

Give Voice to Your Goals

**Get More from Phone Calls and
Drive your Business in Six Areas**

ServiceScore[®]



HERE'S THE GOOD NEWS

**Your customers
are already telling you
how to reach your goals.**

HERE'S MORE GOOD NEWS

**You've *already made* the
right investments to win.**





**Learn and lead by
leveraging your
phone calls.**

Got Call Recordings?

If phone calls are important in your customer journey, you probably already have servers filled with recorded interactions. Calls from toll-free numbers, pay-per-click ads and dynamically inserted numbers in digital advertising are usually recorded when a consumer calls or clicks through a website to call your business.

There's a tremendous opportunity to leverage these powerful service interactions to support staff coaching and marketing research.

Armed with insights, data and strategic recommendations based on actual phone calls, your brand can achieve breakthrough results in driving revenue, profit and an outstanding customer experience.

Get ready to crush your 2020 goals.

1. INCREASE REVENUE P. 6

2. IMPROVE CUSTOMER EXPERIENCE P. 12

3. SPARK INNOVATION P. 16

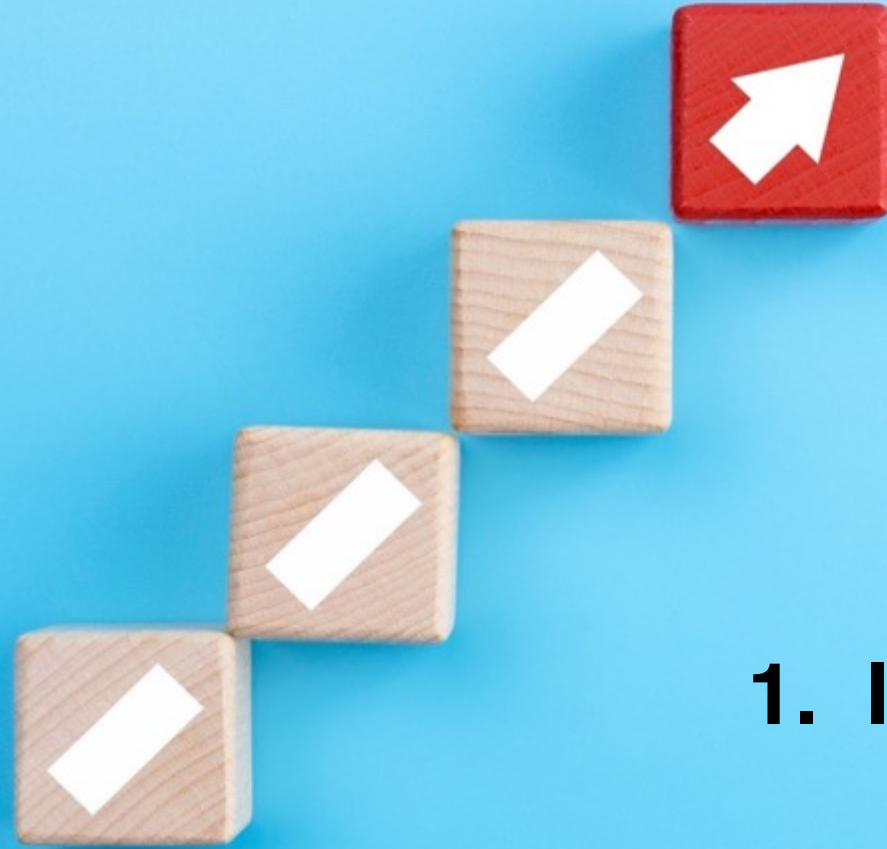
4. DELIVER MARKETING ROI P. 21

5. CREATE WORLD-CLASS OPERATIONS P. 26

6. DRIVE PROFITABILITY P. 31

BUILD THE PLAN P. 35





1. Increase Revenue

Bring more to the Top Line

Increase Revenue

Multiple ways to get more from phone calls



INCREASE CONVERSION

Make more from calls that are already coming in to your business



WOW FIRST IMPRESSION

Help customers get what they want from calls through an engaging and expert flow



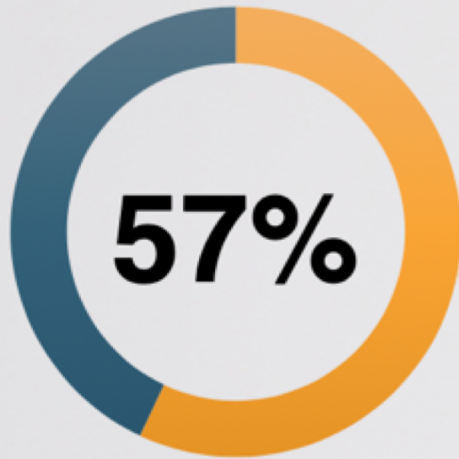
CROSS-SELLING UPSELLING

Suggest complementary products and services, by understanding caller needs

Increase Revenue

Are phone calls still important?

Business phone calls matter more than ever, especially in the purchase phase. That's why marketers rate phone calls as the highest quality lead source, beating online forms and in-person interactions.



of mobile users call a business after searching on their phone because they want to talk to a real person

Source: Google, "The Role of Click to Call in Path to Purchase"



Increase Revenue

Help more callers become customers.

| | |
|---|------------|
| How many stores (units) do you have? | 190 |
| What's the average # of Inquiry phone calls each store receives <i>per week</i> ? | 50 |
| What's the Annual Value of a Customer? | \$1,720.00 |
| What's your CURRENT conversion rate? | 30% |
| What's your GOAL conversion rate? | 34% |

Results:

| | |
