Inbound call, local move

Script 1 of 4

Same order every time. Words in [brackets] are for you to fill in or follow, not to read out.

OPEN	Thank you for calling [Company], this is [Your name]. How can I help? Who am I speaking with? Thanks, [Name]. I'll ask a few quick questions so I can get you a price. Is that okay?
ZIP CODES	What ZIP code are you moving from? And where are you moving to?
HOME AND ACCESS	Is the place you're leaving a house, an apartment, or a storage unit? And the new place? *At each end. Apartment: floor, elevator. House: stairs, inside or up to the door. Storage: size of the unit. Always: distance from the door to where a truck can park.*
BEDROOMS	How many bedrooms? **3 OR MORE: DO NOT QUOTE. BOOK THE SURVEY.** For a home that size, I'm not going to guess a price over the phone. I'd rather look at everything with you once, and give you the price in writing. We can do a video call from your phone, or I can send an estimator. Which is easier? *Set the day and time. Spell the name. Get the email. Send the confirmation now.*
DATE AND STORAGE	What date are you looking at? Is it fixed, or is there some room? Is everything going straight to the new place, or do you need storage in between?
HOW THE PRICE WORKS	FLAT PRICE You get one price for everything on your list. Same list, same price. HOURLY RATE It's [rate] an hour for [number] movers and the truck, with a [number] hour minimum. The list tells me how long the job should take.
ROOM BY ROOM	Let's go room by room. Start with the living room. What's in there? *After each room: anything else, anything on the walls? Then closets, balcony, garage, basement. Then heavy or fragile: piano, safe, glass, large TV.*
BOXES	For a home this size, people usually end up with around [number] boxes. Does that sound right, or would you say more?
PACKING	There are three ways to do it. We pack everything. We pack only the hard things, like TVs, artwork, and mirrors. Or you pack it all yourself. Which fits you best?
THE PRICE	FLAT PRICE For everything on this list, with [packing option], your price is [price]. HOURLY RATE For this list, with [packing option], I'd plan for about [number] hours, which comes to about [amount]. You pay for the time the job takes. That covers [what is included: movers, truck, travel, blankets and wrapping, beds taken apart and put back together]. *Anything charged on top, such as travel time: say it now.* If anything changes on the day, we tell you what it costs before the extra work, not after.
SCHEDULE AND DISCOUNT	*Say what the schedule shows for that date. Nothing else.* If you book today, there's a [X]% same-day booking discount, which brings it to [new price or new rate]. It saves us the follow-up calls, so we pass that on to you.
DEPOSIT	NO DEPOSIT There's no deposit. You pay [when your company collects payment]. DEPOSIT To hold the date we take [amount], and it comes off your total. *Say your cancellation terms.*
THE ASK	**Shall I book that for you?** *Then stop talking.*
YES	You're booked for [date], arriving between [time] and [time]. Can you spell your full name? And the best email? What address are we picking up from, and delivering to? Is this the best number for move day? [Customer service name] will call to introduce themselves.
NOT TODAY	No problem. I'm emailing the estimate right now. Can you spell your full name, so it's right on the estimate? Take a look, and tell me if we missed anything.

The 5-minute call back to a web lead

Script 2 of 4

Someone filled in your quote form. A person calls within 5 minutes, with the request open in front of them.

Call first. No automatic text. No message saying someone will be in touch.	**Confirm, do not ask again.** They typed it once. Read it back to them.	**No answer?** Voicemail, then email, then call again today. Text last.

OPEN	Hi, is this [Name]? This is [Your name] from [Company]. You asked for a moving quote on our website a few minutes ago, so I'm calling to get you a price. Is now a good time? *Lead from a lead provider: "You asked for moving quotes online a few minutes ago, and we're one of the movers in your area."*
BAD TIME	No problem. I'll try you again.
CONFIRM	I have your request in front of me, so I'll just confirm it. You're moving from [ZIP] to [ZIP], around [date], and it's a [number] bedroom [home type]. Did I get that right?
THEN	*Carry on with Script 1 from "Home and access". Same bedroom rule, same price lines, same ask.*
VOICEMAIL	Hi [Name], this is [Your name] from [Company]. You asked for a moving quote a few minutes ago, so I'm calling to get you a price. I'd like to go through your list with you. It takes about [X] minutes. My direct number is [number]. That's [number]. I'm also sending you a short email now, so you can reply there if that's easier. Talk soon.
TEXT, ONLY AFTER NO ANSWER	Hi [Name], it's [Your name] from [Company]. I tried calling about the moving quote you asked for. Is there a better time to reach you, or is text or email easier?

When they hesitate, on any call

THEY SAY	YOU SAY
Too expensive	Can I ask what you're comparing it to? If it's another quote: is theirs a flat price or an hourly rate, and is it for the same list? If it's the budget: you can pack your own boxes or move fewer things. What I can't do is take money off for no reason. If I could, the first price wasn't real.
I need to talk to my spouse	Of course. I'll email the estimate now, so you're both looking at the same list and the same price. Should I send it to both of you?
I'm getting other quotes	You should. When you compare, check four things. Is the price flat or hourly? Is it for the same list? Is there a deposit, and do you get it back? Is there a fee for paying by card? I'm sending ours now, so you have it next to the others.
I need to think about it	Sure. So I send you the right information: is it the price, the date, or something about us? I'll send the estimate now. If the answer is no, just tell me. That's fine too.

