



Customer Service Cheat Sheet

for field service company
employees



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Introduction



Customers are the lifeblood of any field service business. But dealing with customers presents all sorts of challenges that can be nerve-wracking, irritating, and even frustrating for your employees, too. That's why we created this cheat sheet of expert-approved tips and scripts for handling the most challenging customer scenarios.

Want even more helpful info?

This guide is a companion to our three-part series of customer service blogs for field service companies. Once you're done here, you can skip to what matters most to you!

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[Here's Exactly What to Say When Breaking Bad News to Customers](#)

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[How to Turn Your Field Service Engineers into Customer Service Pros](#)

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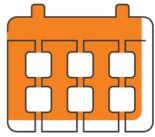
[Here's How to Handle Bad Reviews—And Turn Haters Into Supporters](#)



Scenario 1:

You have to break bad news to a customer

The rewiring project will take longer than anticipated. You ordered the wrong replacement part for a plumbing job. Your company raised its prices. You can't repair the customer's failing HVAC system. None of these announcements will endear you to a customer unless you handle them the right way. **Here's how.**



Be proactive.

If you predict that a problem may crop up down the line, let the customer know now so they can mentally prepare for the changing circumstances.



Problem-solve.

Brainstorm a solution to the problem before you break the bad news.



Make them feel smarter.

If the problem was the customer's fault, give them an 'out' by assuring them that it is a common mistake or that they made an understandable error.



Don't put yourself in the customer's shoes.

Unless you've experienced the same situation, don't patronise the customer by saying "I know how you feel".





Offer a snack.

“Sandwich” the problem between two pieces of good news i.e. “The job’s gone quickly, however, this intake valve needs replacing so I’ll need extra time; the good news, though, is I we have a spare and can replace it for you at no extra cost”.



Make it all about them.

Yes, it’s a problem for you, too - but look at it from the point of view of the upset customer.



Hold up a mirror.

Naming the customer’s feelings - “You must be so frustrated” - validates their emotions and helps them get over their negativity.



When delivering bad news, lower the pitch of your voice and speak slowly. This helps to give the impression that you’re in control of the situation. Speaking softly and slowly keeps your customer calm and helps them to focus on your advice.



All the right words

Wondering what to say when you're faced with the task of delivering bad news? These scripts can help you get a handle on the situation. Of course, you don't need to memorise them like you're an actor learning lines, but use them as a general guide to help you find the right words and sound natural.

What to say when your company is raising its prices.

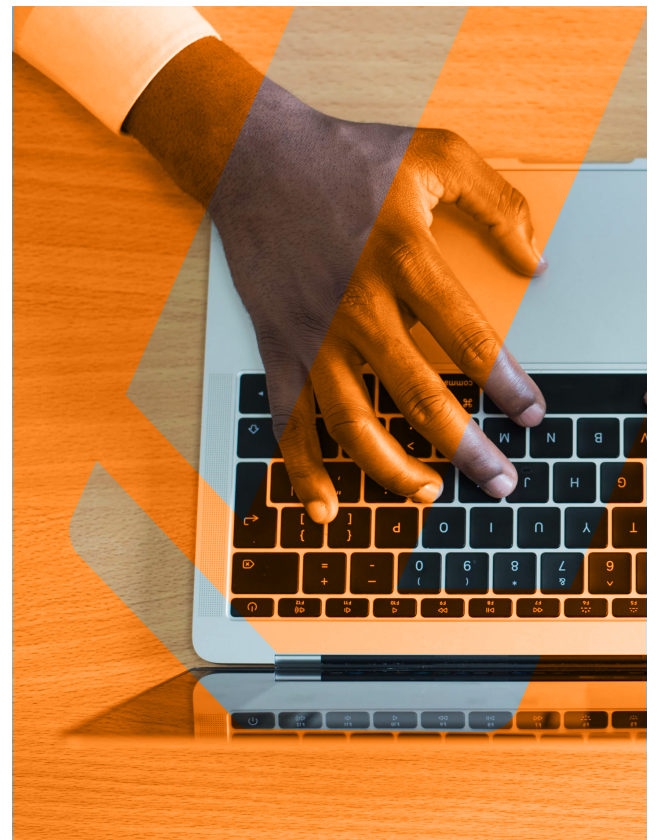
"You're an important customer, so I wanted to let you know in advance that we're raising our prices by five percent on 1st January due to increased demand. Let's talk about what work we can get done for you now, before the price increase takes effect."

What to say when the customer is starting to vent their anger at you.