|--|--------------|
| # of additional customers (systemwide, annual) | 19760 |
| Incremental revenue (systemwide, annual) | \$33,987,200 |
| Average revenue increase per store (annual) | \$178,880 |

What's the annual impact of a higher conversion rate?

With just a few inputs, you can calculate the benefit to your business from just a 4 percentage point improvement in inquiry phone calls converting to customers.

In this example, with an annual customer value of \$1720, this improvement would mean almost \$180,000 in additional revenue per location. This is almost 20,000 new customers and \$34 million for a brand with 190 locations.

Customers have 8 experiences with your brand before they pick up the phone to call.

Source: Salesforce



A WOW first impression builds trust and revenue.

After visiting your website, reading reviews and checking out social media, they're finally ready to talk to you.

The question is – does their experience on the phone align with what they've read online?

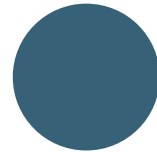
If your website promotes the brand's expertise, but the caller gets someone who can't answer their questions, they probably won't take the next step.

Creating a WOW experience on the phone starts with powerful questions and a total focus on the caller. Sure, you have to follow a sales process, but what's most important is building on what made them call your business in the first place.

A call that builds trust and expertise makes sure that everything you promise online is validated in their first human interaction with the brand – a phone call.

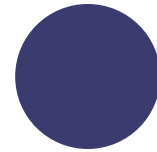
Up-selling: bringing more value to your customers.

What's the revenue impact of 1 in 5 of your customers adding a \$25 product or service based on your team's sincere, consultative selling skills on phone calls?



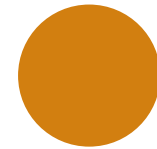
SUGGESTING COMPLEMENTARY ITEMS

It's all about learning about the caller's needs by asking about their project, business and challenges. This unlocks knowledge into ways team members can suggest products or services that help them reach their goals. Added services might include pick-up or delivery, installation, premium options, in-person visits.



CROSS-SELLING

By understanding the needs of customers, there are undoubtedly ways that your business could help beyond the caller's inquiry. And in the off-chance that you don't have the solution, you can refer the caller to other business partners that would love your referral, bringing more value to a new customer.



