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## Meet Kate Kingston

Kate Kingston, President & Founder of the Kingston Training Group has been exclusively educating business technology sales executives on every type of prospect across 60+ industries and how they proprietarily use technology for over 20 years. This knowledge is the cornerstone of KTG's prospecting training and empowers the sales executive to schedule more net new meetings at the C-Level with a vertical focus through foot, phone, email, and social media to (money - back) guarantee at least a sustainable 50% increase in net new meetings so they can sell more Hardware, Software, Document Management, Managed IT, MPS, MS, ECM, 3D, Supplies, Telecom, and Mailing solutions across your entire salesforce. This results in a sales force that can recommend the right technology infrastructure solutions by enhancing their understanding of their prospect's business creating more robust proposals and sales.

Kate is a recognized as an authority on lead generation, recruiting new hires from a prospecting skill base prospective, and new business development **and enhancing customer service excellence.**



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Diane Waltemath  
founder/CEO



[diane@performancenow.us](mailto:diane@performancenow.us)  
[www.performancenow.us](http://www.performancenow.us)



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**Kingston Training Group**  
**5 Ways to Increase Customer Service Excellence**  
**BTA Webinar Factsheets**

The Purpose of Evaluating your Customer Service

- Evaluating and tweaking the communications, both electronic and verbal with customers and vendors and employees.
- Standardize query answers, show appreciation for both sales executives and customers, and deliver a more professional communication experience.

One way to Up Level your customers experience is to standardize the answers to the most common queries. This can be accomplished by creating consistent interactions and controlling the narrative with how each employee answers and ends their phone and email as well as looking at the hardcopy communications email and email correspondence from each of your department's email.

**By Email:** Have each department to member forward you at least 10 emails that they recently sent customers use this email to send to them for that request

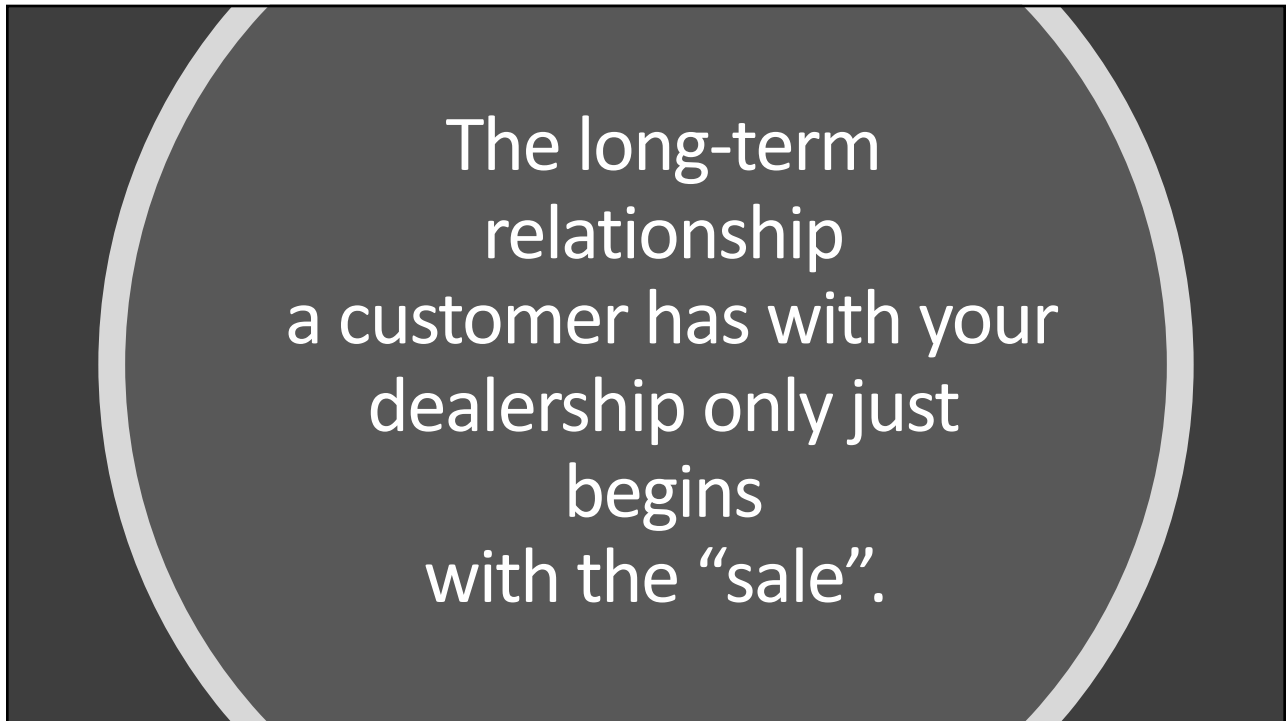
Send this simple email to each member of your team

