

Notes: This is a brief call script that 1) follows up on a past repair call, 2) requests a referral (if customer feedback seems positive) and 3) briefly introduces a new service.

Asking for referrals can seem like a daunting task. Many people refrain from it for very simple reasons—they don't want to seem like a nuisance or they aren't sure how to approach the subject without sounding clunky or awkward. Don't sweat it if you feel like you don't have a knack for talking to customers—it's a learned skill!

This sort of feeling is normal but you can conquer it with a little practice and a slight shift in attitude. Tell yourself that you're not calling to bug people for referrals—you're calling to learn about their experience and give them the chance to help out their friends, families, and coworkers. You're setting up the possibility for a referral through your attention to their feedback, not hounding a customer for contact information. Keep it brief and casual.

It helps to try your first few requests on customers who you consider your "greatest fans" and are satisfied with the service you gave them. Maybe this is a customer that one of your techs felt particularly comfortable talking to. If you have customers who love the work you do, you definitely have customers who want to refer you to others.

"Good morning, **Customer Name!** This is **Jane Smith** with **Your Business Name**. Our company recently completed a service (**if possible, name what the service call was about**) in your home. I'm just following up on that visit, trying to get some feedback and see if there's anything else we can assist you with. Are you available to chat with me for a couple of minutes?

- **(IF YES)** "Great! Let me start off by saying we're honored that you chose our company for your **HVAC/Plumbing/Electrical** needs. How satisfied are you with the quality of the work completed, on a scale of 1—5? 1 being very unsatisfied, 5 being very satisfied.

- **(IF NO)** "I'm sorry to have caught you at a bad time. Would it be ok if I shot you a quick email survey about your experience with us?" (see next page for survey; Follows format of script).

Can you give me an example of something we did really well?

(Customer answers)

How about something you feel we could improve upon?

(Customer answers)

I really appreciate your feedback, **Customer Name**. This sort of constructive criticism is what keeps us on our toes and helps us provide great service for current and future customers.

Speaking of future customers—we'd love it if you would refer us to anyone you may know who could be in need of our services. **We do everything from preventative maintenance to emergency repairs. (Insert specific offers or services here, if applicable. Ex: We just set up a plumbing division in our company and can handle anything from clogged toilets to emergency plumbing repairs).**

What is their name and contact info? I'm happy to reach out to them and see how we can be of assistance.

Thanks for sharing this information with me, **Customer Name**, and for choosing **Your Company Name**. Have a wonderful day!