



The

4

PHONE TECHNIQUES

TOP TRUCKING DEALERS USE

To Build Their Business & Capture More Revenue

**FREE
CHECKLIST
PAGE 6!**

Ask any dealer: Most days, the phone is viewed as a headache rather than potential revenue waiting to be captured. That's unfortunate, especially when marketing teams are spending time and money to drive quality traffic to your websites for sales, service, and parts calls.

Top trucking dealers leverage a simple, yet effective acronym to do more with their existing phone leads and ensure every caller has the best possible phone experience. This methodology known as "CRISP" guides callers to an optimal call outcome and keeps teams focused on the phone metrics that drive results for your bottom line.

CRISP stands for Connect, Request & Invite, Set, and Pursue.

CONNECT

BEST PRACTICES

con•nect / verb / Get your callers connected quickly to someone who can help.

Connecting calls is the first step toward bringing in new, valuable customers to your store. However, statistics show 39% of callers never reach someone who can help them book an appointment, order a part, or help with a truck.

PROPERLY STAFF THE PHONES

The road to improvement starts when you properly staff and schedule your Sales and Service teams. That way, there's always someone available to pick up the phone. In spite of that, even when you have enough people, conflicting schedules or a lack of process can cause calls to slip through the cracks. If half the team is out in the field, you won't have enough folks in the office to take all your calls. *To ensure every call is answered, rotate your teams' lunch and break times so someone is always able to answer the phone.*

CONVERSATION QUALITY

Your number one focus when boosting connection rates? Ensuring callers reach someone who is qualified to help them. An answered call is not considered "connected" if the caller never reaches someone who can address his or her needs. If a customer is interested in purchasing a truck, he or she needs to speak with someone who knows the product. A receptionist who answers the call isn't going to sell your customer a truck — that call needs to be transferred to the right Sales agent.

The same thing goes for someone getting put on hold. How often are your callers hanging up before even speaking to someone who can help them? The average caller placed on hold hangs up after only around 30 seconds of waiting. *Make certain your most qualified people are available to take those calls, and take them quickly!*

WARM TRANSFER

If you called my phone and I just let it go to voicemail, did I answer your call? Of course not. You don't need to be a phone expert to know that. Unfortunately, this exact scenario happens every day with customers calling trucking dealers.

Using a warm transfer procedure eliminates a receptionist-forced forward — every caller's worst nightmare. A warm transfer is where the receptionist first checks to see if the caller's intended party is available to help before blindly transferring the caller over. If the intended party is not available, the receptionist does everything possible to help the caller or escalates the call to a manager. As a last resort, the receptionist takes a live message and sets expectations for a return call. *Make sure no customer gets sent to voicemail unless specifically requested.*

PHONE BRIDGE

Another way to boost connectivity rates is to use a phone bridge (also called an IVR or phone tree) — the friendly greeting that says "Press 1 for Service, 2 for Parts, 3 for Sales, or 0 for the operator." A bridge helps route each call to the correct person before anyone even answers the phone. Implementing a bridge reduces bottlenecks in reception caused by high call volume, reduces the risk of long hold times and transfers, and provides a good shopper experience by getting callers to the right department quickly and efficiently. *Leverage a phone bridge to get folks where they need to go as quickly as possible.*

REQUEST & INVITE

BEST PRACTICES

re•quest / *verb* / Request the appointment and invite qualified callers into the store.

Your team is doing a great job connecting calls. You've got interested prospects and your conversations are smooth. You feel like your agents are prioritizing the phone, and it shows in how many calls you're connecting each day.

