrival windows.
- Missed appointment: alert dispatch and escalate before giving the customer a new time.
- Customer no longer interested: close respectfully; suppress marketing if requested.
- B2B vendor submission: diarize an agreed review time or wait for the specified application process.

USEFUL IMPLEMENTATION PRINCIPLE

Separate contact status, sales opportunity stage, and appointment status. A “no answer” is a call outcome; “estimate sent” is an opportunity milestone; “completed” is a service appointment status.

07 / COACHING

15-minute coaching session template

Coach one controllable behavior and inspect the next call to verify improvement.

MINUTES	MANAGER ACTION
0-2	Ask CSR for a self-rating and one difficult moment.
2-6	Play a specific excerpt. Describe observed behavior, not personality.
6-9	Model one better phrase and explain why it respects the customer.
9-12	Role-play the same situation twice, changing the objection once.
12-15	CSR states the new behavior and logs next review date.

Coaching worksheet (print)

CSR: _____ Coach: _____ Review date: _____

Call / scenario: _____

Observed behavior: _____

Customer impact: _____

Replacement phrase or behavior: _____

Role-play 1 score: ____/100 Role-play 2 score: ____/100

Coach commitment: _____ Check again on: _____

Three examples of effective coaching

- Instead of “You sound pushy,” say “You repeated the price rebuttal after the customer declined; next time acknowledge and exit.”
- Instead of “You need confidence,” say “Before asking to book, explain the visit fee and allow the customer to confirm it.”
- Instead of “You never listen,” say “After the first question, pause and reflect back the key problem before introducing a second question.”

PRAISE STANDARD

Recognize strong documentation, proper opt-outs and accurate fee disclosure as much as booked appointments. Otherwise reps will optimize for the wrong outcome.

07 / COACHING

Role-play lab - 12 scenarios that reveal skill gaps

Use a CSR, a prospect and an observer. Rotate roles every eight minutes.

# / CALL TYPE	SCENARIO	PASS BEHAVIOR
01 / Inbound	HVAC caller wants a price for unknown repair	Explains verified fee; no invented diagnosis
02 / Inbound	Plumbing caller reports active flooding	Safety/dispatch escalation first
03 / Inbound	Customer says no one showed up	Apology, verify facts, manager handoff
04 / Cold consumer	Pool owner asks where phone number came from	Transparent source, opt-out available
05 / Cold consumer	Homeowner says “not interested”	Immediate polite exit
06 / Outbound	Prior inquiry is not actually verified	CSR refuses to claim an inquiry
07 / B2B	Gatekeeper asks purpose of call	Honest new business intent, vendor role requested
08 / B2B	Property manager has approved vendors	Asks optional onboarding path once, then stops
09 / Quote	Competitor is 20% less (fictional scenario)	Compares actual scope; no made-up claims
10 / Quote	Customer needs spouse approval	Provides scope; offers joint conversation
11 / Booking	Only fake calendar slots available in scenario	Does not book; escalates / checks real inventory
12 / DNC	Consumer orders “take me off the list”	Ends pitch, records immediate suppression

Observer scoring in every drill

Score 0 / 1 / 2 for each: truthful opener; listening; accurate service offer; correct objection response; appropriate next step; correct CRM note. Passing drill = ≥10/12, plus zero critical fails.

Suggested drill progression: easy → realistic → unexpected objection → recorded mock call → live supervised call (when approved).

07 / COACHING

CSR certification knowledge check

Answer in writing, then demonstrate the behavior in a recorded or observed simulation.

1. Does a purchased consumer list automatically mean you may send automated marketing texts?
Answer: _____

2. What must the CSR do if a customer says “Do not call me again”?
Answer: _____

3. What is the first safety decision if a caller reports a gas smell?
Answer: _____

4. When may a CSR state “You asked us for a quote last month”?
Answer: _____

5. What must be disclosed before booking a paid diagnostic visit?
Answer: _____

6. What is the difference between a call outcome and an opportunity stage?
Answer: _____

7. If a homeowner says “not interested,” should you try another rebuttal?
Answer: _____

8. Which four details must a correct appointment recap include?
Answer: _____

9. What is the proper response to an unknown repair price question?
Answer: _____

10. What is a strong commercial outcome when no service job is ready?
Answer: _____

11. How do you calculate outbound connect rate?
Answer: _____

12. What happens when a CSR earns 92 points but misses a critical safety step?
Answer: _____

07 / COACHING

Answer key and certification sign-off

Use the written quiz as a knowledge gate, not as a substitute for listening to real calls.