"I know, it has to be frustrating to find out the project won't be done in time for your big event. Here are some options that will let us complete the most important parts of the project before the event. We can do X, Y, or Z. Which do you prefer?"

What to say when your customer makes a mistake that causes a delay with the project.

"That happened just last week to another customer/this is a common misconception/we see this a lot...it's easy to think the problem is X when it's really Y. Let's talk about how to get this fixed."



What to say when a project is delayed.

"When we're done repairing this HVAC, you won't have to worry about it again for a long time. Because the part we need is hard to find, the job is going to take three days longer than we expected, but the good news is that this fix will last much longer than if we tried to retrofit a different part."

Our expert.



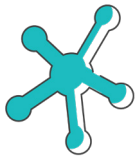
A big thank-you to Anne Miller author of the books [Make What You Say Pay!](#) and [Metaphorically Selling.](#)



Scenario 2:

You're in the field with a customer and it's awkward

If you're meeting with customers out in the field, that makes you the “face” of your company. They may be experiencing a problem, or are in need of an emergency fix which —understandably — can sometimes make for tense interactions. However, you shouldn't worry! No matter the situation, our expert advice will help you wow them with excellent customer service, make them feel comfortable, and encourage them to think of you the next time they need an installation or repair!



Talk to the team.

Getting to know employees in other departments of your company, from purchasing to sales, keeps you in the loop on developments that may benefit your customers in the field.



Say hello.

Seems obvious, but it often doesn't happen - instead, the engineer walks in and asks the customer where the broken outlet is. Take a moment to greet the customer, introduce yourself, and even engage in a little chit-chat before you get down to business.



Create an experience.

Your job is to fix or install things for the customer - but it's also to create a positive experience that goes beyond doing a good job. Consider how you can create moments where the customer feels taken care of: Can you offer advice that will save the customer money?



Let them talk.

When you walk into an emergency situation, the customer will probably want to blow off steam. Just listen - and use the tips and scripts earlier in this guide if they're relevant - then offer your solutions.





Give a show of confidence.

The last thing an anxious customer wants is a field service engineer who seems unsure of their abilities. You already have a head start on projecting a sense of confidence, because you're the expert. Stay calm, speak slowly, and explain the problem and solution.



Look into the future.

Instead of seeing each job as a one-off, cultivate the customer relationship by helping them get more value from the installation or repair. For example, you might point out other repairs they may need down the road, or offer suggestions on DIY upkeep.

Bonus tip: **Know Your Customer**

Your small- to medium-sized business actually has a big advantage over the major players in your market: You have more of an opportunity to get to know customers on a personal level, which fosters customer loyalty. Try to remember a unique detail about each customer to use as an ice-breaker the next time you see them.



All the right words

What to say when you walk through the customer's door.

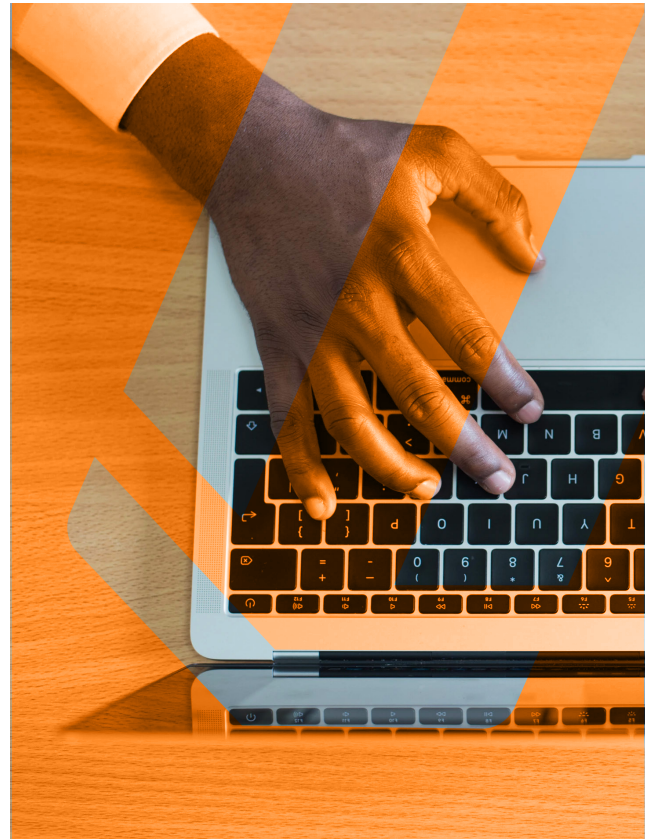
"Hi, Brandon, I'm Rick. Thanks for calling us to repair your gutters. Hey, nice dog/you have a great garden out there/good timing, since we're supposed to get a storm later this week."

