

Module 1: Phone Etiquette and Customer Calm

Goal: Answer every call in a calm, clear way so the customer trusts you and the job gets started right.

About 7 minutes

All names, phone numbers, and companies in this lesson are made-up examples. They are marked "(example)".

Why This Matters to the Employer

The phone is often the first contact a customer has with the company. Before a tech ever shows up, you are the company. A calm, clear voice wins jobs. A rushed or rude one loses them.

Answering the Call

Keep your greeting short and the same every time. Use three parts:

1. The company name
2. Your first name
3. An offer to help

Script: "Thanks for calling [Company], this is [Your Name]. How can I help?"

Speak a little slower than normal. Callers are often stressed or somewhere noisy. Have your ticket screen or notepad ready before you pick up.

Get the Name and Callback Number Early

Ask for these in the first minute, before the details:

- "Can I get your name?"
- "What's the best number to reach you if we get cut off?"

Then **repeat the number back**, one digit group at a time: "That's (619) 555-0142?"

Why early? Calls drop. If you have no number, you can't call back. Once you have a name, use it. It shows you're listening.

Staying Calm With an Upset Caller

Many callers are having a bad day. They may be short with you. It's not personal. Your job is to be the steady one.

1. Listen. Let them talk first. Don't cut in. Take notes while they explain.

2. Acknowledge. Name what they're dealing with. "That sounds really stressful." "I'm sorry, no hot water is no fun." You're not admitting fault. You're showing you heard them.

3. Don't argue. Even if they have a fact wrong, don't fight it. Stay on what you can do next. "Let me look into that for you" works better than "That's not what happened."

4. Don't promise what you can't control. You don't know the exact arrival minute, the price, or what the tech will find. Promise what *you* control: "I'll get this to dispatch now and call you back by 11."

5. Give a plan. People calm down when they hear a next step. Tell them what happens now.

Safety first: If the caller mentions a gas smell, smoke, sparks, or water that won't stop, follow your company's emergency script right away. Learn that script on your first day.

Putting Someone on Hold the Right Way

Hold is fine. Bad hold is not. Do it this way:

1. **Ask first.** "Can I put you on a short hold while I check the schedule?"
2. **Wait for a yes.** Don't press the button mid-sentence.
3. **Give a time.** "It'll be about a minute."
4. **Check back.** If it's taking longer, come back and say so. "Still checking, thanks for waiting."
5. **Thank them** when you return. "Thanks for holding, [Name]."

Ending the Call With a Clear Next Step

Never hang up with the caller wondering what happens next. Before you end the call:

- **Sum it up.** "So we have you down for a 1 to 3 PM window today at 456 Sample St (example)."
- **Say who does what.** "The tech will call you about 30 minutes before arriving."
- **Give a backup.** "If anything changes, call us at this number."
- **Ask if there's anything else.** "Anything else I can help with?"
- **Thank them.** "Thanks for calling, [Name]."

Then write down what you promised in the ticket. A promise in your head isn't a promise the team can keep.

Say This, Not This

Instead of this...	Say this...
"I don't know."	"Let me find out for you."
"The tech will be there at 2:00."	"The tech will arrive between 1 and 3. They'll call when they're on the way."
"Calm down."	"I hear you. Let's get this handled."

Example Call

EXAMPLE SCENARIO. All names and numbers are made up.

Desk: Thanks for calling Example Heating & Air (example), this is Chris. How can I help?

Caller: My AC quit and it's 95 degrees in here. I've got a baby at home. I need someone now.

Desk: I'm sorry, that's rough in this heat. I'm going to help you get someone out. Can I get your name?

Caller: Maria Lopez (example).

Desk: Thanks, Maria. What's the best number if we get cut off?

Caller: (619) 555-0142.

Desk: That's (619) 555-0142?

Caller: Yes.

Desk: Got it. What's the address where the AC is?

Caller: 456 Sample St (example), San Diego.

Desk: Is anyone feeling sick from the heat right now?

Caller: No, we're okay for now. Just hot.

Desk: Okay, good. Can I put you on a short hold, about a minute, while I check the schedule?

Caller: Fine.

Desk: *(returns)* Thanks for holding, Maria. I can get a tech out today between 1 and 3 PM. The tech will call you about 30 minutes before arriving. Does that work?

Caller: Can't you do sooner?

Desk: I understand. That's the earliest open window right now. If something opens up sooner, I'll call you.

Caller: Okay. Thanks.

Desk: So we have you at 456 Sample St (example), 1 to 3 PM today, and the tech will call ahead. If anything changes, call us back here. Anything else I can help with?

Caller: No, that's it.

Desk: Thanks for calling, Maria. We'll see you this afternoon.

What went right: Chris greeted clearly, acknowledged the stress, got the name and number early, read the number back, checked for safety, asked before holding, didn't promise an exact time, and ended with a clear plan.

Quick Tips

- Same greeting every time: company, your name, "How can I help?"
- Get the name and callback number in the first minute. Read the number back.
- Listen first. Acknowledge. Don't argue.
- Promise only what you control.
- Ask before hold. Give a time. Check back.
- Safety danger? Follow the company emergency script.
- End every call with a summary and a clear next step.
- Write your promises in the ticket.

Quiz

1. Which greeting is best?

- a) "Hello?"
- b) "Thanks for calling [Company], this is [Your Name]. How can I help?"
- c) "Service department, hold please."

Answer: b. It tells the caller who they reached, who they're talking to, and that you're ready to help.

2. When should you get the caller's name and callback number?

- a) At the end of the call
- b) Only if they ask for a callback
- c) Early, in the first minute

Answer: c. If the call drops, you can still reach them.

3. A caller is upset and says, "You people never show up on time!" What's the best reply?

- a) "That's not true. We're usually on time."
- b) "I hear you, and I'm sorry that's been your experience. Let me help get this scheduled."
- c) "Calm down, please."

Answer: b. It acknowledges the feeling without arguing and moves to a next step.

4. What's the right way to put someone on hold?

- a) Press hold as soon as you need to check something
- b) Ask first, give a time, and check back if it takes longer
- c) Tell them to call back later

Answer: b. Asking and giving a time shows respect and keeps them from feeling forgotten.

5. Which is the best promise to make on the phone?

- a) "The tech will be there at exactly 2:00."
- b) "It'll only cost about a hundred bucks."
- c) "I'll send this to dispatch now and call you back by 11."

Answer: c. It's a promise you control and can keep.