



**business
development**
ASSOCIATES, INC.



**A RESTORER'S
GUIDE TO
IMPLEMENTING
A CULTURE OF
CUSTOMER
SERVICE**

Scripts, Processes and Moments of Truth for
Managing the Customer Experience

Above and Beyond Service for Restoration Contractors

This handbook has been designed to illustrate the principles of Above and Beyond Service for restoration contractors. To help restorers make sense of the concepts part of this handbook “follows” the techs on an emergency water mitigation service call.

Please note that while the procedures discussed are typical for many restoration companies your specific company procedures may be different. The point is for your team to identify the concepts of Moments of Truth (MOTs), Service Circles and the overarching principles of Above and Beyond Service.

What is Above and Beyond Service?

It is the key to understanding just what your customers want and need. As we’ll soon see, it’s a lot more than just someone to perform the technical requirements of the job like doing a careful inspection, vacuuming up standing water or putting the furniture on protective blocks and pads!

While I don’t want to downplay the importance of doing a technically correct job, the truth be told, the customer presumes that your company knows how to do what you are in business to do and is what any company that does restoration will do if given the opportunity to perform.

This is why the procedures we’ll teach you in this service system will put you miles ahead of your competitors. The training program is loaded with “positive Moments of Truth”; concepts and ideas that your competition doesn’t have a clue about!

To provide Above and Beyond Service, it is important to follow the systems we’ll teach you in this program. Our approach has been developed to ensure that all the employees in your company that interact with your customers, now and in the future, achieve a consistently high level of success in delivering customer satisfaction. Remember, the customer sees the company as a whole. If anyone drops the ball, it impacts everyone!

Why ABOVE AND BEYOND SERVICE Is So Important!

Competition these days is fierce with many companies willing to do battle for the customers your company wants and needs. For this reason, we need to focus our attention on new ways of doing business that is driven by how we go about delivering service that will knock the socks off our customers.

When customers have fire or water damage, they come to us from a variety of sources. An insurance company or agent or plumber may have referred them to us, they may have seen our ad in the local newspaper or they may call us directly from our Website or social media sites. In any case, they know we can help them because that’s what we are selling.

But what distinguishes us from the competition is that we are going to get customers back to normal as quickly as possible in a way that creates customer advocates or “Cheerleaders” for our company. Remember, there is no better advertising than word of mouth and no better way to secure your own prosperity than by using these systems to create Cheerleaders.

Conversely, if we lose even one customer, we are not simply losing out today; we are losing many thousands of dollars in additional future business. Dollars that would have contributed to the growth of the company!

To keep you focused on these concepts, the easiest way is to simply think of yourself walking in your customers’ shoes. How would you feel if you were experiencing what they are? After all, in your personal life, you are a customer too. So, if you wouldn’t like what you’re feeling, more than likely neither would they.

Terminology

The language you use when dealing with customers is very important! The main issue is that what we do has many similarities to remodeling and other construction activities, but is also different in many ways.

It is important to maintain this sense of uniqueness with the customer to the maximum extent possible. So, be sure to use the vocabulary unique to our industry.

The reason for this is that if we use construction terms the customer starts to think that we are the same as the hundreds of remodelers, General Contractors and “Chucks in Trucks” that provide a wide range and level of quality construction services.

If the customer doesn’t see any difference between us and other companies, they are more likely to start shopping competitors for quotes on the repair phase of the project.

The reality is that there are processes unique to the restoration industry that these other companies don’t understand, nor are they equipped to deliver successfully. In addition, remodelers and general contractors who don’t regularly do restoration jobs are not as versed in the complexities of working with insurance companies.

Here are some common terms and the alternatives you should use with customers:

Common Term – Don’t Use	Use This Term Instead
Estimate	Scope of Work, Scope of Repair
Reconstruction, Rebuild	Repairs
Structure Department	Repair Department
Work Authorization	“Work Authorization” works really well because it is descriptive, non-threatening and specific to the situation.
Contract	Agreement
“Their” adjuster	“The” adjuster
Deductible, Collect the Deductible	Deposit in the Amount of the Deductible

It is also important to refer to the mitigation and the repair jobs (they are separate jobs for the purposes of our enterprise software) as simply Phase 1 and Phase 2 of the restoration project.

If we communicate to the customer that the jobs are separate (rather than unique phases of the same project) this is yet another opportunity for the customer to think about talking with other contractors.

Restoration Contractor: Referred to in the document as “RC”.

Awesome Restoration: Our example RC.

Intake Person: “Intake” The person/people that take the initial phone call, (first notice of loss), from the customer.

Admin/Coordinator/Customer Care Coordinator (C3): The admin staff that interacts with the customer during the loss, typically during the repair phase. Some restorers assign these duties solely to the Project Managers. In this case, sections that address the C3s apply to the PMs.

Emergency Services Responder: “ESR” The techs that respond to the emergency services phase of a loss. This could include the Water Division Manager, Lead Tech or anyone with this responsibility.

Project Manager: “PM” The person assigned to sell the repair phase of the project. In some organizations this might be an estimator who then passes the job to the Project Manager but the key is that this person closes the sale of the repair phase of the job.

Repair: Given the importance of using non-construction terms this document will model that by using the term repair in place of “reconstruction”, “recon”, “rebuild”, “build back”, etc.

Repair Division: Structure Department/Division, Construction Department, etc. (See above.)

Chuck in a Truck: Refers to the many one-man operators in the remodeling and repair business who may or may not be licensed, insured, skilled, able to deal with insurance companies, etc. But they do have a truck (and often a dog). ☺ Generally refers to operators with questionable legitimacy.

Customer: The person who the restoration is being performed for. This could be a homeowner or a business owner. In some cases, the project might not be an insurance project but for the sake of consistency the term customer will be used.

MOT: Moment of Truth. Any time a customer or potential customer comes into contact with your company and forms an opinion, positive or negative, conscious or subconscious about your company and its services.

CTL: Closing the Loop, Closing the Deal

EMS: Emergency Mitigation Services

Cheerleader: A customer who is so thrilled by their service experience with your company that they will go out of their way to act as unpaid salespeople, spreading the word about how great you are to family, friends, colleagues and associates.

The Fight for Our Customer's Hearts and Minds!