EDUCATING POTENTIAL CUSTOMERS

Even if a caller doesn't bite on an offer to add more today, by educating them on the breadth of products and services offered, your business can create value for future sales.



SHOWING THAT YOU CARE

The best part about upselling is that, when you do it right, it's based on great questions you've asked to learn what customers value most. A sincere suggestion on products or services that a caller might need can save the caller the time and effort in searching out another provider. You've built rapport and shown sincere, specific interest in helping your customer beyond the reason for their initial call.

2. Improve Customer Experience

Earn brand loyalty with every interaction



The easiest way to get five star reviews? Outstanding customer service.

A recent study by Yelp showed that reviews that mention “Customer Service” were 15 times more likely to be five star than one star. This is the highest correlation between any aspect of the customer experience and five star reviews than any other factor.

Customer service mentions in reviews cut both ways. While 75% of reviews that referenced good customer service were five stars, 76% of reviews that referenced bad customer service were one star.

Customer Service Quality Influences Ratings

Ratings on Yelp reviews that mention good vs. bad customer service*



*Reviews that refer to customer service positively (e.g. “awesome customer service” or “exemplary customer service”) qualify as good customer service reviews. Those that reference it negatively (e.g. “terrible customer service” or “awful customer service”) qualify as bad customer service reviews.

Source: Yelp Chart: The DataFace

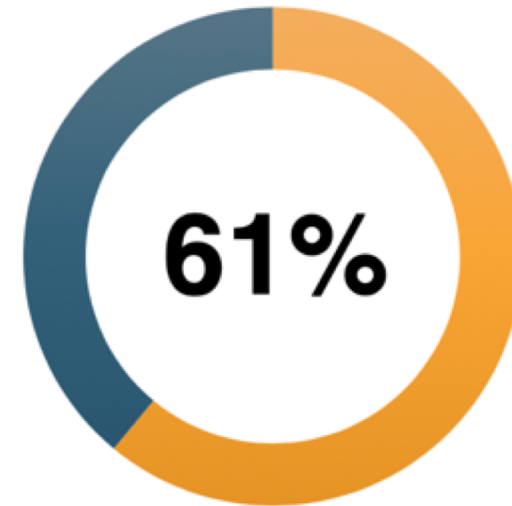
Improve
Customer
Experience

When the phone rings, opportunity is calling.

We're talking to you, Millennials.

Yes, long-gone are the days of Yellow Pages and curled up phone cords. Today, customers are doing their homework and looking for efficient ways to get what they need – and it may not include the need for a voice-to-voice interaction.

But it's for this reason that if a potential customer has decided to make a phone call – they're ready to do business. They have a question that they can't find an answer to online. They need a price quote. They're ready to set up an appointment to see it in person. They want to place an order. If they're calling, they're ready to take the next step.



of mobile searchers say that click-to-call is most valuable in the "purchase phase"

Source: Forbes

What are the 'critical few' in your customers' experience?

You can't be great at everything.

Understanding those most important aspects of your service delivery that create loyalty is key. Start from your customers' perspective. Where can you be so truly great that your customers will pay – and continue to pay for your services?

Defining these critical few is important to building a process culture that ensures zero tolerance for “drift” in these core elements of your brand.

Then, installing the right monitoring mechanisms to ensure consistent execution of these critical aspects that make your brand unique.



2. Spark Innovation

Bring new ideas to market faster



Your new product ideas are on the line.

Ideas for innovation are being shared by your customers on phone calls every day. Shorten your ideation cycle by quantifying the frequency and type of feedback from your customers.



REQUESTED PRODUCTS

What are callers asking about that you don't offer....yet?



CUSTOMER FRUSTRATIONS

What objections are preventing callers from moving forward...today?



SERVICE DELIVERY

Where are callers telling you about pain points ...that can be eliminated?



Identify opportunity by quantifying unmet customer requests

Mind the gap.

No one likes to say no to a customer. Yet, with the rapid pace of change in many industries, customer needs and opinions have evolved.