#	ACCEPTABLE ANSWER
1	No. Channel-specific permissions, consent and legal requirements apply.
2	Stop pitching, update seller-specific suppression immediately, and log it.
3	Follow company emergency protocol; direct to appropriate emergency help; do not diagnose.
4	Only with a verified inquiry attributable to that person/company and appropriate permission.
5	Exact applicable amount, assessment scope and conditions.
6	Outcome records one interaction; stage tracks the broader sale or job.
7	No. Acknowledge and end respectfully.
8	Service, date/time window, address, fee/expectations (plus contact details).
9	Quote only approved fixed prices; otherwise explain assessment and fee.
10	Vendor application, credential submission or qualified decision-maker introduction.
11	Live connections ÷ eligible outbound call attempts.
12	Critical fail overrides point score; retrain and retest before independent release.

Certification record

Trainee: _____ Manager: _____

Quiz: ____ / 12 | Mock inbound: ____ / 100 | Mock outbound: ____ / 100

Compliance/safety critical fail? ☐ Yes ☐ No CRM documentation passed? ☐ Yes ☐ No

Release status: ☐ Trainee ☐ Supervised / Provisional ☐ Certified ☐ Retraining

Manager signature: _____ Date: _____

MINIMUM STANDARD

Recommended release: written test at least 11/12; two observed mock calls ≥85/100; no critical fail; correct CRM data. Manager must also verify that live campaign permissions and processes are approved.

08 / MANAGER OPERATIONS

30-day implementation checklist

Deploy this training as an operating system, not a binder on a shelf.

WHEN	WHAT THE MANAGER COMPLETES	EVIDENCE
Days 1-3	Approve offers, pricing, calendar, compliance rules, tags, and training assets.	Signed readiness checklist
Days 4-7	Run week-one course; observe mock calls; gate live release.	Quiz and QA forms
Days 8-14	Supervise, coach twice weekly, calibrate QA, correct CRM errors.	5 scored calls / rep
Days 15-21	Review first segment economics; update battle card based on real objections.	One documented test hypothesis
Days 22-30	Certify, run weekly dashboard, adjust scripts / targeting with evidence.	Manager review and action log

What to measure monthly

- People: QA distribution, certification rate, coaching follow-through, critical fails.
- Process: contact eligibility, routing mistakes, appointment quality and complaint resolution.
- Sales: qualified-to-booked, booked-to-kept, estimated-to-sold, gross profit per sold job.
- Market: segmented results by residential versus commercial, source, ZIP, SIC, service and offer.

Regulatory / permission guardrails

- For applicable covered consumer telemarketing: follow federal, state and local rules, seller-specific DNC and National DNC review; use updated suppression data as required.
- Federal TSR calling-hour baseline is generally 8:00 a.m.-9:00 p.m. at the called person’s local time, with potential stricter state rules; train from the live approved policy.
- AI/artificial or prerecorded voice, certain automated calls and marketing texts can trigger different TCPA consent rules; do not assume a purchased list or DNC scrub establishes consent.
- Recordings, SMS/email, inbound reactivation, B2B calling and retention obligations each require their own approved policies.

This manual is operational training, not legal advice. Review the outreach method, audience, scripts and data source with counsel before launching.

REFERENCE DESK

Resource links and field-leader quick reminders

Review official guidance and update this manual when policies, offerings or regulations change.

Source materials and regulatory references

- ServiceReach Markets, Scripts & CSR Training Playbook (customer-supplied, 8 pages). Core CLEAR method, original market tables and 100-point QA weighting retained and expanded.
- FTC - Complying with the Telemarketing Sales Rule: https://www.ftc.gov/business-guidance/resources/complying-telemarketing-sales-rule
- FTC - CAN-SPAM Act: A Compliance Guide for Business: https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business
- FCC - AI-generated voice calls / TCPA declaratory ruling (FCC 24-17): https://docs.fcc.gov/public/attachments/FCC-24-17A1.pdf
- Federal telemarketing regulation (16 CFR Part 310): https://www.ecfr.gov/current/title-16/chapter-I/subchapter-C/part-310

The five things an excellent CSR does every time

1. Uses only an authorized channel and tells the truth about why they are calling.
2. Asks, listens, and repeats back the real issue.
3. Offers one relevant, appropriately priced, serviceable next step.
4. Protects customer choice, handles opt-outs immediately, and escalates hazards.
5. Leaves accurate notes and a clear owner for the next action.