So, what we are really after is not just the opportunity to do the initial cleanup after our customer's water or fire damage, but to win them over so strongly that they become almost partners, helping our company grow by happily allowing us to complete any additional structural repairs and/or replacement as well as acting as Cheerleaders for our company in the marketplace. We are engaged in an effort to win over our customer's hearts and minds.

It's not always easy to accomplish this task. The conditions on each job are often dramatically different, no two people are exactly the same, and sometimes they aren't in the best mood.

You have to be flexible and remember your ultimate goal, no matter how difficult the situation might be, is to create Cheerleaders. You'll learn how to relax and be completely comfortable in even the most stressful situations by using the Above and Beyond Service System.

So, why are customers sometimes defensive or negative? The bottom line is that customers are conditioned to expect lousy, indifferent, apathetic and even rude service. Customers often feel that they have to fight for good service. So it's no surprise that they are sometimes aggressive and in a fighting mood when you show up at their door—even though they called your company for help.

It is important for you to realize that their frustration is not directed at you personally. Specifically, it's at situation they find themselves in and in general, it is the overall quality of service they have experienced everywhere else. And believe it or not, that's why you have an almost unlimited opportunity to create Cheerleaders for life.

People who provide emergency and repair services must realize that working in the customer's home is like being on the stage in a play. You are a performer, not just a technician. You must prepare yourself, learn your script and go on out there and do your best—for the show must go on. That's what Above and Beyond Service is all about—a script for you to follow to help meet your customers' emotional as well as technical needs.

Here's another startling reason to use this system. 80% of how your customer judges the quality of the work you perform is based on their relationship with the employees performing the service!

Seeing the World Through Your Customer's Eyes

People generally fear what they don't understand. So, let's try and get a better understanding of our customers' psyche. They see things from their own point of view and are influenced by their emotions and their expectations.

They are fearful of having people they don't know work in their space and turn their home or office upside down to deal with the inconvenience of an unplanned flooded basement or fire damage.

In the same way, they don't like buying these services because the value isn't easy to judge and they may suffer buyer's remorse if we don't address their emotional needs as well as their technical ones.

The Above and Beyond Service System is designed to help you incorporate your customer's inner needs and concerns into the performance of your job. This is not intended to be a way to try and manipulate the customer or pull the wool over their eyes, but represents the future of the service industry in general and that means your future!

The Foundation of Above and Beyond Service Systems

The key to establishing a successful business relationship and creating customer Cheerleaders is by clearly defining expectations. The customer's expectations are formed by their previous experiences or on information they receive from family or friends (or the Internet!) The basic value expectation is the minimum the customer expects just to be satisfied. They'll look at every single thing you do and compare it to this mental standard.

A fundamental component of Above and Beyond Service is what we call Moments of Truth (MOT). These MOTs are any experience a customer has with your firm where they form an impression or opinion about your company. This is often done sub-consciously and directly influences whether a customer will buy, how much they will buy and if they will buy again or refer your company to others.

The sequence of MOTs a customer encounters in their dealing with your company is known as a Service Circle. If everyone in the company recognizes that they are part of this circle, it is easy to see why everyone should be working together to create positive Moments of Truth.

The customer views all Moments of Truth as a whole, which affects the way they view your company. If any one person is creating negative moments, it affects everyone and makes achieving your company and personal goals that much harder.

Positive MOTs can be likened to putting money in the bank for a rainy day. As the job progresses, you are working to create positive MOTs in the customer's mind. The more positive Moments of Truth you have banked by being empathetic to the customer's situation and treating them with respect, concern and doing good work, the greater your opportunity will be to develop a solid rapport and keep the relationship positive, even if something goes wrong.

Consider that it takes at least 12 positive MOTs to offset a single negative one!

So, by creating positive experiences for the customer at every opportunity, you help them to build trust and confidence in your firm. Conversely, if the customer perceives the production or office staff as rude or insensitive, they may consider shopping around for another contractor to finish up the job.

Why It Seems the Customer Has Us Over a Barrel

It is very common for front line service people to avoid contact with their customers. If you do this, you will never understand what's important to them, their emotions, what you need to do to meet their minimum expectations and how you can dramatically exceed them.

Why do service people avoid this contact? It's because they're afraid they won't know how to deal with the customer's feelings and desires.

So how do we find out what our customer's concerns are? We review the information supplied by the office and we fill in the blanks by questioning the customer about the job specifics that the office has not covered yet!

By opening a dialogue we show care and concern and begin to establish rapport. In this way we are better able to understand their emotions, feelings and concerns by discovering their past experiences and problems they are facing. By asking questions, you will learn exactly what it will take to meet the customer's basic value expectations.

We build our Above and Beyond Service System around how the customer views the job. We create a mental series of MOTs and procedures for the job. By following our system, we provide consistent work and allow the customer to feel that they are in control of the job even while we are guiding the eventual outcome. This system is used to add value and make our company the very best, never to fool or cheat the customer!

When you follow the Above and Beyond Service System you don't have to face the fear of the unknown because you are aware of the series of MOTs and how to handle them in a positive way. You are prepared and in control! This allows you the freedom to take care of the details of your work.

General Rules for Above and Beyond Service Specialists

Here are some general rules for Above and Beyond specialists. While we will touch on specific rules for specific situations a bit later, here are some general rules to always follow.

