

# Focus on the Fundamentals

facilitator / participant

## Overview

Have you ever been on an install or work order and didn't know what to say to the customer? Your ability to send a clear and friendly message is important to improving the customer experience.

In this module, you will use the assigned scripts and follow the customer interaction process from beginning to end.

# facilitator



## Module Time

60 Minutes



## Preparation and Setup

Equipment Needed:

- Participants Guide
- Flip Chart



## Introduction

During this course, you will use the assigned scripts and follow the customer interaction process from beginning to end. By using this process, you will improve the overall customer experience.

In the introduction, be sure to cover:

- The importance of following the customer interaction process
- The usefulness of the scripts



## Value and Attention Getting Activity

Discussion: Have you ever been unsure of what to say to a customer? Have you ever left a site and remembered that you forgot to tell the customer something?



## Transition to Objectives

# facilitator / participant



## Introduction

At the end of this intro, you should be able to:

- Explain why the customer interaction process is important
- Explain why the use of scripts will help you



## Value

Please fill in the following:

- Have you ever been unsure of what to say to a customer?
- Have you ever left a site and remembered that you forgot to tell the customer something?
- I think the knowledge and skills covered in this module are important because \_\_\_\_\_.



## Objectives

By the end of this training, you will be able to:

- Construct a response for each section of the customer interaction process.
  - Identify when to use each script.
  - Apply the scripts to the customer interaction process
  - Discuss why the scripts are important.
  - List the steps for the customer interaction process



## Agenda

### Introduction and Objectives

- Discussion of Objectives and Goals
- Opening discussion

### The Customer Interaction Process

- Fill in the blank Steps
- Customer Interaction Process Worksheet

### Scripts for Customer Interactions

- Determining the Main Speaking Points
- Using Scripts Role play

### Closing

- Discussion of Key Points



## Application (Measurement)

During this module you will be measured by performing the customer interaction process and using the provided scripts.

You will also need to pass a written test and performance based assessment.



## Review of Introduction

- What questions do you have before we move on?

# facilitator



## Review of Introduction

Ask the learners questions from the Review in the Participant Guide.



## The Customer Interaction Process

In this section, participants will review the steps for the customer interaction process from beginning to end by filling in blanks on a work sheet. Participants will then put the steps in the correct order.

- Review the purpose and importance of each section with the class.
- Discuss how each of these sections adds to the customer experience and how participants can remember to do each section.



## Steps for the Customer Interaction Process

Review the steps for the customer interaction process and then fill out the worksheet as a class.

1. Pre-Work
  - a. Arrive in the proper uniform
  - b. Review route and work orders
  - c. "Do I have everything I need?"
2. Prior to Arrival
  - a. Call customer to provide status on arrival time
3. Arrival/Meet and Greet
  - a. Double check work order, verify at correct address
  - b. Notify dispatch of arrival time
  - c. Place cones correctly, take clipboard with work order to the door

4. Site Survey/Installation
  - a. Perform site survey; create installation plan
  - b. Follow CQI throughout site survey and installation
5. Customer Education
  - a. Advise customer the installation is complete
  - b. Follow CQCE throughout the Customer Education process



## Review the Customer Interaction Process

Begin with the usual open-ended, *"What questions do you have?"*

If questions are minimal, ask learners questions from the Participant Guide intro and review sections.

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## The Customer Interaction Process

By the end of this section, you should be able to:

- List the steps for the customer interaction process
- Employ the customer interaction process



## Steps for the Customer Interaction Process

Fill in the steps for the customer Interaction Process.

### 1. Pre-Work

- Arrive in the proper uniform
- Review route and work orders
- "Do I have everything I need?"

### 2. Prior to Arrival

- Call customer to provide status on arrival time

### 3. Arrival/Meet and Greet

- Double check work order, verify at correct address
- Notify dispatch of arrival time
- Place cones correctly, take clipboard with work order to the door

### 4. Site Survey/Installation

- Perform site survey; create installation plan
- Follow C&I throughout site survey and installation

### 5. Customer Education

- Advise customer the installation is complete
- Follow C&CE throughout the Customer Education process



## Review the Customer Interaction Process

- How will you remember all the steps of the customer interaction process?
- Name 5 steps of the customer interaction process.