Long distance call

Script 3 of 4

The opening is Script 1. Three things change: how you explain the price, the survey, and the delivery.

OPEN AND BASICS	*As in Script 1: ZIP codes, home type, access at both ends, bedrooms, date, storage.*
HOW THE PRICE WORKS	Here's how the price works on a long distance move. It's based on what you're moving, how far it's going, and how much packing you want. You get it in writing before you decide anything. *Say how you set it: one fixed price for the list, or an estimate by weight or by volume.*
3 BEDROOMS OR MORE: DO NOT QUOTE	For a home that size, I'd rather see it than guess. We can do a video call from your phone, or I can send an estimator. Which is easier? *Book the survey. The price comes after it.*
UNDER 3 BEDROOMS	Let's go through your list now, room by room, starting with the living room. *Inventory, boxes, and packing as in Script 1.*
THE PRICE	For this list, with [packing option], your price is [price]. That covers [what is included]. *If your price is an estimate that follows the final weight or volume, say so here, in plain words.*
DELIVERY	Pickup would be on [date]. Delivery takes between [X] and [Y] days, counted from [pickup day, or the first day you can receive it: use the one your company goes by]. If you can't be there, someone you trust can receive it for you. If nobody can, we can hold it in storage, and I'll put that price on the estimate so it isn't a surprise later.
CUTOFF, ONLY IF IT IS REAL	We need long distance moves booked at least [X] days before pickup, so the latest you can decide is [date].
VIDEO WALKTHROUGH	Before I put the price in writing, I do a short video walkthrough with you, so the list I price is the list we load. It takes a few minutes on your phone. Can we do it now, or is [time] better? *Later: "I'll call you at [time] for the walkthrough, and email your written estimate as soon as we finish."* *After the walkthrough: spell the name, get the email, send the written estimate.*
THE ASK, AFTER THE WRITTEN ESTIMATE	*First say your deposit terms, as in Script 1.* **Shall I book it?** *Then stop talking.*
NOT TODAY	No problem. Take a look at the written estimate, and tell me if we missed anything.

Moves that cross state lines. The estimate must be in writing and based on a physical survey of the goods (49 CFR 375.401). A survey can be on site or by video, live or recorded (49 CFR 375.103). The customer can waive it, but only in writing, signed before loading. So the number you say on the phone is not the estimate. The written one is. Moves inside one state follow that state's rules, which vary.

Follow-up and customer service calls

Script 4 of 4

Follow up the same day or the next. Never agree a time for the call, and never say you will call later today. Send an email after every call. After the booking, customer service takes over.

1 Sales: the follow-up call

FOLLOW-UP CALL	Hi [Name], it's [Your name] from [Company]. We spoke [earlier today, or yesterday] about your move on [date]. I'm calling to make sure the estimate reached you. Does everything on the list look right? Anything to add or take off? *Ready: "Shall I book [date] for you?" Same day as the quote: "The same-day discount still applies until we close today."* *Not yet: "No problem. I have my notes, so you won't have to repeat anything." Do not set a time for the next call.*
VOICEMAIL	Hi [Name], it's [Your name] from [Company]. I sent your moving estimate [earlier today, or yesterday] and wanted to make sure it arrived. If anything on the list looks off, call me at [number] or reply to the email, and I'll fix it. That's [number].
EMAIL, AFTER EVERY CALL	*Plain text, two short paragraphs: what you sent and what the price covers. End with one question.*

2 Customer service: after the booking

WELCOME CALL, RIGHT AFTER BOOKING	Hi [Name], this is [Your name] from [Company]. Is now a good time? I'll be brief. I'm the person looking after your move from now until it's finished. If you have a question, you call me. I have you down for [date], arriving between [time] and [time], from [address] to [address]. Is that still right? Has anything changed on your list since you spoke with [sales rep]? The day before the move, you get a text reminder. You don't need to answer it. On move day, your crew lead calls when they're on the way. My direct number is [number].
REMINDER TEXT, THE DAY BEFORE	Hi [Name], this is [Company]. A reminder that your move is tomorrow, [date]. Your crew arrives between [time] and [time], and your crew lead will call when they are on the way. No need to reply. If anything has changed, call us at [number].
CREW LEAD, ON THE WAY	Hi [Name], this is [Crew lead name], your crew lead from [Company]. We're on our way and should be at your door around [time]. Is there anything we should know about parking or the elevator?
OFFICE CHECK-IN, MID-MOVE	Hi [Name], it's [Your name] from the office at [Company]. Nothing is wrong. I'm calling to ask how the move is going so far. Is there anything you'd like me to pass on to the crew lead? *A problem: "Thank you for telling me. I'm calling [crew lead name] right now, and I'll call you back in [X] minutes."*
THE DAY AFTER	*No call. An automatic review request goes to every customer, the same words and the same link for everyone, with up to two reminders.*