- Always follow company procedures on the job site. Those procedures have been given a lot of thought so as to provide the highest levels of customer satisfaction. Never take short cuts.
- The sweetest sound in all the world is the sound of our own name. Be sure to remember the customer's name and use it often, but don't overdo it. Always call your customer using their last name, i.e. Mr. Jones or Mrs. Dawkins. If they want to be called by their first name, they'll let you know!
- Customers want to talk about themselves. They might listen to your problems but they're just being polite. They don't really care, so avoid putting them in this uncomfortable situation.
- Always give customers plenty of space. Crowding a customer can increase their fear and level of discomfort.
- Before you arrive on the job, wipe your mind clean so that you can focus on your customer and what is important to them. Leave family and other personal problems at home.
- Don't talk about other customers. Professionals maintain client relationships as privileged. If you talk about other customers, your customer will think that you'll breach their privacy too!
- Never say anything in the customer's home that you wouldn't want them to hear. You'd be surprised how often they're listening or you are being recorded!
- There is never an excuse for an unhappy customer. Avoid statements such as "I can't, I won't, I'm not allowed, It's against our policy". Give the customer solutions; don't act like the situation is out of your control. If necessary, call your supervisor to try and find solutions.
- It always pays to be courteous. Small things like picking up the newspaper as you come up the walk can score big points with your customer. And, part of courtesy in the customer's home is to always ask permission before you do anything different. For example, ask permission before you open dresser drawers to help you move it or if you need to go into the kitchen for water to fill your sprayer and so on.
- Practice good manners! Use please and thank you. Treat everyone you meet with respect, dignity and courtesy—maids, other service workers, and so on. It's a good habit for service people and a great advertisement for your company. And remember, a key Moment of Truth is how you treat your fellow workers in the customer's home.
- Apologize for being late or any time you make an error and then give the customer something extra. It might be something as small as a bottle of carpet spotter. Your supervisor will let you know what to use in these situations.
- Never make yourself look good by making someone else look bad. That includes competitors, co-workers, supervisors and so on.
- In today's world you can easily understand why one of a parent's biggest concerns is the safety of their children. For this reason, never touch or be alone with children.
- Be sure that there are no cigarettes, butts, ashtrays, coffee cups or fast food bags on the dashboard or in sight in the van. Keep a trash bag handy and use it. Always keep your vehicle clean and neat. How would you feel about the customer inspecting your truck? Sometimes, they do!
- Don't use emotionally loaded words or terms. For example: You don't tear out damaged drywall you remove it. We don't use chemicals, we use cleaning agents, detergents or treatments, and so on.

- Try never to use the customer's phone or bathroom. Make sure you have your mobile phone and stop at gas stations when you need to freshen up. Using the bathroom in a customer's home is a powerful negative MOT, especially for female clients.
- Never smoke in or anywhere near the customer's premises. If your company allows smoking in service vehicles, never throw cigarette butts out the window! Always use the ashtray and dump it into a trashcan, never onto the street! It's also a good idea not to chew gum in the customer's home but do use a breath spray or mint if you have just had a smoke and are about to enter a customer's home.
- Never, ever make sexual advances!!!
- When anyone asks you, "How's business?" always answer by saying, "Great!"
- Customers who may be difficult are known as *Discerning Clients*.
- When things go wrong, stay cool and remain calm! Appearing calm and in control is vital. You can always call for help if need be!

Now, I know that we have considered this point a variety of ways, but it bears repeating, the customer judges your company by the actions and reactions of your staff at every point of contact. The customer then mentally tallies-up their experiences and decides if you are doing a good or bad job. By the way, this is a totally subjective process and fairness doesn't factor into the equation.

Now it's Showtime!

The best way to illustrate the Above and Beyond service principles is to follow an Emergency Service Responder (ESR) through a typical job.

Of course, "on-time" means much more than simply watching the clock and punching in at the proper hour. "On-time" also means well groomed, having a clean, pressed uniform and clean/polished shoes.

"On-time" also means "checking-in" and beginning your final preparations for the day. You will have prepared your vehicle the night before, but there are some final procedures before leaving for your first appointment. "On-time" means a friendly hello for your co-workers, a "can-do-it" attitude towards the day's requirements and a careful review of any special instructions the office has provided.

From the moment you receive your first job assignment you are getting mentally and physically ready for your job. You'll perform a double check of the restoration products and materials you re-supplied the night before as well as being sure that your equipment and vehicle are clean and in top-notch working order.

As you travel, your mental focus must be upon safe and defensive driving in all traffic situations. It's important to realize that, in the service business, you aren't making money unless your equipment is in action! Your focus is to minimize wasted time. Use travel time to plan whom will perform each task at the next job. A successful team works together. Each team member should know what to do so there is no wasted time.

On your way, review the work order, paying careful attention to any special instructions. If the customer has to tell you these again, you have created a negative Moment of Truth!

Be sure that there are no negative comments on the work order and that you don't add any. Chances are good that your customer will read over your shoulder as you make final notations.

Some important considerations:

Before you leave the truck, check your fly, make sure that your shoes are clean and check your general appearance. If you have a partner, have him look you over and do the same for him.

The first job this is rarely a problem, but as the day progresses, you may need to stop at a service station to freshen up. Always keep a fresh work shirt in the van for both of you. Change if you get soiled or soaked with sweat. For this reason, it can also be helpful to wear an undershirt.

Five Minutes Out Call:

An excellent way to further deliver Above and Beyond service is to call the customer when you are five minutes away, alerting them to your arrival.

On the Job!

For this example, your job is a water damage in a home. Park the van on the street in front of the house and exit immediately! It makes customers nervous when you sit in the van.

Remember, they're waiting and watching for you so don't neglect this important Moment of Truth. If you have to check in on your phone or arrange paperwork, park around the corner and take care of this and then pull up to the job location.

Check your posture as you exit the van. Stand up straight, head up, walk confidently to the front door, using the sidewalk. Do not walk across lawns or flowerbeds. If your company uses door mats or drop cloths at the entrance, roll it up and hold it under your left arm.

If there is a doorbell, use it or else knock at the door. Don't knock when a doorbell is present. Patience is important. If you can hear the bell, so can they. Frantic ringing or knocking sets up a negative Moment of Truth indicating that you are frustrated, impatient or simply rude. You can always call the customer from your mobile phone if there is no answer.

Step back from the door about three feet so that you are in full view. Remember, the customer's primary emotion at this point is fear. They are allowing a stranger to enter their home. Your goal here is to make the customer feel comfortable.

If you are working in a two person crew, have your partner stand behind you and to the side so that both of you can be seen through the peephole or screen door. If there are steps, have your partner stand one step down from you. Remember, we want to give the customer plenty of space. Both specialists should always greet the customer at the door.

When the customer opens the door, be sure that both specialists smile. Look the customer politely in the eye and slowly extend your hand providing them with your business card. If your company uses photo identification cards, be sure they are turned right side up and in clear view.

Introduce yourself using your first and last name, your partner, and the name of your company stating why you are there. If you are at all unsure, ask the customer if you are pronouncing their name correctly and use the customer's last name unless they tell you differently.