# facilitator



## Review the Customer Interaction Process

Ask the learners questions from the Review in the Participant Guide.



## Scripts for Customer Interactions

In this section participants will learn to use the scripts from the customer interaction process by determining the main speaking points for each script. Participants will then use the scripts and role-play the customer interaction process with a partner. They will then be given customer and process cues to determine the proper response.

By the end of this section, you should be able to:

- Construct a response for each section of the customer interaction process.
- Identify when to use each script.
- Apply the scripts to the customer interaction process
- Discuss why the scripts are important.



## Determining the Main Speaking Points

Read through the following scripts as a class.

1. Call-Ahead Script
  - *Hello, this is (your name) with Dish Network. Is Mr./Ms. \_\_\_\_\_ available? I'm calling to let you know that I am your DISH Network Technician and I plan to arrive in (ETA) minutes. Will you be available when I arrive? I would like to remind you to secure any pets, make sure someone 18 years or older is home during the installation, and please make sure the TV you want service on is there, turned on and moved away from the wall. Thank you and again, I will be there in about (ETA) minutes.*
2. Voice Mail/Answering Machine Script

- Hello, this message is for Mr./Ms. \_\_\_\_\_. This is (your name) with Dish Network calling to let you know that I am your DISH Network Technician and I am heading in your direction. I plan on arriving in (ETA) minutes. The current time is (xx:xx am/pm). I also want to remind you to secure any pets that you may have, and please make sure that someone who is 18 years or older, is home during the installation. If you need to contact us, please call 1-800 333-3474. Thank you and again, I will be there in (ETA).

### 3. Next-In-Line Script

- Hello, this is (your name) with Dish Network. Is Mr./Ms. \_\_\_\_\_ available? I'm calling to let you know that I plan to arrive between (xx:xx) and (xx:xx). Will you be available when I arrive? I would like to remind you that someone who is 18 years or older is required to be home during the installation. Thank you and I will call again when I am enroute to your home.

### 4. Greet the customer

- "Hello, I am (insert name) with DISH Network and are you Mr./Ms. \_\_\_\_\_. First of all, thank you for choosing DISH Network. I will be setting you up with (work order type) with our (programming package, plus HD if applicable). I am going to start by conducting a survey of your home to ensure I can find the best location for the dish and where the receiver(s) will be located. May I come in so you can show me where your TVs are located?"

### 5. Review site survey with customer

- "I have completed my site survey and the best location for the dish will be (insert mounting location). This will give you the best possible reception which should prevent programming interruptions. (Continue with details of installation plan). After I complete my installation, I will sit down with you to review the excellent features and benefits of your new DISH Network system. Any questions before I begin?"

### 6. Customer Education

- Advise customer the installation is complete
  - "Mr./Ms. (insert customer's last name), I have completed the installation and activated the receivers and I would like to show you the features and benefits of your new DISH Network system. Here is the remote control and the Quick Reference Guide that I will be referring to during our time together. I will help you navigate through your system. Any questions before we begin?"

- Ask customer questions throughout the education process to ensure comprehension
  - *“Does this make sense?”*
  - *“Any questions so far?”*
- 7. Departure
  - Verify customer does not have any lingering questions
    - *“What questions can I answer for you before I leave?”*
  - Direct customer to resources for future questions
    - *“If you think of any additional questions, you can refer to your QRG, Channel 101 and [www.dishnetwork.com](http://www.dishnetwork.com) to answer any additional questions you may have.”*
  - Extend final appreciation to the customer
    - *“Mr./Ms. (insert last name) thank you for joining the DISH Network family. Have a nice day.”*



Discuss why the scripts are important.

Brainstorm: why using the scripts is important for the customer experience. Record participant answers on a flipchart or board.

Possible answers include:

- Help communicate the same message
- Makes sure we don't forget to tell the customer the information
- Helps make the customer feel important, that we are communicating



Determine the main speaking points for each script on the Determining the Main Speaking Points Worksheet.

In the scripts, underline the main points and on the side, write the main topics to use for each step of the process.