What to say when your customer is upset over a broken toilet.

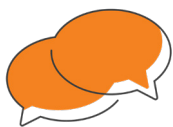
[Listen first.] "I'm with you there...no one wants to deal with a broken toilet in their office. Let's talk about the options for getting this fixed as quickly as possible: We can do X, Y, or Z."

What to say when you complete a project.

"We're all done! Your floors look beautiful now. Like we discussed last week, dark finishes can show superficial scratches, so be sure to use felt pads on the feet of your furniture, and lift heavy objects instead of dragging them across the floor. Also, here's a can of wood stain that matches your floor colour. If you notice a scratch, you can use a cotton swab to fill in the colour, then buff it with a soft cloth. If you have any questions, give us a call...here's my card."



Our expert.



Thanks to Ron Kaufman, author of Uplifting Service and Chairman of UP! Your Service, for sharing his top tips for our readers.



Scenario 3:

An angry customer leaves a (very) negative review online

If you haven't gotten a bad online review yet, you will. Some customers just like to complain, competitors may post unverified reviews of your company to make themselves look better—or you might fall down on customer service and get a negative review that's actually legit. How you handle negative reviews can chase customers away—or attract them to your company. Check out these expert tips for turning lemons into lemonade.



Solicit feedback.

Develop a feedback system and start asking your best customers to leave reviews on relevant review sites. That way, when you do get a negative review, it will be softened by glowing words from your happy customers.



Don't get defensive.

The good news about bad online reviews is that you have a chance to reflect on your response before posting it. Looking at negative reviews as helpful feedback from customers who care will keep you from getting too emotional in your reply.



Jump on it.

Make it a habit to scan through the relevant review sites, and use social media monitoring systems - some offer free trials - to track customer comments so you can respond ASAP.



Apologise...and make it right.

A 'sorry' is always appropriate if your company made a mistake, but also do what you can to rectify the situation. (And be sure to mention it in your response so other visitors see your company's strong customer service.)



**Take it off-site.**

If it's appropriate, invite the customer to call or email you directly.

**Give love to positive reviews, too.**

The customers who leave kind reviews deserve a response as well, and a simple 'thanks' shows that you care about all your customers - not just the squeaky wheels.

**Do not feed the trolls.**

(Also known as: Kill them with kindness) If a review is flat-out insulting or inaccurate - or if the customer seems unreasonable - apologise, let the customer know their experience doesn't reflect most of your customers' experiences, and move on. Don't worry, customers recognise when a review is biased or a reviewer is looking to stir up trouble.

Bonus tip: Look Beyond the Review Sites

Review sites are obvious websites to monitor, but they're far from the only platform where customers might be complaining about your company. (Or praising it!) Be sure to also check social media, personal blogs (a Google search will find mentions on blogs), and employee review sites like Glassdoor. Too busy to do it yourself? Review management software can keep track for you.



All the right words

In this case you'll be writing your response, but the principles are the same. These scripts can help you develop your own replies to respond to reviews.

What to say when you get a generic negative review.

"Jamie, thanks for your feedback. I'm so sorry our service fell short of your expectations. We're usually very good with X, but this time we slipped up. We're passionate about providing excellent customer service, so please give us a call at [number] or email [address] so we can offer you a 10% refund on the labour charges. Thanks for hiring us for your plumbing project, and we hope to work with you again soon."

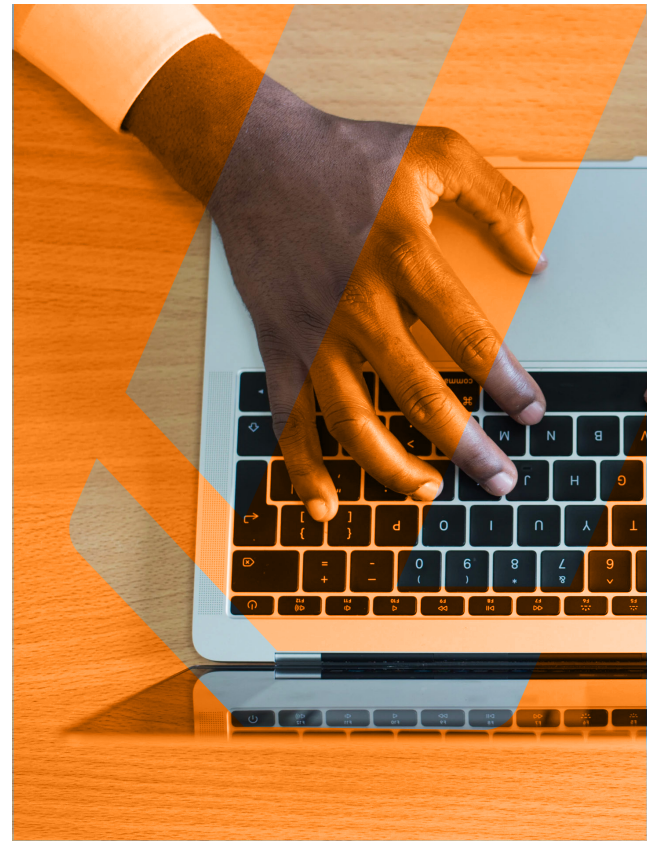
What to say when you spot a scorchingly negative review online.

