Collection Call Scripts

Debt Collections Process · https://milo.masseyservices.com/docs/collection-call-scripts/

- 7-Day Call
- 30-Day Call
- 60-Day Call
- 90-Day Call

On a daily basis, you will call customers 7 days after each service is completed. Contact the customer to confirm they've received and are happy with the service. If the customer hasn't paid for service, this phone call will coincide with the date they should receive their statement in the mail. It is not our intent to ask for money during this call, merely to create goodwill and initiate additional service if any is needed.

Customer Service Specialists, CSS typically perform this call.

A typical set of interactions for the 7-day call might be:

Massey: Hello, Mrs. Brooks? This is Amy, calling from Massey Services. Our lawn specialist visited your property on December 27th and treated your landscape. I'm calling to make sure you got the service report with his treatment information and ask if you have any questions or if there is anything we can do for you at this time.

Common responses and replies include:

Customer is Satisfied (Yes, the service was great!) If the customer is satisfied, you'll thank them for choosing Massey Services, inform them of the date of their next service, how to contact us if they need us and end the call.

Customer Dissents (I don't think I received service.) Sometimes, when making the 7-day call you may get a response of dissent.

- *Mrs. Brooks: Amy, I've been meaning to call you. I got the statement for your service yesterday, but I don't remember seeing your guy. I'm not sure he was here to do the service*

- *Massey: Oh, I'm glad I called you then. If you have a moment, I'll find out what time our specialist was there and if he made any notes on the service report about your property.*
    - (Customer agrees, team member pulls the specialist's work packet for that day and replies to our customer.)
- *Massey: Mrs. Brooks, it looks like he was there from 11:10 until 11:48, and the report is signed by Jay Brooks. Does that sound right*?
- *Mrs. Brooks: Oh yes, I must have forgotten, my husband was home most of the week on vacation. Sorry about that, but I'm glad you called to let me know*.
- *Massey: It's my pleasure. Is there anything else I can do for you?*
    - (And in a perfect world), Mrs. Brooks replies that she'd like to pay while you're on the phone.

Customer Expresses Dissatisfaction (Actually, I wasn't very pleased with the service.)

There can also be scenarios where the customer is dissatisfied for one of multiple reasons:

- Ongoing insect activity
- Poor color or weed control response on a lawn
- Incomplete service (locked gate; our technician didn't follow call-ahead instructions; construction/landscape renovation/pool installation makes the property inaccessible.)

In these cases, your response should be polite, prompt, and with the goal of being back on the property the next day to resolve the issue.

- *i. Massey: Mrs. Brooks, I'm glad I called so I can make this right for you. I can have a technician/specialist at your home tomorrow after 4 p.m. to: (choose from the list below).*
    - Find the source of the insect activity and make the necessary treatment to rid your home of the insects."
    - Survey the lawn and determine what the best course of action will be."
    - Complete the service of the area that was locked. I'm sorry we didn't take care of that on our first visit, but we don't want to leave that area untreated or charge you for service that we haven't provided."

- **In the case of construction/landscape renovation/pool installation:** *Mrs. Brooks, I'm glad I called so I can make this right for you. I'd like to have our manager visit the home tomorrow after (set time).*

Voicemail

What if you get the voicemail? If you're leaving a voicemail message, something as simple as:

- *Massey: "Mrs. Brooks, this is Amy calling from Massey Services. Our service technician was at your home on December 27th, and I'm following up to be sure that you're happy with our service. If you need us for any reason, you can reach me at (407)867-5309 between 9 a.m. and 6 p.m. Monday through Friday."*

At the 30-day point, our goal is to speak to the customer to determine if there is a reason they haven't paid. Many of these customers will have only gotten a voicemail message at the 7-14-day point, as we will not assertively pursue a live conversation then.

By this time, these customers will have also gotten one statement, in addition to the service report/invoice left at the property at the time of service. We want to make these calls with the spirit of solving problems, presuming the customer has either overlooked the payment date or is withholding payment for a reason of dissatisfaction that we can correct urgently when we speak to them.

CSS is responsible for performing these calls.

A typical set of interactions for the 30-day call might be:

- *Massey: Hello, Mrs. Aaron? This is Susan, calling from Massey Services. I noticed there's a balance on your account from the pest prevention service we did last month, and I'm calling to see if you'd like me to process a payment from you over the phone.*

Common responses and replies include:

Customer Agrees to Pay ("Yes, I've been meaning to do that…")

- *Thanks, Mrs. Aaron. I'll send an email receipt for your payment. Would you like me to keep your credit card number on file so that future payments can be made automatically?"*
- End the call with *"Is there anything I can do for you today?"* and respond as needed.

Customer Wants to Pay in Future (“I plan to pay that next week.”)

- If the customer says they will make a payment, secure and document the date they intend to pay:
  - *Thanks Mrs. Aaron. Will that be later today or a week from now? I don’t want to bother you again in a few days if you’re planning to pay later this month.*
  - End the call with *“Is there anything I can do for you today?”* and respond as needed.

