107: Service Center Call Book

100: Office Administration · https://milo.masseyservices.com/docs/107-service-center-call-book/

Section: Office Administration
Subject: Service Center Call Book
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Effective Date: 1 June 2014
Last Reviewed Date: 6 June 2014
Policy Owner: Vice President of Business Development

Policy

The Service Center Call Book provides an organized and uniform system for recording, assigning and tracking all calls that come into the Service Center.

The Service Center Call Book is to be used by all Service Center Team Members to record:

- All leads
- Extra Service Requests
- Administrative Issues
- Cancellation Requests
- Personal Calls
- And any other information that warrents documentation, assignment, and follow up.

Every phone will have a Service Center Call book in order to record every incoming call. It is imperative that all calls, regardless of the nature, are recorded in the Service Center Call Book.

Service Center Call Books serve as the only documentation of all incoming calls. Therefore, when each book is complete, the "from" and "to" dates are to be recorded on the cover and the book will be stored in the **Service Center for a five year period**.

Procedures for Using the Service Center Call Book

1. Answer the phone with a smile in your voice, expressing interest, care and concern for the caller's request or problem.
2. Enter the date and time of the call.
3. Determine the nature of the call, prospect (lead), extra service, or other and record in the Service Center Call Book accordingly.
4. Write down the caller's name, address and phone number in the space provided.
5. If prospective customer, determine how they learned about our Company and record the specific "Marketing Code" as listed at the bottom of this page.
6. Under "Message/Service Requested" detail the caller's concern and/or action to tbe taken (i.e., call the customer about their service, ants in the kitchen, brown lawn, would like an estimate on service, etc.,).
7. Determine when it would be connient for a return call/visit/inspection and document on the call book. Complete the call "assigned to" area with the name of the person asigned for follow up.
8. Initial the "Call Taken By" box.
9. If the call is a lead, record the call i the "Lead Log." Refer to the Lead Log Policy for handling. (1103 Lead Log Policy, 1103-A Lead Log Policy, 1103-B Lead Log Procedures Policy).

Abbreviation	Marketing Code
T	Television Ad
DM	Direct Mail
R	Radio Ad
WL	Website
YP	Yellow Pages
RL	Referral
BB	Billboard
V	Vehicle

Abbreviation	Marketing Code
O	Other

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