With comprehensive data on the types of requests that prevent call conversion for your business, you build a financial case for investing in new-to-the world ideas that meet this validated demand.

Competitive pressure? Innovation comes not only from new concepts but by quantifying requests for products and services your competitors offer today that aren't part of your portfolio...yet.

Deep insights come from understanding the explicit as well as subtle asks by callers that can help prioritize adds in product and services that fill a validated need – by callers that already are inclined to do business with you!



Are you getting ghosted by your customers?



But we had an appointment...

We're all busy and trying to get things done in less time. Sometimes the best laid plans go up in smoke when life gets in the way.

Or maybe we hedged our bets by booking appointments with two different providers to keep our options open. At the end of the day, we can only choose one, so someone else get's canceled or left waiting.

You can learn a lot from calls where customers say they're going to take the next step of an appointment or meeting – but, ultimately don't show up.

What could have been done on that call to increase the likelihood that the caller had kept their appointment?

And what can your team do better next time to build a bullet proof commitment that sticks until till the caller walks in your door?

Turn irritation into innovation.



How can this be made this easier?

Phone calls matter most in considered purchases, where higher investment or more complex products mean that picking up the phone to talk to a helpful expert is the easiest way to take the next step. Or at least it should be.

By understanding points in phone calls where callers become frustrated can unlock ways to make things better next time. Maybe a caller is irritated by an unexpected fee. Or that they're concerned with ways to finance a costly service. Or maybe the team is trying to show their 'expertise', but the caller just hears it as jargon. Insights abound when you quantify, analyze and remove your customers' pain points.

4. Deliver Marketing ROI

Get more from your investments



Are you getting the most from your marketing investments?

The change of pace in business and technology has dramatically reshaped the role of a marketing executive.

Today's leaders, at every level, need to be analysts, innovators and story tellers.

There's no time to be spent on unproductive data or investments that don't pay off.



Lead Quality

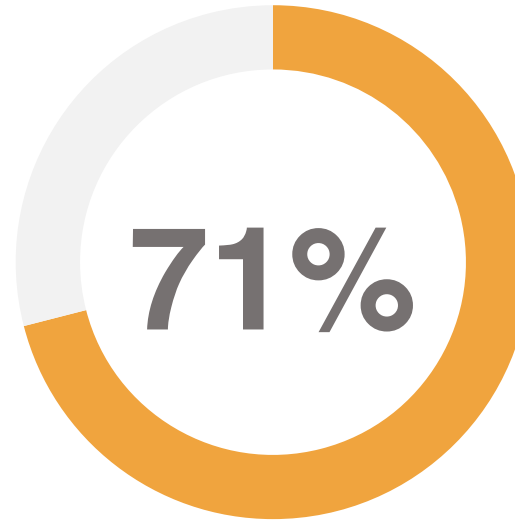


Differentiation

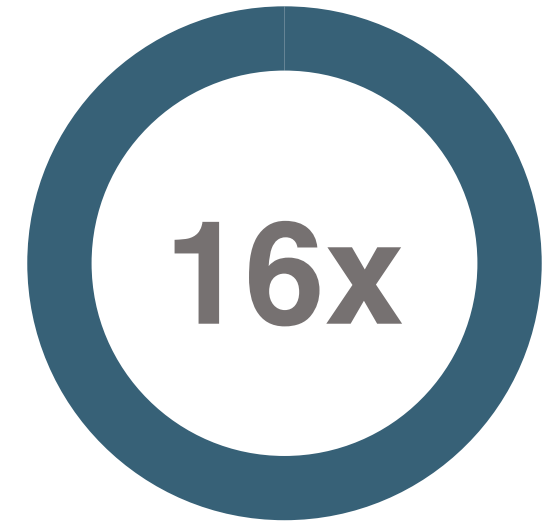


Content Strategy

Find out where your best leads come from.



of home services consumers will call to make appointments directly from search ads.
Source: Google



The amount of time average consumer invests on a phone call vs. website interaction.
Source: Invoca

And do more of that.