Customer Expresses Dissatisfaction (“Actually, I wasn’t very pleased with the service.”)

- If the customer expresses dissatisfaction with any aspect of the service, respond urgently by scheduling a return visit by the technician the same day or the next day.
  - *Massey: Mrs. Aaron, I’m glad I called so that we can correct this situation right away. Can our technician come by tomorrow between 8 and 9:00 a.m.?*

- Once the appointment is confirmed, remind the customer of our guarantee, by saying *“Mrs. Aaron, please call me the next time you notice something like this. We come out between regular service visits at no charge, as many times as we need in order to correct the problem. We want to be sure you’re happy with our service.”*

Customer Has Paid “I already paid that bill…”

If the customer answers that they’ve already paid the bill, apologize for the inconvenience, but determine when and how they paid, so we’ll know if additional follow-up calls are necessary, or if we may have misapplied a payment.

What if you get the voicemail?

If we’re only able to leave a voicemail message, call again 3 or 4 days later, preferably at a different time of day, in the evening, or on a Saturday. Continue calling every few days until we get a return call or a payment. Document all calls in the Notes section of the customer’s account.

If the customer continues to be past due at 60 days, they will receive additional calls. At this point, we consider the customer’s service suspended and won’t provide regularly scheduled recurring treatments.

If the customer has not called back to respond to 30-day messages, or has promised to pay but has not, we can approach these calls with the confidence that there is not a satisfaction issue causing the

customer to withhold payment.

As always, a review of the customer's notes, service, and payment history in ServicePro should be done prior to making this phone call.

All previous calls and commitments will be documented in the Notes section.

Office and Service Managers are responsible for completing the 60-day calls.

A typical set of interactions for the 60-day call might be:

- Massey: *Hello, Mr. Franklin? This is Ann, calling from Massey Services. I'm showing that your lawn care account has a balance of $78.00 from the service done in August. Will you be able to pay that today over the phone?*

Common responses and replies include:

Customer Expresses Dissatisfaction ("Actually, I wasn't very pleased with the service.")

- If the customer dissents, claiming dissatisfaction, agree that we will be happy to come to the property again, but we need to have the balance paid first.
  - *Massey: I'm sorry you're noticing that problem, Mr. Franklin. I'll schedule a technician to come out tomorrow at no charge, but I'll need to collect payment of $78.00 today for August's service.*

Promise to Pay at Next Service ("Can I pay during my next service?").

- If the customer would like to pay during the service visit instead, be sure there is a time scheduled for the specialist to meet the customer at the property.

Previously Filed a Complaint ("I already filed a complaint about the service…")

- If the customer says they have contacted us with a complaint and we don't have a record of it, schedule an appointment for the Service Manager to meet with the customer the same day or the next day. Don't argue with the customer about whether we've received their call, simply respond that we want to address their concern urgently with a member of management.
- As with all calls, document the activity, secure the payment commitment dates.

Unable to Pay ("I can't pay right now…")

- If the customer says they're unable to pay at this time, let them know that we'll be unable to provide service.
    - *Massey: Mr. Franklin, your regular service is due this month and we cannot provide service with a double balance. Can you make a payment for one service today, so that we can keep your regular treatment schedule in place?*

If customers are still overdue at 90 days, they will continue to receive calls. At this point, we've either gotten no response from our customer or we've gotten commitments, but no payment. If we're able to rebuild the relationship and resume service, that is the goal.

However, in many cases, at this point we're contacting the customer with a final request for them to pay before having the account written off as a bad debt and going to a collection agency. The General Manager should make these calls in tandem with the Office Manager, and the General Manager should make personal visits to the property as well.

Office and General Managers are responsible for completing the 90-day calls.

A typical set of interactions for the 90-day call might be:

- Massey: *Mrs. Paris, this is John calling from Massey Services. We've called several times to collect the $64.00 balance on your account, but it is still unpaid. I need to make arrangement for payment with you today.*
- At this point, what happens if there is resistance or dissent from the customer?
    - Any resistance or dissent from the customer at this point should be met with in person by the General Manager. If the customer has been unhappy and we haven't responded appropriately in previous months, the General Manager needs to solve the problem for the customer immediately and determine where the breakdown occurred in his service center. If the customer would like to make payment arrangements, even small monthly payments, the General Manager should secure the first of these payments while on the phone and follow up to make sure payments are made timely.

- Are there any special circumstances?
    - In all cases, if a financial situation appears temporary, and the customer has been with us for two years or more, the General Manager has the option to provide service at no charge, or to write off a balance as a good faith gesture, rather than lose a long-term customer. In all cases,

the goal is to have a satisfied customer, even if the relationship needs to end at this time, so that we maintain good faith for them to return to us at a later date when circumstances have improved.