It is important that you never refer to your partner as a helper, assistant, or junior tech, always as a partner, co-worker or teammate. Otherwise the customer will assume they are incompetent and need to be watched at all time.

If your customer is a man, include a handshake in your greeting. If a woman, let her decide whether or not she wants to shake hands.

Once you have introduced yourself to the customer, ask her permission to back the van into her driveway. Of course, your vehicle should never leak oil or other fluids onto the driveway. Explain that it's difficult to move the van once the extraction process starts. This gives the customer the opportunity to move any cars that may be blocked by the van during water removal.

Once she has given you permission, pull in or back in depending on the situation. If backing in, have one person direct you by standing behind and away from the van. This person will assist you in preventing any injury or damage to any property or persons nearby.

Again, this is a powerful Moment of Truth that shows your care and concern for her property. Once the van is in position, place your safety cones at the front and rear. This alerts people that work is in progress and that a safe distance should be maintained. It also draws additional attention to your rolling billboard!

Now it will be time to enter the customer's home. Place the mat that you had rolled up under your arm in front of or just inside the door and wipe your feet before you come in and every time you leave and re-enter the home. You are powerfully answering one of your customer's biggest unspoken fears, whether or not you will respect her home, another positive Moment of Truth.

If there are children or pets present, ask their names. Remember not to touch children and it's usually best not to pet the dog as it might bite and because you're in the home to get down to business, not frolic with the pets. If there are any particularly interesting features about the home, make a positive comment about them. "You have a lovely home" is nearly always effective.

Have you noticed how many positive Moments of Truth we have created without cleaning-up anything? Since one bad moment wipes out ten or more good moments, it pays to build a reserve of good moments as we have so far.

The ESR Inspection and Customer Interview

Once we are in the home, it's time to conduct the ESR inspection and customer interview.

Put on shoe covers before entering the home even if they tell you that you don't have to. If your procedures call for placing a mat at the door, do that as well. ALWAYS put on shoe covers when entering the home. Nothing says that you respect someone and his or her home like shoe covers.

Example script for your pre-inspection discussion with the customer:

ESR: "Before we get started, I'd like to let you know just a little about me (us) so you know who is working in your home today." (Pull out the Bio-Card(s)) Walk them through the Bio-Card and MAKE SURE you discuss the Fun Fact at the end. This personal disclosure increases trust and gives people a "handle" to grasp about you. This is one of the most important parts of the Bio-Card so make sure you discuss it without fail.

You also want to ask a few questions to deal with possible objections at this point. If you have this information now it will prevent you from being derailed at the Sit Down.

ESR: "Mrs. Jones, are you the person that will be making the decisions to proceed on this by yourself or is there someone else involved?"

PH: "Well, my husband will also be involved."

ESR: "Okay, that's fine. Can we call him/her and talk with them at the end of the inspection?"

Another issue you want to discuss in advance so you know how to handle this is whether or not they have contacted their insurance company.

ESR: "Have you spoken to your insurance company yet? What information do you have? Do you have a claim number?"

PH: "I haven't called them yet. Your office said that you would help me decide if I should."

ESR: "That's no problem. Once we see what we're dealing with I can give you the information you need to make a decision."

ESR: "Have you ever experienced a loss like this before?"

PH: "No."

ESR: "Do you know anybody who has?"

PH: "No."

ESR: "Okay. It's kind of a unique process and I'll be sure to explain all the details as we go along."

This question is very important to have an answer to when you tell them that the insurance policy requires them to take immediate action. They are often misinformed or may have a previous experience that is not in line with the way a legitimate contractor does their work.

Then, ask what is one of the most important questions in this process:

ESR: “Before we go take a look at the damage *could I ask you what your biggest concern about this situation is?*”

This is a crucial question, as it will tell you what you need to focus on going forward. For example, they might have a party coming up in three days that they want to be ready for or they might be really concerned about a \$10K deductible. Whatever it is, if you ask and find out you can tailor your conversation and perhaps the mitigation approach to address those concerns.

Be sure that you set your customer’s expectations appropriately. Don’t make promises that can’t be kept. If it is obvious that the situation cannot be improved without repair or replacement of materials or the timeframe for job completion is unrealistic, say so. It’s far better to promise less and deliver more, than to promise more and deliver less.

The ESR Inspection:

You now need to inspect the affected areas. Remember that this is a technical evaluation but this is also an important part of the sales process and, as such, is all about what and how you communicate. Don’t forget that one of your key goals is to create positive Moments of Truth.

As the homeowner takes you on a tour of the affected area(s), look for pre-existing conditions, which might impact the job or create opportunities for additional services. Look for damage such as rips, loose seams, color loss from sunlight or acne medicine, yarn damage, chipped furniture, wallpaper tears, wall dings, broken furniture legs and alike. You need to point these conditions out to the customer before you start your work.

If you find the problem before you provide service, it’s not your fault. If you find the problem after the fact, you may have a hard time convincing the customer that you didn’t cause the problem in the first place. Definitely a negative Moment of Truth! Establishing good communication before you start mitigation is just as important as the cleanup work itself!

The Script

ESR: “Can you show me the affected areas?”

PH: “Sure, it’s just down these stairs.”

When you inspect the damage, you will be taking photos, using instruments to take moisture readings and so on. Be sure you explain everything that you are doing step by step. Make sure that when you are taking readings that you show them the meter and then explain what it means.

Be sure to explain everything as you go such as what is wet and what isn’t and discuss the steps that you’ll need to take. Remember, it might be clear to you but don’t assume they understand. Take the time to explain what you are discovering.

Be sure to use the IR camera if you have one as digital and analog meters are Greek to most customers. But they can understand the images on the IR camera. Whenever you use an instrument of any kind, explain what it is for and show them the readings.

For example, if you are inserting a probe to check for wet insulation, explain that’s what you’re doing, show them the reading and tell them what it means and what the implications are.

ESR: “I’m now going to check to see if the insulation in the wall is wet. See this reading here? Normally dry insulation should be X. As you can see from the meter, it’s at Y. This means the insulation is wet. Now, we might be able to dry it in place but we might also have to remove the lower section of drywall and replace the insulation. It depends on what else we find. Let’s keep going.”