Apply the scripts to the customer interaction process.



## Using Scripts Role play

### Instructions

Role play: Join your FSM and as a team run through the customer interaction process using the scripts that were given. The FSM will assess your performance on these skills. The FSM will complete a Performance Based Assessment to provide you feedback.

### Participant Summary

Ask someone to summarize the instructions, or a few people to summarize a different detail to make sure they understand the activity.

### **Trainer Recap**

The instructor should remind the class of any critical aspects of the instructions once more before they begin.

### **Circulate**

The instructor should move around as the class completes the activity. Include instructions specific to the activity. Examples: remind them of timeframes, make sure they are using the right scanner setting, answer questions, etc.

### **Debrief**

This should include discussion points and specific questions to debrief the activity.

- How will this help you on the job?
- How does using scripts improve the overall customer experience?



Class activity: Read customer or process cues and participants will respond with the correct script. The script should not be read so some ad-libbing is okay. The participant should hit all of the main points. Other participants can assist if they are stuck.

1. "Hello, please come in."
2. Call customer to provide status on arrival time
3. Perform site survey
4. "So are we all done?"
5. Advise customer the installation is complete



## **Review Scripts for Customer Interactions**

Begin with the usual open-ended, *"What questions do you have?"*

If questions are minimal, ask learners questions from the participant guide intro and review sections.

# facilitator / participant



## The Customer Interaction Process

By the end of this section, you should be able to:

- Construct a response for each section of the customer interaction process.
- Identify when to use each script.
- Apply the scripts to the customer interaction process
- Discuss why the scripts are important.



## Determining the Main Speaking Points

Read the scripts. Underline the main points of each script and then list the topics to cover for each section on the right.

<p>Call-Ahead Script</p> <p><i>Hello, this is (your name) with Dish Network. Is Mr./Ms. _____ available? I'm calling to let you know that I am <u>your DISH Network Technician</u> and I plan to <u>arrive in (ETA) minutes</u>. Will you be available when I arrive? I would like to remind you to <u>secure any pets</u>, make sure someone <u>18 years or older</u> is home during the installation, and please make sure the TV you want service on is there, <u>turned on and moved away from the wall</u>. Thank you and again, I will be there in about (ETA) minutes.</i></p>	<p><b>Main Points</b></p> <p><u>Identify self and Dish Network</u></p> <p><u>Arrival Time</u></p> <p><u>Pets</u></p> <p><u>Age requirement</u></p> <p><u>TV moved from wall</u></p>
<p>Voice Mail/Answering Machine Script</p> <p><i>Hello, this message is for Mr./Ms. _____. This is (your name) with Dish Network calling to let you know</i></p>	<p><b>Main Points</b></p> <p><u>Identify self and Dish</u></p>

<p>that I am your <u>DISH Network Technician</u> and I am heading in your direction. I plan on <u>arriving in (ETA) minutes</u>. The current <u>time is (xx:xx am/pm)</u>. I also want to remind you to secure any pets that you may have, and please make sure that someone who <u>is 18 years or older</u>, is home during the installation. If you need to contact us, please call <u>1-800 333-3474</u>. Thank you and again, I will be there in (ETA).</p>	<p><u>Network</u> _____.</p> <p><u>Arrival Time</u> _____.</p> <p><u>Age requirement</u> _____.</p> <p><u>I am enroute</u> _____.</p> <p><u>Contact information</u> _____.</p>
<p>Next-In-Line Script</p> <p>Hello, this is <u>(your name) with Dish Network</u>. Is Mr./Ms. _____ available? I'm calling to let you know that I plan to <u>arrive between (xx:xx) and (xx:xx)</u>. Will you be <u>available when I arrive?</u> I would like to remind you that someone who is <u>18 years or older is required to be home during the installation</u>. Thank you and I will call again when <u>I am enroute to your home</u>.</p>	<p><b>Main Points</b></p> <p><u>Identify self and Dish Network</u> _____.</p> <p><u>Arrival Time</u> _____.</p> <p><u>Age requirement</u> _____.</p> <p><u>I am enroute</u> _____.</p>
<p>Greet the customer</p> <p>"Hello, <u>I am (insert name) with DISH Network</u> and are you Mr./Ms. _____. First of all, <u>thank you for choosing DISH Network</u>. I will be setting you up with <u>(work order type) with our (programming package, plus HD if applicable)</u>. I am going to start by conducting a <u>survey of your home to ensure I can find the best location for the dish and where the receiver(s) will be located</u>. <u>May I come in so you can show me where your TVs are located?</u>"</p>	<p><b>Main Points</b></p> <p><u>Identify self and Dish Network</u> _____.</p> <p><u>Thank them for their business</u> _____.</p> <p><u>Identify Work Order and programming</u> _____.</p> <p><u>Site Survey</u> _____.</p> <p><u>Ask to come in</u> _____.</p>
<p>Review site survey with customer</p> <p>"I have completed my site survey and the <u>best location for</u></p>	<p><b>Main Points</b></p>