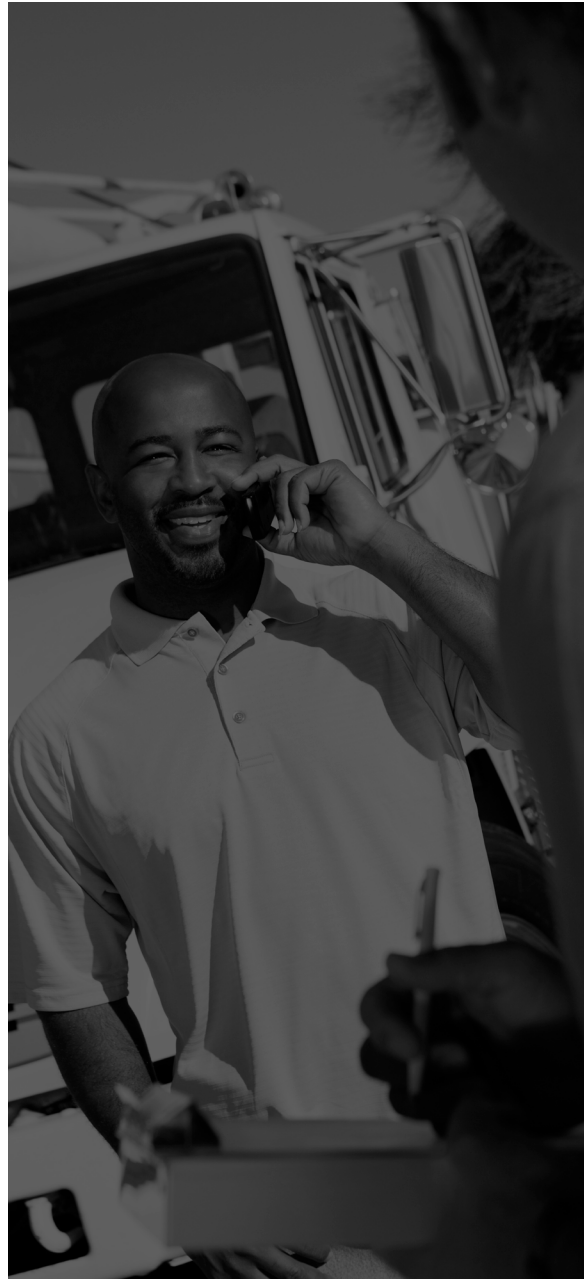
But for whatever reason, you don't see a boost in new sales or appointments. What's the deal? Surely these people are interested, so where is everyone?

That's where Request and Invite come into play. Calls with a prospect should more often than not result in an appointment request, especially after your agent has qualified the caller. If a prospect is calling you, he or she is interested in potentially buying a truck or getting their truck repaired. Or maybe they just need a part.

Regardless of whether you think callers will choose your store, give each one the option to come in and see what you have to offer. Take time to listen to your prospect's questions, comments, and concerns when he or she calls you and suggest an appointment. If the caller says no, you've at least given yourself a chance.

Yet the worst thing your agents can do is not even ask. You can't read your prospects' minds, and you have to do the work to bring them in. Phone handlers might say something like this:

"We'd love to have you come by to look at the truck / have one of our certified techs take a look at the truck. Are you available today or tomorrow?"



SET

BEST PRACTICES

set / *verb* / Agree on a specific date and time, and immediately confirm with a reminder.

You're connecting calls and inviting prospects/customers in for an appointment. Great! But here's the tricky part about actually bringing in more people: effectively getting those appointments scheduled. Everyone is busy, including you! But research shows that in Service, you have better retention and a higher RO average when you operate on an appointment basis. In Sales, customers are three times as likely to show up for a store visit when you schedule a firm appointment time.

When your prospects and customers call in, they want to feel confident their needs will be met. With that being said, this entails you first reaching out about setting a specific appointment time. Don't let the prospect ask first. Your goal here is to go for "firm appointments," which are when a prospect confirms a specific date and time to come in for an appointment. Avoid "soft appointments," which are when a prospect agrees to come in, but doesn't specify when or responds vaguely with a time, such as "I may swing by sometime this weekend."

To get those firm acceptances, provide some options. When inviting prospects and customers into your store, offer at least two different dates and times. Offering two options

makes your folks feel as though they've already agreed to the appointment and will naturally choose between the two. For example:

"Are you available to come in on Wednesday or Friday?"

"Would a morning or afternoon appointment be better for you?"

"I have time at 3 p.m. and 4:30 p.m. on Friday. Which one is better for you?"

