



Incoming Call Script Template

The Incoming Call Script is designed to help your appointment setters say the right things to convert more of your inbound phone calls into set appointments. This script is available in MarketSharp as an “on-screen” script so you can enter lead data from within the script.

Feel free to use this template in your business... it’s on the next page. Simply highlight the text, copy, and then paste into your word processor.

This is just one of many templates in MarketSharp. The following home improvement specific templates are loaded into MarketSharp and ready to use.

- 117 postcard templates – jobsite marketing, home show invitations, home show follow-up, open house invitation, pre-appointment reminder, unsold lead follow up, thank you note, referral program, future interest, etc.
- 99 sales letter templates – i.e. jobsite marketing, home show invitations, home show follow-up, open house invitation, pre-appointment reminder, unsold lead follow up, thank you note, referral program, future interest, post job survey, lead paint documentation, lien waiver, collections, etc.
- 26 forms – lead sheet, measure sheet, closing sheet, company info, project summary, balance due, completion certificate, job cost, referral card, telemarketing release form, etc.
- 8 list report templates – phone call list, appointment list, lead paint audit, customer list, etc.
- 46 email templates – newsletter, appointment reminder, upcoming home show, check out Houzz, event notices, open house, Home Advisor rating, annual inspection, past customer sale, testimonial request, referral solicitation, online review request, project completion thank you, post appointment thank you, etc.
- 27 report templates – lead cost, closing ratios, DNC audit, call center, canvasser performance, lead setter performance, telemarketer performance, promoter performance, confirmation performance, lead source summary, job cost, production, commission, demographics, install volume, payments, balance due, sales, product, service, etc.

Here’s the GOOD NEWS... MarketSharp can automate your marketing and grow your sales.

A 5-minute phone call is the best way to see if this is for real. You’ll see how over 3,200 other remodelers across the U.S. and Canada are using this system to grow their business.

**If you’d like to automate your marketing and grow your sales,
call 1-800-335-4254 ext. 1 for a 5-minute discovery session.**

Incoming Call Script Template

Thank you for calling <<Company.Name>>, my name is _____, how can I help you today?

Great, I can help with that. First, I just need some basic information to better serve you today. May I have your name please?

First Name:

Last Name:

In case we get disconnected, can I have the best phone number to reach you at?

Phone:

Thank you. May I have the Address for the home you want us to come and take a look at?

Street Address:

City:

State:

Zip:

Mr./Ms. <<Contact.Last_Name>>, what prompted you to call us today?

Product Interest:

Excellent, we can help you with that.

And how did you hear about us?

Primary and Secondary Lead Source:

Inquiry Taken By:

Mr./Mrs. <<Contact.Last_Name>>, what we like to do is evaluate your situation so we can provide what is best; both product and price.

First we need to see your home in order to tell how we can help. Of course, there's absolutely no charge for this visit or any of the ideas we'll share with you.

While we're there, we'll show you pictures, brochures, and a working sample of our products.

If you like what you see, we'll take some measurements, and give you a price. That way, you'll know exactly what your options are and what they'll cost.

Does that sound helpful?

Appointment Set By:

**If you'd like to automate your marketing and grow your sales,
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Let's select a date and time that is convenient for all. What time of day is best for you and (and your spouse), Morning, Afternoon, or Evening?

Use Calendar to book an appointment date and time:

I have an opening on the schedule on (day and time)! How would that work for you?

Great! I have you on the schedule for (appointment date and time).

I can send an email confirming your appointment date and time along with some information about our company. Can I have your email address please?

Email Address:

Ok, we look forward to meeting you on <<Appointment.Date>> at <<Appointment.Time>> at <<Contact.Address>> in <<Contact.City>>.

Do you have any questions for me?

Ok, thanks for calling <<Company.Name>>, have a wonderful day!

REBUTTALS TO COMMON OBJECTIONS

WANTS A ONE PARTY APPOINTMENT:

The reason we require both home owners be present is because we have thousands of options and can estimate your job at least 20 to 25 different ways. What we've found is, that if everyone's not present, then we may give you an inaccurate estimate based on the style that one of you decides on. Then, your spouse or family member may decide on another option, thus changing the price entirely. The last thing we want to do is give you a false quote. If everyone is present, we can figure out together exactly what you want, and give you an exact price to the penny what your investment would be.