Even though the customer journey usually starts online, most customers still prefer to call after they've done their research. It's just the easiest way to ask questions and take the next step.

For example, in home services, over 70% of consumers want to call to make an appointment after they've found the business online. And after they've done their research and are ready to buy – or at least learn more – they're willing to invest time. A recent study found that consumers spend an average of 16 times longer on a phone call vs. a website interaction.

**Make sure
customers
know why they
should choose
your business.**

Give callers a reason to buy.

If a potential customer is calling your business, they likely need your product/service and have enough information about your company to consider doing business with you. But it's just as likely that yours isn't the only business they're calling.

How do you set yourself apart? It starts with asking Power Questions that get customers sharing about their needs or projects, which provides cues to build rapport and match what is unique about your brand to what is most important to your customers.





Content that converts.

If the customer journey starts online, what are those signposts that show the caller they're on the right path before contacting your business?

"Convince and Convert" expert, Jay Baer points out the most powerful examples of content that sells.

- **Expertise:** If someone is looking to try a product or service for the first time, they want to know that the features they're looking for and the benefits they expect are real. Data and examples that show they're choosing the right brand is key.
- **Authenticity:** consumers want to know that a product or service is for people like them, including the way they live their life. Using influencers can work, but only if doesn't come off as a paid placement.
- **Trust:** Reviews and testimonials on multiple, well-known platforms build credibility. Featuring actual quotes or access to reviews from brand sites builds further confidence.

Deliver Marketing ROI

What happens before consumers call your business?



5. Create World Class Operations

Ensure excellence every time

Training, Execution, Measurement, Accountability

Rinse and repeat.

Everyone wants to do the right thing at work. The most effective way to help your team succeed is through consistent feedback on how they're performing.

It starts with teaching them the what and why of your brand promise, then building the touchpoints to reward and coach the behaviors that create an outstanding experience, drive profitability and build employee satisfaction.



Training effectiveness comes from training focus.

Go deeper.

When a call doesn't convert to the next step, there can be many reasons why. Understanding conversion metrics are important, but data that shows why calls didn't convert is better.

Prioritizing training on the skills that your data show will have the highest impact will deliver the maximum result in the shortest time.

In this example, focusing on ways for staff to confidently ask for – and build urgency for – scheduling an appointment while on the call can impact the reasons that 2/3 of qualified inquiry calls are not resulting in an appointment.

Why Calls Didn't Convert

For calls that didn't convert, the most frequent reason is that CSR didn't ask for the appointment. There were 6 reasons that callers offered if they declined an in-home appointment invitation.



Deliver the details that drive results.



Keys to Consistent Coaching.

People learn differently, but one thing is consistent. Providing feedback that is accurate, fair and objective is key to building trust that is the foundation of change.

Varying your coaching from one-on-one to small teams to large groups can balance a personalized buy-in with group impact.

Feedback tools should be handy and ready when you are. Don't force yourself or your team to remember to go get performance reports, when they can be pushed to email inbox instead.

Most importantly, coaching tools have to be easy to use. Performance reports are most effective when they include examples of how to do things the right way. This takes the tool from a report card to a mutual coaching resource.

Improve Customer Experience

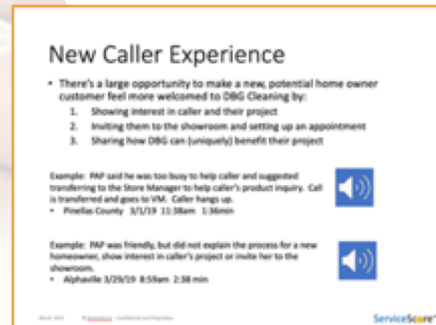
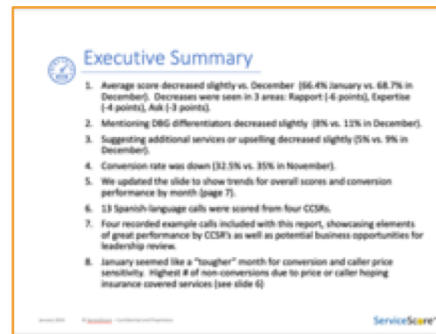
Accountability flows from visibility.