The customer is likely to want an answer fast so don’t dawdle during this process but do a thorough inspection. Ask specific questions, take photos, find affected areas/determine the extent of the damaged areas, get the information you need for the scope as quickly as reasonably possible. Don’t rush but don’t waste time either.

As you are doing the inspection you will be touching on the various elements of the mitigation process. Discuss with them the types of pad that can be dried, the nature of different types of water damage, what might have to be done and what the possible outcomes might be.

For example, “You see how the wood floor here has cupped? That means that it has taken on a lot of moisture. We have special equipment that can actually reverse this if the damage hasn’t gone too far yet. It takes a couple of days to find out and if it doesn’t work we will have to remove and replace it for you.”

This inspection is a powerful process. Go through all the affected areas, show her what the meters are telling you, explain what she will need here and what she will need there.

The Sit-Down Process and Script:

(Note: The following script covers the basics of the Sit-Down. Topics related to the claim and discussion with adjuster will not be covered here, as we are focusing only on creating positive Moments of Truth and the ESR – Customer interaction.)

Once you have gone through all the affected areas ask:

ESR: “Can we go upstairs and sit down and talk this over?”

When you are seated pull out your Inspection Brochure and review the process that you have just gone through with them in the basement. This helps them see all the steps in the process more clearly.

The steps in the Sit-Down process are:

1. Walk them through the mitigation process.
2. Prepare the price (if your company can prepare mitigation pricing on site).
3. Determine if an insurance claim has been or will be filed and assist in that process if necessary.
4. Get the Work Authorization/Contract signed and collect the deposit in the amount of the deductible (if that is your process).
5. Set up the repair phase of the project for the Project Manager.

Walk Them Through the Mitigation Process:

Using the brochure, show them the steps that you’ll be taking to perform the mitigation. You will have discussed a lot of this during the inspection so this discussion just needs to tie it all together.

The key to a successful ESR inspection is asking good questions. Once again, questions indicate your care and concern and give the customer the sense of being in control of the situation. Let’s discuss some guidelines to good questioning techniques.

DON’T ask questions that were already asked on the phone. Your office staff has already placed these on the work order and you have reviewed them before arriving at the job. However, it is fine to go over the special instructions with the customer.

If possible, don’t ask questions that a customer can’t answer as it causes them embarrassment. This can sometimes work to your advantage by demonstrating your expertise but don’t accomplish this by making the customer feel bad or uncomfortable.

You must carefully listen to the answers. Your body language must indicate that you are listening. Confirm what your customer is saying and toss in an occasional, “I see” or “Um hmm”.

Take immediate action based on what your customer tells you. For example, if the customer is concerned about the delaminated carpet in the living room, ask her to show it to you. Inspect the area carefully to determine if it can be repaired. Then offer your professional judgment. This water damage situation may be something that will require replacement of the living room carpet.

Prepare the Mitigation Price:

If you have the ability to create a firm mitigation price on site, do so. Depending on how long this typically takes, you may ask for time to complete it before the Sit-Down with the client. If you are going to ballpark the mitigation portion of the loss you will likely have been putting that together in your head during the walk-through.

ESR: “So, Mrs. Jones, this looks like about a \$5K to \$7K mitigation project. As we discussed, we’re going to have to remove the lower 4’ of drywall and insulation as well as the flooring in the affected areas. There’s no way to accurately figure the cost of the repair phase of the project but it will be at least as much as the mitigation and probably multiples of that.

“And while I’m not an adjuster the good news is that this type of loss is typically covered by a standard Homeowner’s Policy. Do you think you’d like to file an insurance claim?”

PH: “I think we’d better!”

Getting the Work Authorization/Contract Signed:

The best way to come to agreement that you will be doing the job is to ask:

ESR: “Do you have any additional questions?”

PH: “No, I think you’ve covered everything.”

ESR: “Okay, great. At this point we just need to take care of some paperwork and collect the deposit and we can get started right now (or today).” Your goal is always to take possession of the project as soon as possible.

“This Work Authorization says that you are hiring us to perform what I was telling you about and allows us to work in your home and speak with your insurance company. I want to review some other information I’m going to leave with you. (This typically would include a company brochure, warranty information, lead or asbestos information, etc. as your company policy indicates.)”

ESR: “Okay, the sooner we get everything signed and initialed the sooner we can start getting you back to normal.” Typically, you will not have any issues at this point as only a handful of people ever read the documents although if they do, simply wait patiently. Take back the originals and give copies upon request.

Get the Work Authorization/Agreement signed and collect a check or credit card deposit in the amount of the deductible (if your process calls for collecting a deposit at this point.)*

** In BDA’s Closing the Loop, Closing the Deal program we’ll cover a variety of ways you can take charge of this process smoothly and we’ll show you various methods for handling specific objections.*

Once you have this phase completed start the work or get the crew assembled to get started.

The ESR is constantly looking for fabric ringing, circling or staining possibilities, which may occur when drapes, skirts or upholstery comes into contact with wet carpets. Place drapes on hangers and carefully hang these on window sills and pull back bed spreads and pin up upholstery, bed skirts; and move or block these items up and out of the way.

Ask the customer about any computers and office equipment or if items are old or fragile, items that might break or separate when moved so that special care may be taken when handling these items. When multiple small furnishings are present ask permission to relocate them to a safe area until they can be safely put back in place.

Ask the customer where their thermostat is located. Explain that air circulation promotes faster drying and reduces the humidity levels. If they have a forced air system, turn the fan to the on position and ask them to leave it there until wet materials have dried completely.

Turn on all ceiling fans as well. It is important to maintain air circulation to promote faster drying. Special attention is needed in hot humid climates, or in homes or businesses without a forced air system.

The homeowner or businessperson needs to understand that to successfully complete the job, air movement is necessary to dry the wet materials. Discuss the occupants' limitations in terms of the use of the carpeted areas and wet hard surface floors until such time as these materials are completely dry.

Explain that in order to get the best results, and for the health and safety of children, adults, and pets, they should not come in direct contact with wet carpets or upholstery until these surfaces are completely dry.

Make sure that pets are secured in a locked room or fenced perimeter away from the water or fire damage service areas. You don't want someone's pet to get out while you're working or to come into contact with your deodorizing solutions and wet carpets.