WANTS A BALLPARK PRICE:

<<Company.Name>> has many product sizes and product lines and it is often misleading to quote a price over the phone. That is why we are simply not given this information. One of our product designers can come and take the specific measurements for your home and give you an accurate price with no obligation to you.

I AM NOT INTERESTED AT THIS TIME:

Well, I can certainly appreciate that, in fact most people are in the information gathering stage and our free, in-home consultation will assist you in that process. We can send out a representative who will show you all the options available for when it comes to time to do the work. Once you have chosen your options and we have done the measurements, we will put together a specific proposal for your project. There is no cost or obligation for this service and it will provide you with a figure so that you can fit the project into your future budget.

HOW LONG WILL THE APPOINTMENT TAKE:

Well it all depends on how many questions you both have. We have found that the appointment usually takes about 60 minutes, but again, it depends on how many questions you have.

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Incoming Call Script Template

Phone Script With Lead Entry

Search For Contact

Thank you for calling XYZ Remodeling, my name is _____, how can I help you today?

Great, I can help with that. First, I just need some basic information to better serve you today. May I have your name please?

First Name:

Last Name:

Are you the sole homeowner or is there a significant other? May I have his/her name?

In case we get disconnected, can I have the best phone number to reach you at?

Phone:

Thank you. May I have the Zip Code for the home you want us to come and take a look at?

Zip (wait for lookup to populate city and state):

City:

State:

May I have the street address of your home?

Street Address:

Phone Script With Lead Entry

Search For Contact

Contact
Ron Stone
525 Golf Course Rd
Forest City, IA 50436
Search Phone Number:
(608) 777-9999
Cell Phone:
1 (608) 777-9999

Mr./Ms. Stone, what prompted you to call us today?

Product Interest:

[Add Product Interest](#)

Excellent, we can help you with that.

And how did you hear about us?

Primary and Secondary Lead Source:

Lead Source Primary

Lead Source Secondary

Inquiry Taken By:

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Phone Script With Lead Entry

Search For Contact

Contact

Ron Stone
525 Golf Course Rd
Forest City, IA 50436
Search Phone Number:
(608) 777-9999
Cell Phone:
1 (608) 777-9999

Inquiry

Primary Lead Source: Newspaper
Secondary Lead Source: Tribune
Inquiry Taken By: Jason Oefstedahl

Product Interests

Windows - Double Hung

Appointment

Salesperson 1: Mary Smith
Appointment Date: Saturday, October 18,
2014 at 12:30 PM
Appointment Set By: Jason Oefstedahl

[Back To Inquiry](#)

Mr./Mrs. Stone, what we like to do is evaluate your situation so we can provide what is best; both product and price.

First we need to see your home in order to tell how we can help. Of course, there's absolutely no charge for this visit or any of the ideas we'll share with you.

While we're there, we'll show you pictures, brochures, and a working sample of our products.

If you like what you see, we'll take some measurements, and give you a price. That way, you'll know exactly what your options are and what they'll cost.

Does that sound helpful?

Appointment Set By:

Jason Oefstedahl ▼

Let's select a date and time that is convenient for all. What time of day is best for you and (and your spouse), Morning, Afternoon, or Evening?

Click to use the Slot Scheduler to book an appointment:

[View Slot Scheduler](#)

I have an opening on the schedule on (day and time)! How would that work for you?

Great! I have you on the schedule for (appointment date and time).

Click to use the Salesperson Calendar to book an appointment:

[View Calendar](#)

Salesperson 1:	Salesperson 2:	Date:	Time:	Appointment Type:
Mary Smith ▼	▼	10/18/2014	12:30 PM	▼

Now I can send an email confirming your appointment date and time along with some information about our company. Can I have your email address please?