The right data at the right time to the right people.

Beyond the opportunity to coach at the individual level, rolling up the data across locations presents opportunity in new ways.

Comparing performance by region, number of years operating, business consultant and service mix unlocks powerful best practices.

Showing what's possible and building productive competition builds creditability for change that is faster, easier and more positive.



6. Drive Profitability

Get more from investments you're already making




The fastest, biggest and easiest way to drive profitability.

Making more out of investments already made.

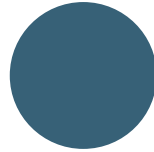
One of the most powerful results from increasing conversion rates is the impact it has on the bottom line.

Investments in sales and marketing to make the phone ring – along with staff and systems to handle inquiry calls – are already made. Every additional caller who takes the next step from those same investments means a highly profitable result. After the variable costs of the product or service are covered, the rest drops right to the bottom line.



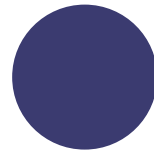


Learning from your calls gets you more from multiple investments in your business.



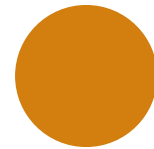
SALES AND MARKETING

Knowing where your best leads come from helps direct the sales force and sharpen marketing investments. Moving dollars to channels that perform best, while focusing on messages that sell, help you beat competition and stretch budgets.



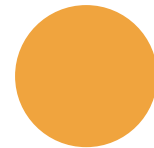
CONTACT SYSTEMS

Whether it's taking a call on a cell phone or routing to a global call center, leveraging call analytics can create a higher return on the investments in phone call systems and people.



STAFF PERFORMANCE

Great results from team members builds on itself. By praising effective conversion skills and coaching improvement areas, employees benefit from the investment of time that includes actionable data and insights.



INVENTORY

You might have invested in a new product that's sitting in a warehouse or have excess capacity available with service staff. Either way, ensuring product is moving and that staff availability is matched with demand gets easier each time a new customer buys.

Better performance means higher call conversion and so much more.

Bottom Line Results

Most businesses have a call conversion rate between 30-50%. Let's say a business gets 30 calls per week for new business – about 4 a day. Converting just one of these calls to new business at a customer value of \$200 delivers \$72,000 in added revenue – and most goes right to the bottom line.

You've already invested in the marketing, phones, people and rent – after direct product/service costs to serve this added new business, the rest is pure profit.

And better call conversion is just the beginning! Understanding and improving phone call performance helps drive upselling/cross-selling opportunities, new ideas for innovation, customer loyalty, more referrals and more.

Where else can you get this type of ROI?

Build Your Plan

Reach your goals by leveraging the powerful potential within your call recordings

A person in a dark blue suit and tie is holding a glowing white outline of the year '2024' in their right hand. The person is also holding a tablet in their left hand. A long, thin, glowing white line extends from the bottom of the '2024' outline across the bottom of the image.

2024

1. Check the foundation



Business Processes for Better Call Results



Gather DATA: Call conversion rate, lifetime value of a new customer, actual customer call recordings and metrics, average order size



Set GOALS: Impact from improvement in conversion rate, target improved order value, new product penetration, service brand awareness



Develop TRAINING: Core values, brand standards, powerful questions, customer needs, differentiators, roleplaying, overcoming objections



Measure PERFORMANCE: Quantify performance from actual call recordings, prioritize focus, link to marketing and training ROI