Mitigation Procedures:

While the ESR is engaged in selling the work and reviewing the job's parameters with the customer, the second ESR is busy staging the extraction hoses and then placing the sprayer containing sanitizer/deodorizer near the front door.

He then starts the truck mount to warm up the extraction system. The items staged at the front door also include air movers, dehumidifiers, foam blocks and plastic tabs, a carpet groomer, extraction wand and stair tool. Never leave pump-up sprayers, spotting kits, or any chemicals outside the home!

Next, he coils the vacuum hoses over his shoulder and lays them out along the walkway to the front door, coiling them in an "S" pattern so they will uncoil easily when moving into the house. Try never to drag hoses around the landscaping or you will have a highly negative Moment of Truth resulting from damage to flowers and shrubbery.

Once you have reviewed the work with the customer and have the contract or Work Authorization signed, discuss with your partner the customer's concerns, the areas to be serviced along with the location where the customer would like you to start. Next, lay out hoses to the furthest point to be extracted.

Pay attention to the walls and corners as you move the hose through the house. Use wall edge protectors to prevent damage and hose stabilizing devices to prevent the hose from slipping back down staircases.

Never lean wands or tools against walls or set things on your customer's tables or furniture. Always lay them on the carpet out of the way. These are value added elements of your service that show your customer you care about protecting their home.

Once the extraction tools and drying equipment are brought inside, use a Door Guard to keep unwanted pests from entering the house and to keep heat or air conditioning from escaping. This is another important Above and Beyond service that shows that you are concerned about your customer's needs and clearly separates you from your competitors.

The next step is to move those pieces of furniture that are in harm's way. Small furnishings and breakables should be removed to another area for safety. Larger pieces should be carefully placed on blocks or plastic pads so they won't be in direct contact with wet carpets.

A powerful value-added message may be communicated at this point by putting on white gloves prior to moving furniture. Be very careful and take the time not to bump into walls or to appear as if you are rushing.

For heavy furniture, use sliders. Simply lift the item and place the slider under the leg. Once you have placed sliders under all the support legs, gently slide the furniture out of the way. Do not twist awkwardly or try to lift the furniture higher than necessary. This will prevent property damage and personal injury.

By moving, blocking or tabbing the furniture first, often you can avoid permanent furniture stains on carpet, which are a costly repair and which can potentially cancel all of your value added efforts.

In addition, you never want upholstery or drapery fabrics to come into contact with wet carpet as dyes can bleed or water can stain upholstery fabrics, ruining them, another costly expense you want to avoid if at all possible. It may take only moments for these types of problems to occur, so act quickly!

Once these areas have been thoroughly extracted, set up air movers and dehumidifiers to speed the drying process. Be sure to make note of your initial moisture readings on appropriate forms. Use tabs for furniture such as dressers, tables, etc. where only the ends of the legs will come into contact with the carpet. For bulkier items, use foam blocks to elevate the whole piece.

Be sure to extract behind doors and difficult to reach corners. If you can't position the wand to get a good seal, detach and use the vacuum hose to remove excess moisture.

When you encounter a coin or other object under or behind furniture, place in a zip lock bag with a pre-printed note that reads, "This object was found in or around your furniture during the cleanup process". Set the bag containing the item on a nearby table or if the customer is home, hand it to him or her personally.

Now that the extraction is completed, and you have set up air movers and dehumidifiers; remove your hoses from the house and carefully set them on the ground. Turn the truck mount system off so that it can cool down. Then wind hose back on the reel.

Your partner uses the load list and re-checks all areas serviced to retrieve any equipment or supplies inadvertently left on the job. Losing tools and equipment is costly and will not reflect well on your performance.

The Post-ESR/Customer Briefing:

Now it's time to conduct the post mitigation ESR briefing. Ask the customer to view the areas you have extracted and setup for drying. Discuss what you have done and ask if the furniture placement will be all right until carpets are completely dry and needed repairs are accomplished.

Also, point out any zip lock bags containing items found during the mitigation process that were not handed to the customer during mitigation. By the way, these items should never be placed in your pocket. They can be easily forgotten. Again, you are showing care and concern at every step of the way.

Remind your customer that once everything is completely dry and any needed repairs have been made, the cleaning specialists will return to finish clean carpets, perform a final set-up of rooms for use and take care of any other finishing details.

Alert the admin staff immediately when you see that repair work will be required.

It is important for the PM to contact the PH as early in the process as possible, (during mitigation if at all possible) so let the admin know immediately in order to get this process under way.

A Word About Urgency:

It is important that you convey a sense of urgency during the ESR inspection. At the same time, you don't want people to feel that they are being pressured or manipulated.

Don't scare them but nicely let them know (if you need to) that this isn't something that's going away on its own and if we let it sit it will only get worse. You really need to do the extraction and get the dry-out underway today/tonight. If you feel it is appropriate to ask more than once, you can also refer back to your brochure to substantiate the reasons why it is important to start immediately.

You can also let them know that the longer they wait, the worse it gets, the more expensive the project will be and the longer it will take to complete. Finally, you can reiterate that their insurance policy requires them to prevent further damage and that getting emergency mitigation services started meets that requirement on their part.

Third Party Validation and Credibility:

There will be times when it will be helpful to have sales aids to support what you are telling the customer. When this comes from a recognized authority that is an independent third party, this can really reinforce what you are saying.

For this reason it is important to have a copy of the, “After the Disaster” brochure, that is published by the Restoration Industry Association (RIA), our industry’s trade organization. You may not need it often, but it can be quite useful when you do.

Setting Up the Repair Phase of the Job for the Project Manager (PM):

Generally, you will know if there are going to be repairs necessary on the project based on your inspection. When you know that there will be repairs, you’ll want to “tee up” the repair phase of the project for the PM.

There are a couple of issues here that you need to address. First, you want the PH to understand that you are not just a mitigation company but that you are a full service company that will handle both phases of mitigation and repairs, but with different divisions.

You also want to discuss the job as a complete restoration project that you will take from start to finish. After all, this is why they called you—to get them back to normal; not to just do part of the project or, even worse, to be only one of the bidders for a slice of the pie.

A great tool to help you with this process is the Hourglass Graphic that is part of your sales materials.