"Thanks for your review, Margery. I apologise that our service wasn't up to your standards. Your experience isn't reflective of our other customers' experience... but we're always looking to improve our service, so we appreciate your letting us know."

What to say when a customer is having an immediate issue with your service.

"Jon, thanks for sharing about the problem you're having with X. Please call us at [number] so we can take care of the issue right away. You can also email [address]."
~or~

"Rob, thanks for sharing about the problem you're having with X. Our office manager will be calling you right away to fix the issue."



What to say when you get a positive review.

"Thanks for your kind review, Caitlin! We're thrilled you're so happy with the new HVAC system we installed at your business. We look forward to working with you again!"

Our expert.



Thank you to Shannon Wilkinson, CEO of [Reputation Communications](#) and author of [How To Look Better Online](#).



Offer an unrivalled customer service with Commusoft

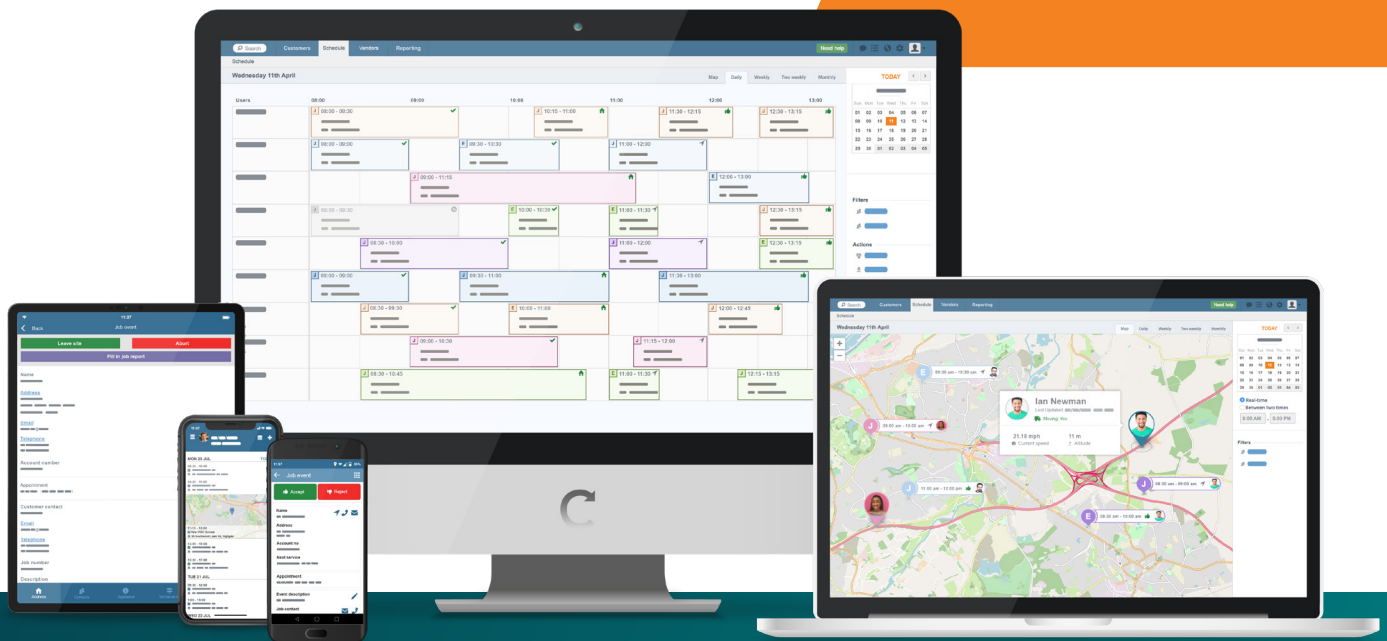
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