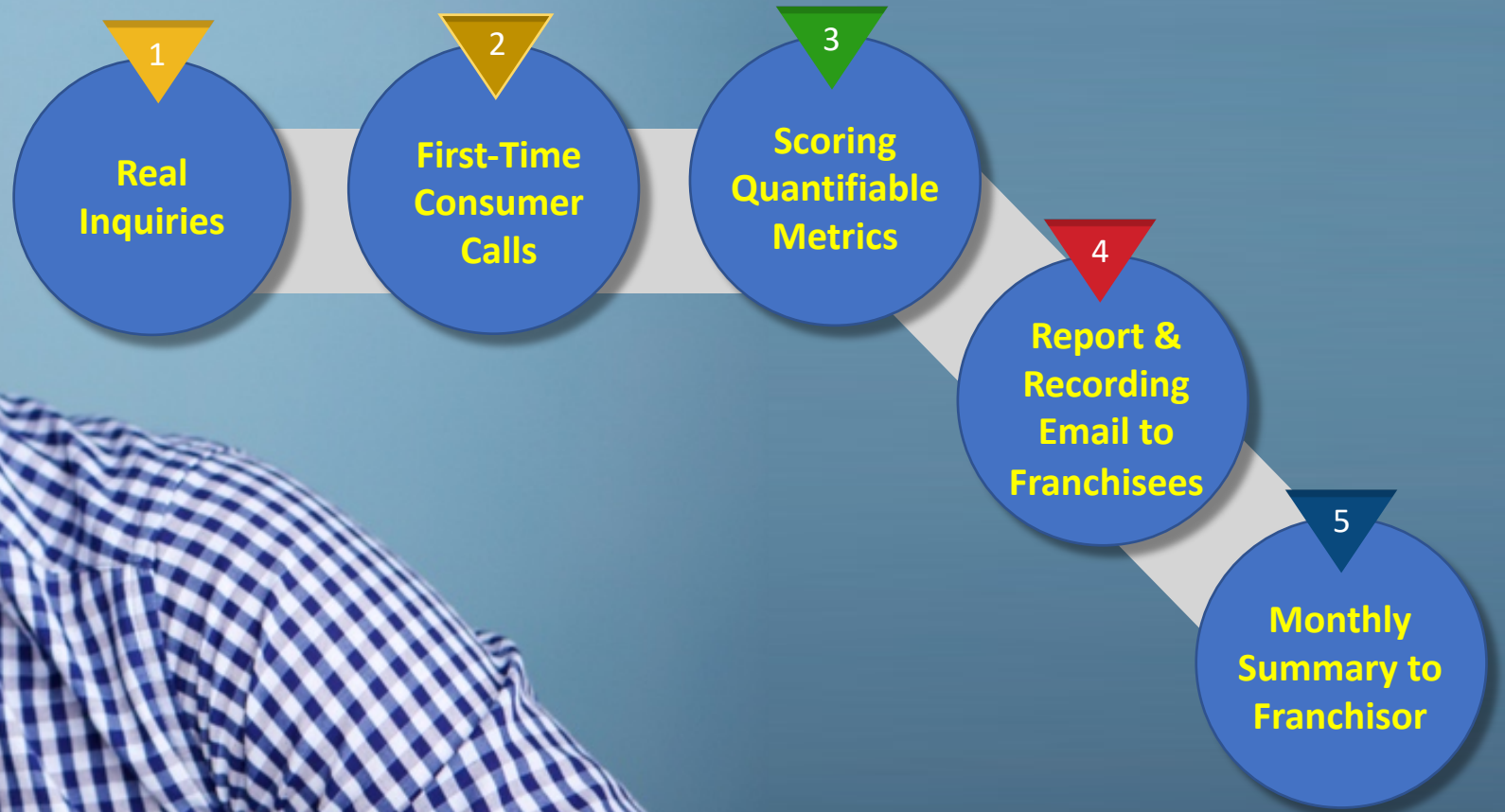


Empower COACHING: Data-based, best-practice sharing, drive business KPIs, individual and team sessions, performance incentives