<p><i>the dish will be (insert mounting location). This will give you the <u>best possible reception</u> which should prevent programming interruptions. (Continue with details of <u>installation plan</u>). After I complete my installation, I will sit down with you to review the <u>excellent features and benefits</u> of your new DISH Network system. Any questions before I begin?"</i></p>	<p><u>Best location for the dish</u></p> <p><u>Best possible reception</u></p> <p><u>Installation plan</u></p> <p><u>Excellent features and benefits</u></p>
<p>Customer Education</p> <p>Advise customer the installation is complete  <i>"Mr./Ms (insert customer's last name), <u>I have completed the installation and activated the receivers and I would like to show you the features and benefits</u> of your new DISH Network system. Here is the remote control and the <u>Quick Reference Guide</u> that I will be referring to during our time together. I will help you navigate through your system. <u>Any questions</u> before we begin?"</i></p> <p>Ask customer questions throughout the education process to ensure comprehension  <i>"Does this make sense?"</i>  <i>"Any questions so far?"</i></p>	<p><b>Main Points</b></p> <p><u>Completed the installation</u></p> <p><u>Features and benefits</u></p> <p><u>Quick Reference Guide</u></p> <p><u>Any questions?</u></p>
<p>Departure</p> <p>Verify customer does not have any lingering questions  <i>"What <u>questions</u> can I answer for you before I leave?"</i></p> <p>Direct customer to resources for future questions  <i>"If you think of any additional questions, you can refer to your <u>QRG, Channel 101 and <a href="http://www.dishnetwork.com">www.dishnetwork.com</a></u> to answer any additional questions you may have."</i></p> <p>Extend final appreciation to the customer  <i>"Mr./Ms (insert last name) <u>thank you for joining the DISH Network family.</u> Have a nice day."</i></p>	<p><b>Main Points</b></p> <p><u>Any questions?</u></p> <p><u>QRG,</u>  <u>Channel 101</u>  <u><a href="http://www.dishnetwork.com">www.dishnetwork.com</a></u></p> <p><u>Thank you for joining the DISH Network family.</u></p>



## Customer Interaction Process Performance Based Assessment Evaluation Form

### Pre-Work

- Arrive in the proper uniform
- Review route and work orders
- "Do I have everything I need?"

### Prior to Arrival

- Call customer to provide status on arrival time

#### ***Call-Ahead Script***

*Hello, this is (your name) with Dish Network. Is Mr/Ms. \_\_\_\_\_ available? I'm calling to let you know that I am your DISH Network Technician and I plan to arrive in (ETA) minutes. Will you be available when I arrive? I would like to remind you to secure any pets, make sure someone 18 years or older is home during the installation, and please make sure the TV you want service on is there, turned on and moved away from the wall. Thank you and again, I will be there in about (ETA) minutes.*

#### ***Voice Mail/Answering Machine Script***

*Hello, this message is for Mr./Ms. \_\_\_\_\_. This is (your name) with Dish Network calling to let you know that I am your DISH Network Technician and I am heading in your direction. I plan on arriving in (ETA) minutes. The current time is (xx:xx am/pm). I also want to remind you to secure any pets that you may have, and please make sure that someone who is 18 years or older, is home during the installation. If you need to contact us, please call 1-800 333-3474. Thank you and again, I will be there in (ETA).*