Hi \_\_\_\_\_,

Can you do me a favor and forward me the last 10 emails you sent customers today or yesterday. I need to check something on our end. - Thanks!

King Group Inc. | 10000 Kingston Road | Kingston, NY 12150 | 518-537-2100

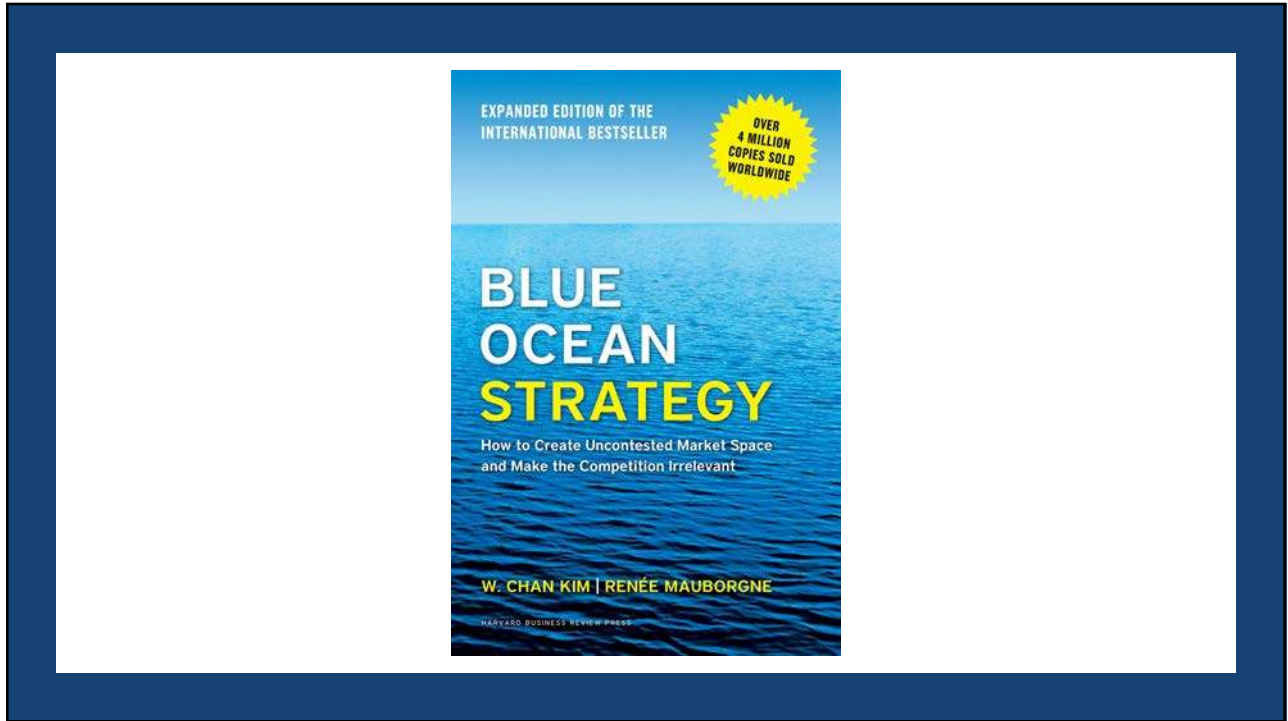
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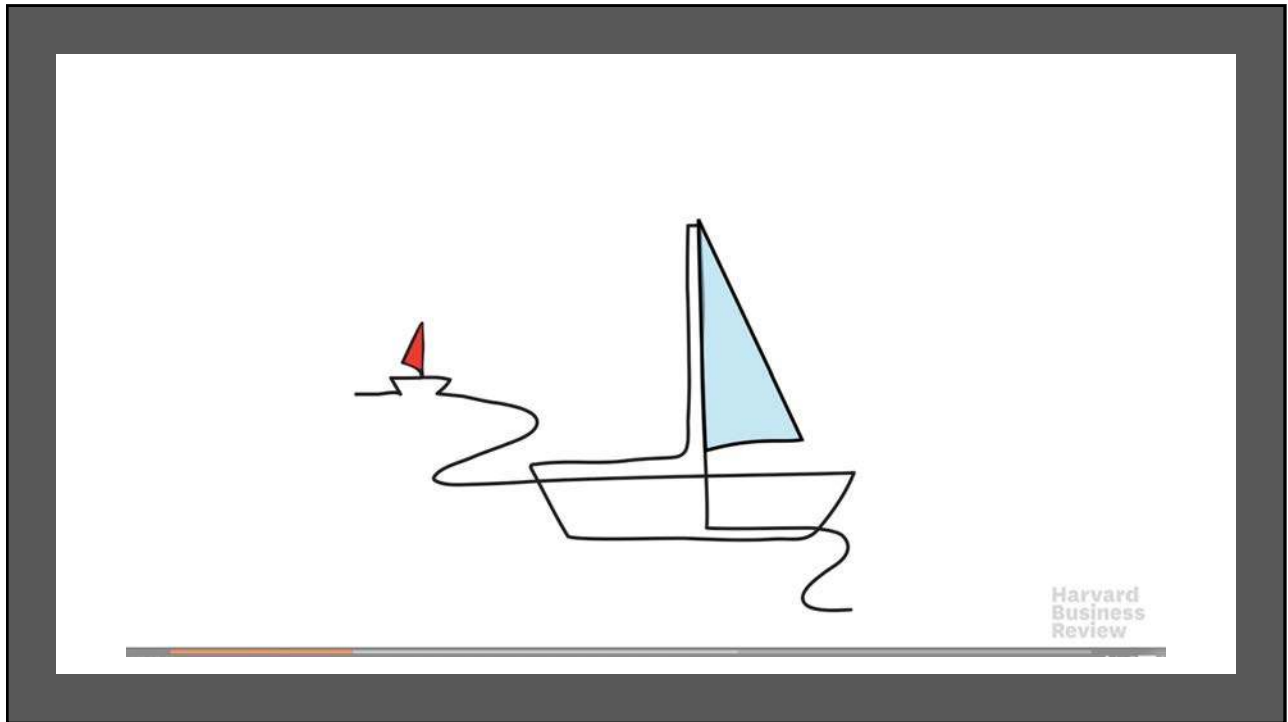
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