Service Courtesy Calls

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Benefits Include:

• Improved Customer relations
• Customer awareness of your services
• Visibility of the Customer needs
• Discovery of new service opportunities
• Increase Market Share
• Increased revenue
Plan The Courtesy Call

• Target Specific Customers in an Area.
• Customer Research.
• Detail Customer Plan.
• Prepare the Serviceman.
• Coordinate with the Customer
• Follow up
• Build on Renewed Relationship.
Target Specific Customers

- Customer list.
- Customer Relationship information.
- Service and parts history.
- Prior issues or complaints and how resolved.
- Equipment owned
- Availability of upgrades for their equipment.
Customer Research

- Customer information
- Production requirements
- Customer Customer’s base
- Specific area of business interest
- Contact information
Detail Customer Plan

• Consolidate research information.
• Contact Customer to offer Courtesy Call.
• Determine focus for courtesy call based on Customer’s interest.
• Establish level of expectation.
• Establish schedule with Customer.
Prepare The Serviceman

• Select serviceman
• Train
• Customer information details
• Customer interests
• Review expectations
• Verify schedule and agenda
Coordinate With Customer

- Serviceman to confirm scheduled arrival.
- Professional interaction with Customer.
- Follow agenda, but be flexible.
- Perform minor service as may be required.
- Exit interview with Customer.
- Ask if their expectations have been met.
- Confirm that all requests will be responded to.
Follow Up

- Assign ownership.
- Review serviceman’s report ASAP.
- Acknowledge customer requests.
- Timely response to all requests.
- Follow up on quotes to clarify any questions.
- Build on renewed relationship with customer.
Build on Renewed Relationship

• Update internal Customer information.
• Keep Customer on active follow up list.
• Maintain Customer communications.
  – Newsletters.
  – Maintenance reminders.
  – Product updates and notices.
  – Promotional material.
  – Periodic phone call or ‘E-mail’ contact.
Share With Your Team

• Build plan with Sales staff to get even greater benefit from the investment.
• Share new product suggestions or improvements with Engineering.
Recent Experiences

- Plan several Courtesy Calls to be done by a Serviceman.
- Focus is to increase market share.
- Provide Serviceman basic sales training.
- Generated 15 -20 new quotes each week.
- Became aware of OEM equipment opportunities.
- More than pays for itself.
- Being well received by Customers.