The Script:

ESR: Let me just show you something that I think will be really helpful in terms of understanding how the insurance restoration process works. Walk them through the graphic explaining both the mitigation phase and the repair phase of the project.

Let them know that, because repairs will be required, you will be contacting the office in a few minutes to get the job assigned to a Project Manager who will handle the repair phase of the job.

Be sure to explain that the process will slow down in between the mitigation phase and the repair phase because of the involvement of the adjuster; this is quite normal and the customer should be prepared for it.

The number one reason that jobs “Go South” is not properly setting expectations for the normal slowdown that occurs between mitigation and repair. If you do a good job here, your company will have a much easier time closing the repair portion of the project and finishing the job with a happy customer.

Tell them that once we have come to agreement with the adjuster, the Project Manager will be able to discuss timelines and other details to get them fully restored to normal, ASAP.

Let them know that bottom line, once we start your project you’ll have no worries. We’ll get you back to normal as soon as possible.

Please note: *If there is no repair work to be performed, the Final Cleaning Step will follow Mitigation. If there is repair work, the next step will be to confirm the PM’s appointment.*

Project Manager Confirming the Appointment – Script:

PM: “Hi Mrs. Jones, this is Bob Builder and I’ll be the Project Manager for the second phase of your project and I’m confirming our appointment for next Tuesday at 3 p.m.

If certain product selections such as cabinets, carpeting, floor coverings, etc. will need to be made at this meeting, you will want to ask that all people involved in the decision be present. This will avoid an open ended sales process while they talk to their spouse, etc. about these decisions.

Be very careful not to say, “your wife” or “your husband” as this can be insulting. Simply say, “There are going to be some decisions regarding the type of cabinets (or whatever). We can keep the process moving as quickly as possible if everyone who will be involved in those decisions can meet with us. Will they be able to meet with us Tuesday at 3 p.m.?”

Another very important reason for having all the decision makers at this meeting is that you will be making the case for your company to complete the second phase of the project. You want everyone involved getting the whole story up front and for all questions to be answered. Then you can get the contract signed right then and there.

Pre-Sale Intelligence:

How you got the job is important because it gives an indication of the confidence level the customer has in your firm. If their insurance agent, plumber or one of your company's other strategic marketing partners referred the customer to you, this increases the odds of closing the deal because you have been validated by an independent third party.

At the same time, this will not overcome a negative experience with the mitigation crew. Therefore, you also want to get a sense of how the mitigation process is going.

You can get this information from the job file without involving anyone else. On the other hand, if you are dealing with a large repair project, take the opportunity to speak with the mitigation team doing the work to get a sense of how the project is going and what the status of the relationship is with the customer.

Remember, your desired goal is to have your meeting during the mitigation process when they are still "in pain" and to move the process along swiftly using an attitude of an "assumed close". They hired your company to return them to pre-loss condition and you are there to help facilitate the second phase of their project.

The more information you have before you go to the meeting, the better. Again, if this is a significant loss that will be important to the company, you can do additional research on LinkedIn or other social media.

The Arrival (Project Manager for Repair Phase of the Project)

The "Arrival" sets the stage for the rest of the meeting and a good beginning is very important to setting-up a good ending. We will discuss a number of components that will be incorporated into Service Circles or the "stage play" that you should plan to follow each and every time.

Arrival Components:

- Be prepared! Have your Presentation Book ready, have your Agreement ready and if any pre-work is necessary that will save time, complete that as well. Be sure that you have done your homework by checking the job file and/or speaking with the mitigation team.
- Make sure your vehicle is clean and presentable. Imagine if the homeowner asked you for a ride to pick up their car from the shop! Would you be comfortable with them hopping in the vehicle or would it be an embarrassment?
- Do everything possible to arrive on time! Arriving five minutes early is fine but don't show up much earlier than that. If you cannot avoid being late, call the homeowner as soon as you know that you will not make it on time and tell them when you are sure you can be there and ask them if that is okay. Having to do this dramatically reduces the momentum and the likelihood of making the sale so do your best to avoid this!
- Check your appearance and grooming. Be sure you are in a clean fresh shirt, hair is combed, have a mint, whatever you need to do to present the kind of person that you would want working in your home. If you smoke, try not to do so on the way to the call, as you will stink of cigarette smoke, which is highly off-putting to many people.
- Park on the street or in a designated area but do not pull into their driveway where you may be blocking their vehicle in the garage or leak oil or other fluids onto their driveway! If you have to park in the driveway be sure to ask permission, when you first speak with the homeowner.
- When you park, exit the vehicle immediately. Whether you can see them or not, assume that they are watching you.
- Remove your sunglasses and leave them in the car or remove them as you get close to the house.
- Walk to the front door on the path or sidewalk. Do not walk across the grass!
- If there is a doorbell ring it and take a step back so as not to crowd the door. If there is no doorbell, knock two or three times and take a step back.

- Put a smile on your face!
- When they open the door take a step back or down and use the first part of the greeting script below. Do not hand them a business card yet!
- You will have to blend your greeting script with being invited into their home. Be sure to use the first line at the door. “Mrs. Jones? Mrs. Jones my name is Bob from Awesome Restoration.” Use their name twice before your name once to help them understand that this call is all about them.
- Put on booties before entering the home.

The Greeting (Project Manager for Repair Phase of the Project)

The “Greeting” is one of the most important steps in the process of closing the repair portion of the job. You must develop rapport as quickly as possible and this scripted process will help you do this.

Remember that customers want care, attention and to know that they are appreciated. The key word is appreciation and a key phrase to use in your greeting script is, “I appreciate the opportunity to help you get your home and your life back to normal.”

This will reinforce the fact that your company is in the process of helping them with their property restoration and that even though they really needed you (especially during the mitigation phase) you are not taking their business for granted.

It is important to remember that listening is the greatest form of appreciation. So as much as you might want to get on with measuring for the scope, you simply can’t rush the process if you want to close the job and have a happy customer after it is all over.

You also must show that you are really engaged and ready to help. You must demonstrate this by the level of energy and attention that you bring to this conversation. You must be on your “A” game when meeting with the homeowners because they will determine your level of interest in helping them by your energy level.

It is important that you remain focused on them and their concerns and not on you and your concerns. One way to do this is to say their name twice before you say your name for the first time. This subtly affirms that this meeting is about them and not you. And, that you want to make sure that you are interacting with the right person from the beginning.