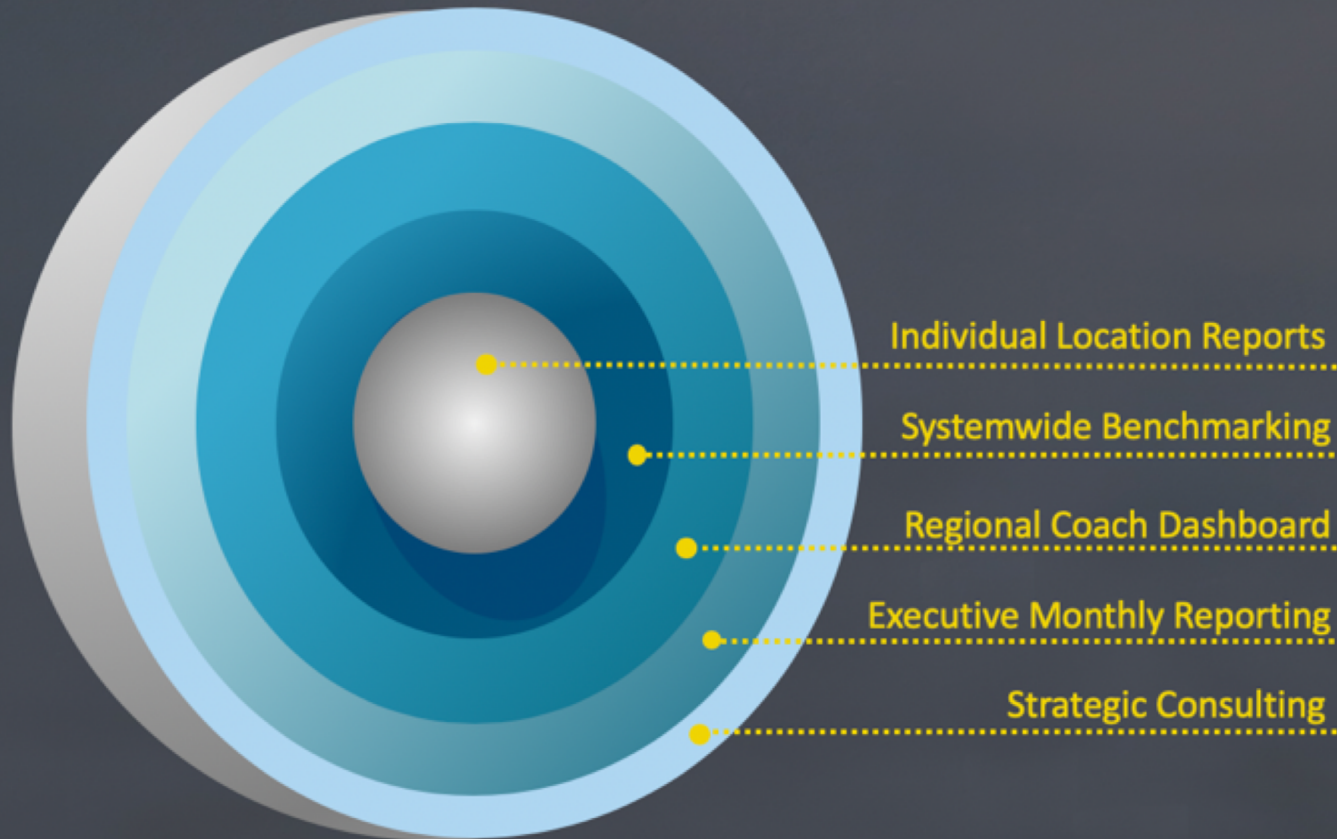
Build Your Plan

2. Measure and distribute performance metrics for effective coaching



Example: ServiceScore® Process

3. Uncover, then quantify insights to drive improvement at all levels of your organization



Get your business leaders the info they need to drive better results from phone calls.



Give Voice to Your Goals

**Get More from Phone Calls
and Drive your Business
in Six Areas**



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