



Happy Check Call SOP

Department: Call Center

1. Purpose

To ensure customers are satisfied with their recent service, identify opportunities for improvement, and reinforce Cal's Plumbing's commitment to professional, high-quality work.

2. Scope

This SOP applies to **every completed service or estimate**. A Happy Check must be attempted **on the same day** the technician leaves the job site. Calls should be placed **15–20 minutes after completion** to allow the customer time to process the visit.

3. Responsibilities

Call Center Employees:

- Each CSR is responsible for performing Happy Checks for **their assigned technicians' jobs**.
- CSRs must:
 - Use the script provided
 - Ask **2 relevant follow-up questions**
 - Record the **rating, question numbers, and answers**
 - Escalate issues when needed

Call Center Manager:

- Oversees process consistency and reviews follow-up actions for customer satisfaction concerns



4. Procedure

4.1 Preparation

- **Review the job file:** Know which technician performed the job and the service provided
- **Use the script below** for consistency
- **Maintain a positive, friendly, and professional tone**

4.2 Call Script & Rating

Step 1: Introduction

"Hello Mr./Mrs. [Customer's Last Name], this is [Your Name] with Cal's Plumbing. I'm calling about [Tech's Name]'s visit to your home [today/yesterday]. I'd like to ask a quick question if you have a minute."

Step 2: Ask for Rating

"On a scale of 1 to 10, with 10 being amazing, how would you rate the level of service on our recent visit?"

Step 3: Based on the customer's rating, proceed to the appropriate section below.

5. Follow-Up Question Bank

*Ask any 2 of the following questions based on the conversation. Record the **question numbers** and **customer's answers** in the CSR Scorecard.*

1. Did the technician arrive in uniform and appear professional?
2. Did the technician walk through the issue with you before starting the work?
3. Did they explain your options and answer all your questions?



4. Was the job completed to your satisfaction?
5. Was the work area or home left clean and orderly?
6. Would you feel confident recommending us to a friend or neighbor?

6. Rating Response Guide

Red Zone (Rating 1–6)

"I'm really sorry to hear that was your experience. That's not like [Tech's Name] at all. I want to make sure your concern is addressed—what can we do to make this right in your eyes?"

- Ask 2 questions from the **Question Bank (Section 5)**
- Take notes and acknowledge the concern
- If 2 or more service points were missed → **Tag as "Happy Check – Action Required"**

Action:

- Complete the **Happy Call Action Required Form**
- Post in **Customer Resolution Chat**

Yellow Zone (Rating 7–8)

"I appreciate your feedback. What could we have done to make that rating 1 to 2 points higher?"

- Ask 2 questions from the **Question Bank (Section 5)**
- If 2 or more service points were missed → **Tag as "Happy Check – Action Required"**



Green Zone (Rating 9–10)

"Thank you for that vote of confidence, Mr./Mrs. [Last Name]. We love hearing this from customers like you."

"Is there any feedback you'd like me to pass on to the technician?"

If positive feedback is given:

"That's great! We hear that all the time about [Tech]. I'll be sure to pass that along—he really appreciates hearing from customers."

- Ask 2 questions from the **Question Bank (Section 5)**
- Reinforce the positive experience with a warm, friendly wrap-up

7. Documentation & Follow-Up

- **If voicemail is left:** Note and **pin it to the job page**
- **Log the Call:**
 - Customer rating
 - The **2 question numbers** asked
 - The **customer's answers**
- **If any dissatisfaction is noted:**
 - Complete the **Happy Call Action Required Form**
 - Post in **Customer Resolution Chat**

8. Guidelines

- Every completed job or estimate must receive a **Happy Check call the same day**
- CSRs are responsible for following up on **their assigned technician's jobs**
- Calls should feel natural, not scripted
- Always log your question numbers and responses for accountability and tracking

