[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Customer Service Script

Read this script in your own words rather than word for word, so the conversation sounds natural. The lines in quotation marks are the words to say at each stage; the guidance in between tells you what to do and what to listen for.

This script covers [Type of service covered by this script] for [Company name]. Before each call, have the customer's record open and know the service details you may need to confirm.

1. Greeting

Answer promptly, with a warm and professional tone. Say:

"Good morning, thank you for calling [Company name]. My name is [Agent full name]. How can I help you today?"

Listen to the full request before replying. Do not interrupt, and note the customer's name and the reason for the call as they speak.

2. Identifying the customer and the need

Confirm who you are speaking to and find the right record. Say:

"Thank you, [Customer full name]. So I can find your record, could you please confirm your [Account identification detail requested]?"

Then ask open questions to understand the need. Say:

"Could you tell me a little more about what you need, and when you need it by?"

Repeat the need back in your own words and check that you have understood it correctly before moving on. Say:

"Just to confirm, what you need is [Summary of the customer's need]. Have I understood that correctly?"

3. Showing understanding

Acknowledge how the customer feels, especially if something has gone wrong. Say:

"I understand how frustrating that must be, and I am sorry this has happened. Let me see what I can do to put it right."

Do not blame the customer, another team, or a previous agent. Keep the focus on the solution.

4. Offering the solution

Explain the solution in plain language, including what will happen, when it will happen, and anything the customer needs to do. Say:

"Here is what I can do for you: [Description of the solution offered]. That will be completed by [Date the solution will be completed]. Does that work for you?"

If the customer is unsure, offer the next best option rather than repeating the same offer. Say:

"If that does not suit you, the alternative is [Description of the alternative offered]. Which of those would you prefer?"

5. Handling an objection or a difficult moment

Stay calm, let the customer finish, and thank them for explaining. Say:

"Thank you for explaining that. I understand why that matters to you, and I would like to help. Let me check what else is possible and come back to you with a clear answer."

Do not promise anything you cannot deliver. If you need to check, say so, give a time for your reply, and keep to it.

6. Escalation

Escalate when the request is outside your authority, when the customer asks for a supervisor, or when the issue remains unresolved after you have tried the available solutions. Say:

“I want to make sure your concern is fully addressed, so I am going to pass this to [Name and job title of the escalation contact], who can help further. I have recorded everything we discussed, so you will not need to repeat it. You will hear back by [Date and time of the promised callback].”

7. Closing the call

Summarise what was agreed, confirm the next step, and offer further help. Say:

“To confirm, the agreed next step is [Agreed next step], and [Owner of the next step] will complete it by [Date the next step will be completed]. Is there anything else I can help with today?”

Then close warmly. Say:

“Thank you for calling [Company name], [Customer full name]. Have a good day.”

8. After the call

Complete the record immediately, while the conversation is fresh. Record the customer's need, the solution agreed, any promise made, and the owner and date for each promise. If you escalated the case, pass the full record to the receiving team on the same day.

Script owner	[Full name and job title of the script owner]
Last reviewed	[Date this script was last reviewed]
Next review due	[Date the next review of this script is due]