ServiceReach | FIND ● MANAGE ● GROW

A customizable training resource for the home service market. Replace bracketed placeholders with your company's true prices, warranties, staffing and service policies before use.

APPENDIX A / MARKET TARGETING

Consumer market search recipes

Only use current ServiceReach/LifeSaverLeads fields: location, ownership, dwelling, pool, pet and optional income. Verify contact eligibility before outreach.

INDUSTRY	RECOMMENDED SEARCH	FIRST OFFER
HVAC	Owner + Single Family + ZIP	Tune-up / replacement estimate
Plumbing	Owner + Single Family + ZIP	Water-heater / plumbing check
Roofing	Owner + Single Family + ZIP	Roof assessment
Electrical	Owner + Single Family + ZIP	Panel / safety consultation
Garage doors	Owner + Single Family + ZIP	Door service estimate
Windows / doors	Owner + Single Family + ZIP; income optional	Replacement quote
Gutters / siding	Owner + Single Family + ZIP	Exterior estimate
Insulation	Owner + Single Family + ZIP	Comfort evaluation
Lawn care	Owner + Single Family + tight ZIPs	Recurring mowing quote
Landscaping	Owner + Single Family + ZIP; income optional	Design / maintenance quote
Tree service	Owner + Single Family + ZIP	Trimming assessment
Pest control	Owner + Single Family + ZIP	Preventative service plan
Pool cleaning	Owner + Single Family + Pool = Yes + ZIP	Monthly maintenance
Pool repair	Owner + Pool = Yes + ZIP	Equipment service assessment
Pool installation	Owner + Single Family + ZIP; income optional	Design consultation
Pressure washing	Owner + Single Family + ZIP	House / driveway quote
Fencing / decks	Owner + Single Family + Pet OR Pool segment	Fencing / deck estimate
House cleaning	Owner OR Renter; separate ZIP lists	Recurring cleaning quote
Carpet cleaning	Owner OR Renter + Pet = Yes + ZIP	Carpet / odor cleaning
Painting	Owner + Single Family + ZIP	Painting quote
Remodeling	Owner + Single Family + ZIP; income optional	Project consultation
Flooring	Owner + Single Family + ZIP; pet optional	Flooring quote
Solar	Owner + Single Family + ZIP; income optional	Feasibility review
Pet waste removal	Owner + Single Family + Pet = Yes + ZIP	Weekly yard cleanup
Junk removal	Owner OR Renter; separate ZIP lists	Cleanout estimate

Coach note: A filtered list does not prove a prospect has an active need. Use truthful, low-pressure questions and never infer a property defect from demographic data.

APPENDIX B / MARKET TARGETING

Commercial targets and SIC codes

Search Business Leads by SIC plus service geography. Test employee counts and sales-volume groups separately; validate each company's actual role.

SIC	BUYER MARKET	GOOD SERVICE MATCHES
6531	Property managers / real estate firms	Plumbing, HVAC, cleaning, maintenance
6513	Apartment building operators	HVAC, plumbing, pest, painting, landscaping
6512	Commercial building operators	HVAC, electrical, roofing, janitorial
6514	Other residential rental operators	Maintenance, cleaning, painting
6515	Mobile home parks	Septic, plumbing, electrical, landscaping
5812	Restaurants	Refrigeration, HVAC, plumbing, pest
7011	Hotels / motels	HVAC, cleaning, pools, landscaping
4225	Warehousing / storage	Roofing, HVAC, electrical, pest
5411	Grocery stores	Refrigeration, HVAC, electrical, pest
7033	RV parks / campgrounds	Septic, electrical, grounds, pools
8051	Skilled nursing facilities	HVAC, plumbing, maintenance
8021	Dental offices	HVAC, cleaning, plumbing
7542	Car washes	Plumbing, electrical, equipment repair

Three launch presets

PRESET	SEARCH	MEASURE
Pool service	Consumer: Pool Yes + Owner + ZIP	Qualified appointments / 100 conversations
Property maintenance	Business: 6512 / 6513 / 6531 + ZIP	Vendor meetings and approved accounts
Pet-focused services	Consumer: Pet Yes + Owner + Single Family + ZIP	Jobs sold and repeat-service contracts

CSR handoff: record the exact segment used, the source, the buyer's stated need, the actual next step, the appointment status, and permission to follow up. SIC 6531 includes real estate firms that do not manage rental properties; verify first.