Get those specific times written down and remind your prospects and customers of their appointments in an email confirmation immediately after hanging up. Doing so leaves less room for surprise cancellations or forgetfulness on either side.



PURSUE

BEST PRACTICES

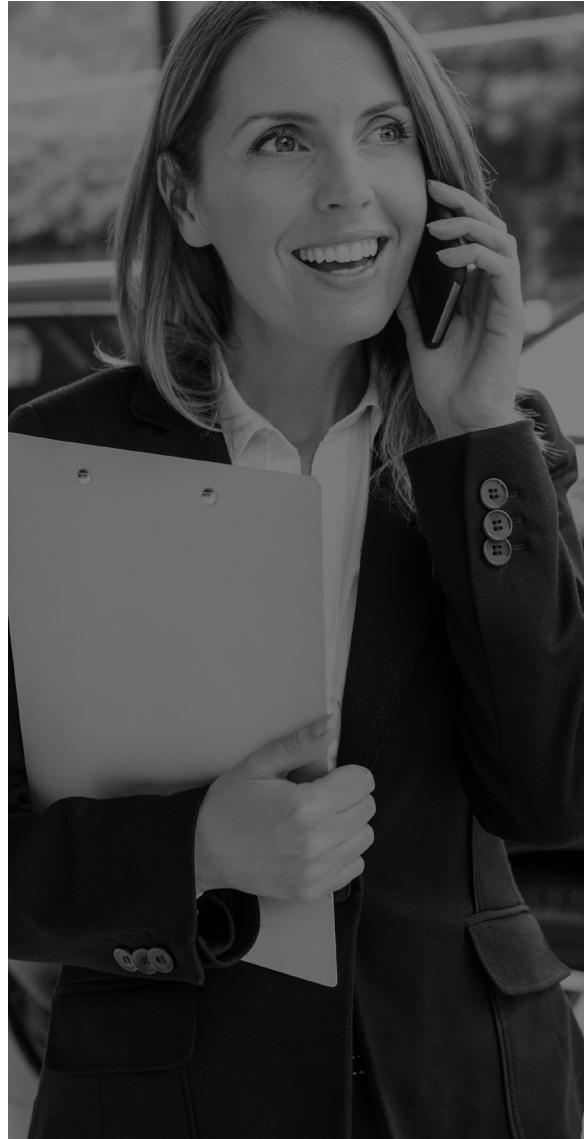
pur•sue / verb / Reach out to customers and new leads, and save missed opportunities.

Pursuing stranded callers who never spoke with anyone on your team is only half the battle in trucking. Even worse is when a prospect called in interested in purchasing, spoke to someone, yet left the call without an invitation into the store.

But good news! Not all hope is lost in this situation. Have someone call the prospect back as soon as possible; this shows some great initiative on your side and proves to prospects you're interested in their business. Have your Sales agents let them know you'd love to invite them in for a visit based on your last conversation. You can even pull in an admin for help.

The same goes for missed calls. If you received a call from a prospect – especially if this prospect left a voicemail – pursue that opportunity. Leaving a voicemail is sure proof that the prospect or customer is interested in you. Don't leave him or her hanging. Return the call as soon as possible and apologize for missing the call. Handle the call the way you usually would and don't forget to request that appointment.

Sometimes you'll get calls from prospects who are wishy-washy about coming in for a visit. Try to secure an appointment with a follow-up call about confirming a specific appointment date and time. If a prospect agreed to think about a visit – but never called back – pursue that caller. Your prospects may forget to call back, but your team shouldn't.



CRISP CHECKLIST

C

CONNECT

- ☐ Ensure every caller connects with someone who can address his or her needs.
- ☐ Stagger staff's lunch and break times so someone is always available to answer the phone.
- ☐ Implement a warm transfer process to avoid sending the customer to voicemail unless specifically requested.
- ☐ Utilize a bridge to quickly route callers to the correct department before anyone even answers the phone.