For this same reason, do not lead with your business card. Instead, present it after you go through the greeting script.

The Greeting Script:

PM: “Mrs. Jones? Mrs. Jones my name is Bob from Awesome Restoration. I appreciate the opportunity to help you get your home and your life back to normal. Did the office explain what we were going to try to accomplish today?”

(Note that asking questions helps you maintain control of the conversation without appearing to be forceful or manipulative.)

The homeowner may or may not remember or have a good sense of the purpose of the visit. From the perspective of the script it really doesn’t matter as your response will work regardless what they say.

PH: “They said you were going to...”

PM: “That’s mostly it. I know that you are busy and going through a very stressful situation. That’s why I have an agenda for our meeting, so we can make the best use of our time together today.”

Selling Yourself (the Project Manager)

The #1 reason people buy or don’t buy from a particular company is based on whether or not they trust the salesperson! In this situation you, as the Project Manager, are the salesperson and must build on the trust that the mitigation team has hopefully earned.

PM: “First of all, I am the Project Manager that will be helping you with the repair phase of your project and I’d like to start by giving you a little information about me.”

Take out your Bio Card and review it with the homeowner. (You will leave this with them. If they attempt to give it back say, “No, that’s for you.”) Go through all the professional qualifications as well as the personal items. Try to “ad lib” a statement about your role such as, “One of the things I really like about my job is the opportunity to help people who have never experienced a property loss get back to normal in as painless a way as possible.”

Make sure that you don’t forget to share with them the Fun Fact about you that is on the Bio Card. This is one of the best and quickest ways to establish rapport with the customer and it is very difficult to develop trust without first developing rapport!

Now hand them your business card. If your mobile phone is not listed, write it on the card. Either way let them know that you are always available to take their call. Tell them that if for some reason they get your voice mail, please leave a message and you will call back as soon as you break free.

The Final Cleaning and Set-up of the Job:

If there were repairs to be completed, the repair team will accomplish them utilizing the principles described in this manual.

Then, the cleaning specialists will “finish clean” the carpets involved in the water damage and review the job with the customer. They will also set up rooms, return the furniture to its pre-loss location and take care of any final details required to complete the job.

This is also a good time to point out any areas that the customer may have a concern with. Don’t try and hide from these situations. If we set the customer’s expectations properly, they should understand that there were limitations to what could be accomplished. If you discovered any pre-existing damage that may have been missed in the ESR inspection, let the PH know.

Go over the drying situation once again, reminding them that for health, safety and re-soiling reasons to keep children, pets and adults off of carpets for 3 to 12 hours or until carpets are completely dry. Have them stay on the traffic lane paper you have left in order to prevent rapid re-soiling.

It’s also good to mention that dampness magnifies carpet dyes and that the appearance will change as it dries and that this is perfectly normal.

Sincerely tell them that you understand that they have choices and you really appreciated that they chose your company and that it was a pleasure to meet them.

Let them know that you depend upon referrals and that if they were happy with your work, it would really be great if they could mention it to a few other people. In fact, in a few days, they’ll be receiving a mailing with coupons they can give to referrals or keep for their next cleaning. Let them know that if they have any questions at all, to please give the office a call.

On your way out carefully groom any cleaned areas that were disturbed by your final inspection and on the way out the door, grab the air movers, electric sprayer and any other tools that need to be loaded and thank the customer once more.

What About Discerning Customers?

An important point is that difficult customers should be seen as a challenge. Often, the person who begins in an extremely negative mood can become one of our biggest supporters once we’ve won them over.

Whether they make your day or ruin it is dependent on how you respond to them! Remember, they aren’t this way because of you. They’re this way because of the fire or water damage situation they find themselves in or past negative service experiences.

Take your time and follow the “Above and Beyond” service systems you have been learning in this training program. Pay particular attention to all Moments of Truth, giving them extra care and concern. They’ll be watching your every move, so it pays to take the extra time necessary to do everything especially well.

Avoid saying things like, “I can’t, I won’t, I don’t know, It’s not our policy. You’ll have to call the office” and so on. Resist the temptation to do battle with the customer. Remember, this customer could represent many tens of thousands of dollars in future income to you and your company!

Make sure you understand just what the customer is saying. When talking with them, use their name, be positive, then repeat back to them what your understanding is of their comments.

Sometimes you simply can’t do exactly what they want. In these cases, you can sometimes trade other services or offer other options. However, be careful to be honest so that the customer’s expectations are realistic. If you get in over your head, ask for help! Let the customer know that you need to get some additional information, go out to the van and call the office. This not only gives you a quick break from a stressful situation, but another point of view to help you make a sound decision in addressing your customers’ concerns.

Some requests are simply impractical. To cope with these situations, repeat the customer’s request. Make sure that you’re not misunderstanding what they are asking for. Look behind the words and try to figure out what’s really behind their demand. Once you have an idea of what it is they are ultimately trying to accomplish, repeat back their request with an alternative solution based on their real needs.

For example, let’s say you arrive on a job that will clearly take two hours to properly extract the water and set-up rooms for drying. The customer demands that you get it done in an hour. In this case, a little questioning will help you to better understand what’s going on. You discover that your customer is a nurse and her shift starts in two hours; she is very uncomfortable about being late for work.

Some possible choices in this case are to call the office and request a second crew to assist with the set-up so that you can finish the job within her time constraints. Or have a supervisor meet with the customer while you are there so that he can establish a rapport with her and take charge of the job when she needs to leave.

Not only have you diffused an upset customer, you’ve created a knock your socks off Moment of Truth at the same time! You’d better believe she’ll tell her friends about you and your company!

Handling Complaints

When you get a complaint, you have to fix the problem, but you also have to fix the relationship with the customer. Do this by showing the same care and concern that is a part of being a value-added representative of your company!

Always thank your customer for giving you another chance and apologize for the mistake. After all, 96% of unhappy customers don’t complain, they just never call you again.

In this training program, we focused on the customers’ actual concerns. Paying particular attention and make notes if necessary, indicates your eagerness to address their concerns. You must fix the problem cheerfully; hopefully with the customer watching; and, as you leave, thank the customer and apologize again.