Email Address:

Ron@email.com

REBUTTALS TO COMMON OBJECTIONS

WANTS A ONE PARTY APPOINTMENT:

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[Save and Confirm Appointment](#)

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Return to Script (Ron Stone) Scheduling sales appointment for Ron Stone

My Calendar | Sales Calendar | Production & Service Calendar Map to Schedule Appointment | Map to Assign Appointment(s)

Resource Groups: Salespeople Production Work Crews Service Other Employees Equipment Miscellaneous

October 2014 | Day | Week | Month | Year | Agenda | Timeline | Show work week | Show full week

Monday, October 13, 2014 - Saturday, October 18, 2014

Time	13 Monday	14 Tuesday	15 Wednesday	16 Thursday	17 Friday	18 Saturday				
9 AM	Sales Appo Products: Windows Contact: Dennis Neuberger 18516 Fir Av Clear Lake, IA 50436	Sales Appo Products: Roofing,W Contact: Lloyd Abrams Jr 212 S Indiana Av S Mason City, IA 50401	Dr Visit Products: Windows Contact: Tom & Nancy Abrams 426 S 7th St Forest City, IA 50436	Sales Appo Products: Windows, Gutters Contact: Dennis Ovenson 1514 Main Av Forest City, IA 50436	Vacation	Sales Appointment with Products: Windows Contact: Mike Tjaden 636 S 6th St Forest City, IA 50436 - 2028	Sales Appo Products: Bathroom Contact: David Ackerman 1 W River St Mason City, IA 50401	Sales Appo Products: Siding,Wir Contact: John Amundson 821 4th St SW Mason City, IA 50401	Sales Appointment with Products: Siding,Doors,Sunroom Contact: Kenneth Nichols 129 Fletcher Dr Clear Lake, IA 50428 - 1332	
10 AM										
11 AM										
12 PM										
1 PM	Sal	Sal	Sal	Sal	Sal	Sal				
2 PM		Sales A Product: Jerry Smith 105 Balken St NW Masor SE Forest City, IA 50436	Sales A Product: Siding Contact: John John 7th St 809 SE Forest City, IA 50436	Sales A Product: Windo Contact: Reece Adarme 11th St NE 808 SE Forest City, IA 50436	Sales Appo Products: Repair, Roofing Contact: Jerry Johnson 123 Main St Mason City, IA 50401	Sales Appo Products: Roofing Contact: Vince Zrostlik 1008 W I St Forest City, IA 50436	Sales Appo Products: Windows Contact: Kenneth Johnson 310 N Taft Av Mason City, IA 50401	Sales Appo Products: Sunroom Contact: Tommy Smith 1320 Oak Street Mason City, IA 50401	Sales Appo Products: Doors,Gut Contact: Beverly Stone 8th St SE 311 Mason City, IA 50401	
3 PM										
4 PM	Sales Appo Products: Windows Contact: Nancy Zehr 330 20th St SE Forest City, IA 50436	Sales Appo Products: Siding, Gutters Contact: Al Penfold Forest City, IA 50436	Sales A Product: Deck, Gutter Contact: Dan Bathric Cynthi Forest City, IA 50436	Ziemar Product: Siding Contact: Dan Ziemar 7250 Forest City, IA 50436	Sales A Product: Gutter Contact: Gordo Martei 15347 Forest City, IA 50436	Sales Appointment with Products: LeafGuard Contact: Roger Kenyon 114 Sunland Wy Forest City, IA 50436 - 2218	Sales Appo Products: Windows Contact: Gary Johnson 302 Forest City, IA 50436	Sales Appo Products: Windows,I Contact: Randy Folkerts 935 W J Forest City, IA 50436	Sales Appo Products: Windows Contact: David Jones 153 N Forest City, IA 50436	Sales Appo Products: Windows Contact: Deborah Patterson 1158 Forest City, IA 50436
5 PM										

Phone Script With Lead Entry

Search For Contact

Contact

Ron Stone
525 Golf Course Rd
Forest City, IA 50436
Search Phone Number:
(608) 777-9999
Cell Phone:
1 (608) 777-9999
Ron@email.com

Inquiry

Primary Lead Source: Newspaper
Secondary Lead Source: Tribune
Inquiry Taken By: Jason Oefstedahl
Inquiry Status: Set Appointment

Product Interests

Windows - Double Hung

Appointment

Salesperson 1: Mary Smith
Appointment Date: Saturday, October 18, 2014 at 12:30 PM
Appointment Set By: Jason Oefstedahl

[Back To Appointment](#)

Ok, we look forward to meeting you on 10/18/2014 at 12:30 PM at 525 Golf Course Rd in Forest City.

Do you have any questions for me?

Ok, thanks for calling XYZ Remodeling, have a wonderful day!

Inquiry Status:

Set Appointment ▼

Click to attach an Activity or Activity Process:

[Add Activities](#)
[Add Activity Processes](#)

[Start Over](#) | [Jump To Contact Detail](#)

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