#### ***Next-In-Line Script***

*Hello, this is (your name) with Dish Network. Is Mr./Ms. \_\_\_\_\_ available? I'm calling to let you know that I plan to arrive between (xx:xx) and (xx:xx). Will you be available when I arrive? I would like to remind you that someone who is 18 years or*



*older is required to be home during the installation. Thank you and I will call again when I am enroute to your home.*

#### Arrival/Meet and Greet

- Double check work order, verify at correct address
- Notify dispatch of arrival time
- Place cones correctly, take clipboard with work order to the door
- Greet the customer:  
*“Hello, I am (insert name) with DISH Network and are you Mr/Mrs. \_\_\_\_\_. First of all, thank you for choosing DISH Network. I will be setting you up with (work order type) with our (programming package, plus HD if applicable). I am going to start by conducting a survey of your home to ensure I can find the best location for the dish and where the receiver(s) will be located. May I come in so you can show me where your TVs are located?”*
- Verify all pets are restrained
- Verify appropriate receiver for the viewing requirements for this customer

#### Site Survey/Installation

- Perform site survey; create installation plan
- Review site survey with customer; SHOW customer main points of installation plan (i.e. mounting location, cable run, penetrations, etc.)  
*“I have completed my site survey and the best location for the dish will be (insert mounting location). This will give you the best possible reception which should prevent programming interruptions. (Continue with details of installation plan). After I complete my installation, I will sit down with you to review the excellent features and benefits of your new DISH Network system. Any questions before I begin?”*
- Follow CQI throughout site survey and installation**

#### Customer Education

- Advise customer the installation is complete  
*“Mr/Mrs (insert customer’s last name), I have completed the installation and activated the receivers and I would like to show you the features and benefits of your new DISH Network system. Here is the remote control and the Quick Reference Guide that I will be referring to during our time together. I will help you navigate through your system. This Quick Reference Guide will help you*

*explain the features of the system to others in the house. Any questions before we begin?"*

- Ask customer questions throughout the education process to ensure comprehension
  - "Does this make sense?"*
  - "Any questions so far?"*
- Follow CQCE throughout the Customer Education process**
- Discuss customer's 1<sup>st</sup> bill

#### Departure

- Verify customer does not have any lingering questions
  - "What questions can I answer for you before I leave?"*
- Direct customer to resources for future questions
  - "If you think of any additional questions, you can refer to your QRG, Channel 101 and [www.dishnetwork.com](http://www.dishnetwork.com) to answer any additional questions you may have."*
- Extend final appreciation to the customer
  - "Mr/Mrs (insert last name) thank you for joining the DISH Network family. Have a nice day."*

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FSM

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LSC



## Review the Customer Interaction Process

- What should you say when greeting the customer?
- What are questions you can ask the customer when you are educating them?
- How does using scripts improve the overall customer experience?



## Focus on the Fundamentals Closing

### Reinforce Content

- How will you remember all the steps of the customer interaction process?
- Name 5 steps of the customer interaction process.
- What step comes first, Call customer to provide status on arrival time, Perform site survey, Arrive in the proper uniform(\*)?
- What should you say when greeting the customer?
- What are questions you can ask the customer when you are educating them?
- Poll the class to see if they have accomplished the goal
- Address any lingering question

### Reinforce Value

Audience reflection: Allow 3 minutes for the class to answer the following questions:

- *"How will this help you on the job?"*
- *"What did you learn that was useful?"*
- How does using scripts improve the overall customer experience?
- How does improving the customer experience help you?

## facilitator / participant



### Focus on the Fundamentals Closing

Ask any questions you may have. Write down items to ask after class if necessary.

- How will you remember all the steps of the customer interaction process?
- Name 5 steps of the customer interaction process.
- What step comes first, Call customer to provide status on arrival time, Perform site survey, Arrive in the proper uniform(\*)?
- What should you say when greeting the customer?
- What are questions you can ask the customer when you are educating them?
- How will this help you on the job?
- What did you learn that was useful?
- How does using scripts improve the overall customer experience?
- How does improving the customer experience help you?