S

SET

- ☐ Avoid soft appointments. Ex. "I may swing by sometime this weekend."
- ☐ Offer at least two different dates and times.
- ☐ Remind the caller of the appointment with an email or text confirmation immediately after hanging up.
- ☐ Improve show rate with a firm appointment for a specific date and time. Ex. "I have time at 3 p.m. and 4p.m. on Friday. Which one is better for you?"

*A firm appointment is
3x more likely to show!*

RI

REQUEST AND INVITE

- ☐ Every single Sales opportunity with a prospect should result in an appointment request.
- ☐ Every Service/Parts customer should be invited into the store for an appointment with your team.
- ☐ Take time to address your prospect's questions, comments, and concerns when he or she calls you.

P

PURSUE

- ☐ If no appointment is set, a manager should call the prospect back as soon as possible and invite him or her in.
- ☐ Set time blocks for outbound calls including appointment confirmations, no-shows, and prospecting calls.
- ☐ Return all missed calls, especially those who left a voicemail, as soon as possible and address the caller's questions.

READY TO LEARN MORE?

Visit callbox.com/trucking or call us at 833-701-1358 for additional resources and to learn more about how Call Box is helping trucking dealers Own the Phone.



OWN THE PHONE

Managing the phones shouldn't be complicated or time-consuming. Call Box leverages human reviews, artificial intelligence, and CRISP metrics to equip Sales, Service, and Parts departments with everything they need to Own The Phone.

100% OF INBOUND/OUTBOUND SALES, SERVICE, AND PARTS CALLS REVIEWED AND CATEGORIZED

MEASURE PHONE PERFORMANCE WITH SIMPLE, EFFECTIVE METRICS

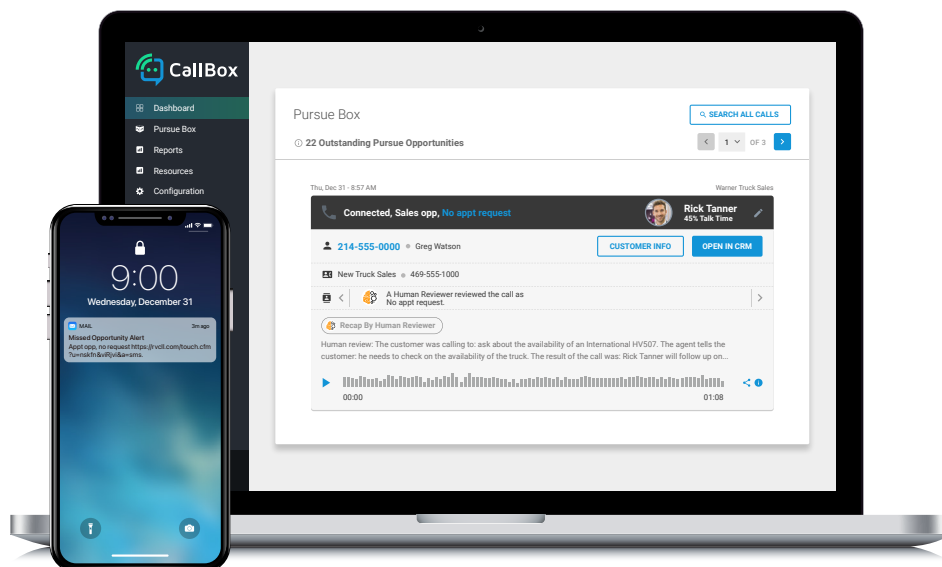
Simple is best. Our CRISP metrics help you track and train to deliver a best-in-class phone experience, and proactively make adjustments that drive measurable improvement on the phone.

DO MORE WITH EXISTING SALES, SERVICE, & PARTS OPPORTUNITIES

Alert managers quickly if a call is mishandled and requires follow-up attention. Click to call tracked via CRM integration and transparent outbound reporting allows you to pursue your best leads with true accountability.

PREVENT CALLS FROM SLIPPING THROUGH THE CRACKS

Seamless integrations with top CRMs, agent voice recognition, and integrated click to call means leads are logged in CRM automatically and phone lead management takes less time out of your day.



READY TO OWN YOUR PHONES?

callbox.com/trucking | 833-701-1358