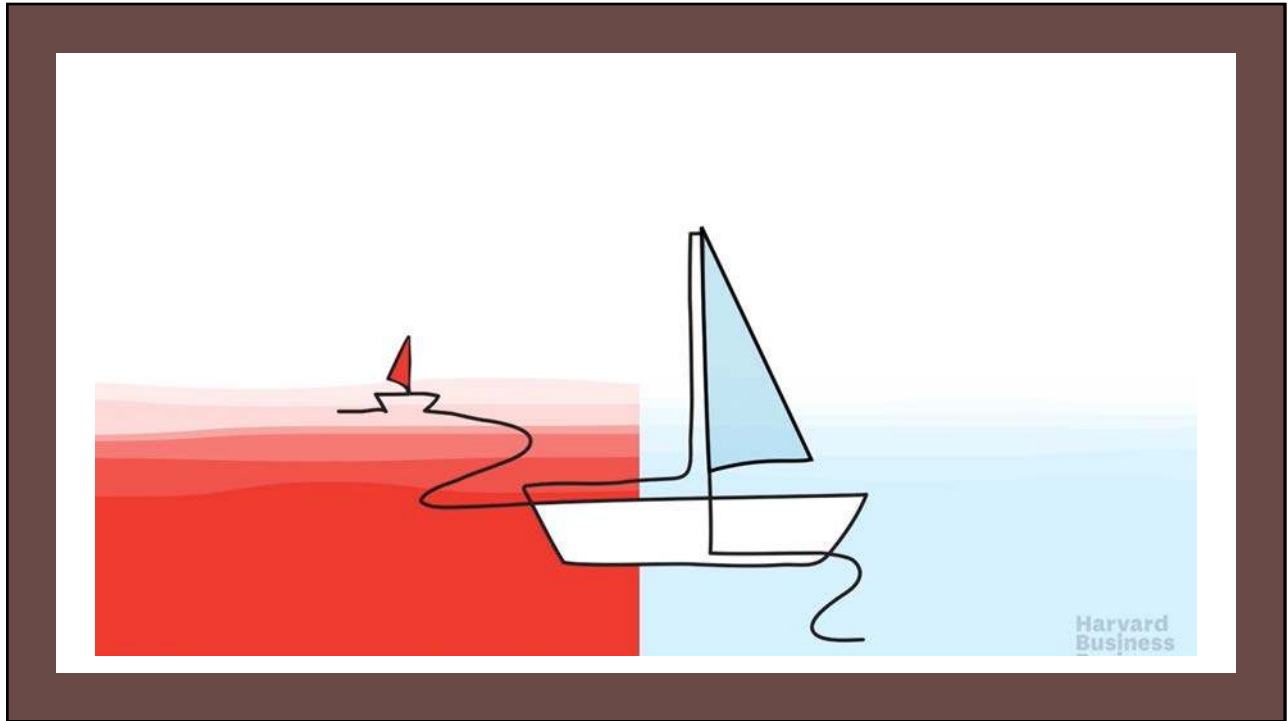
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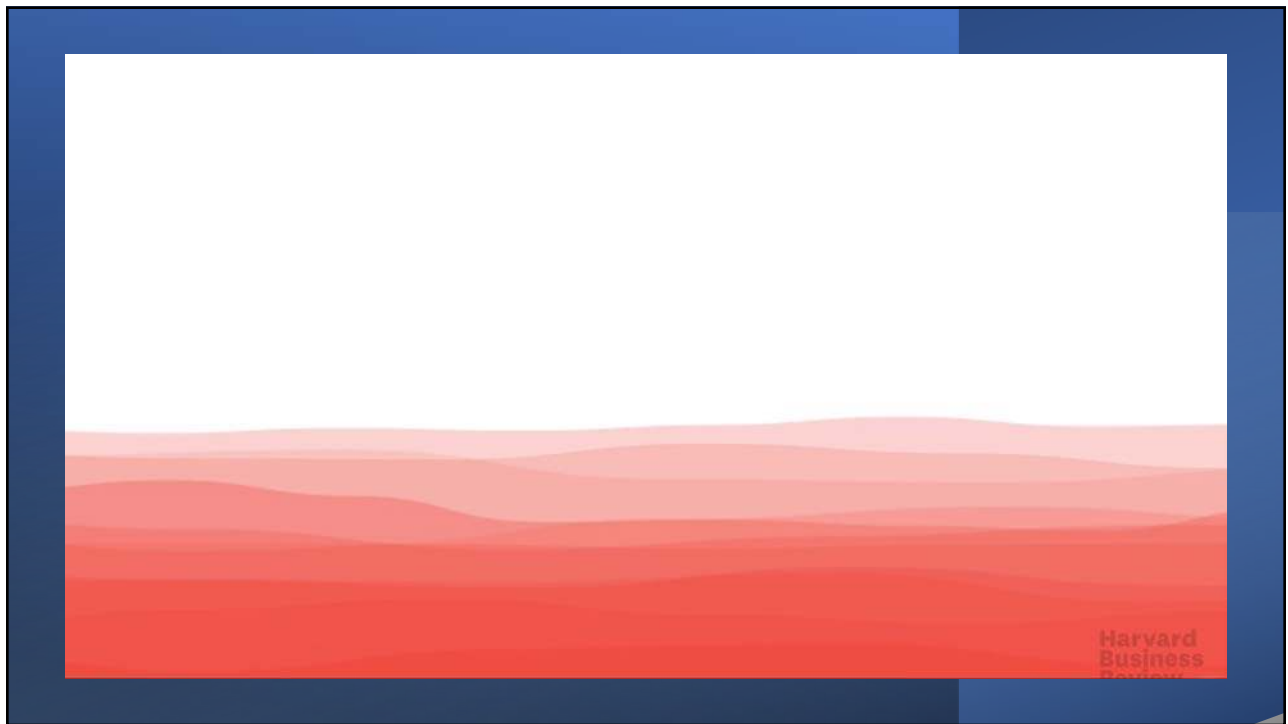
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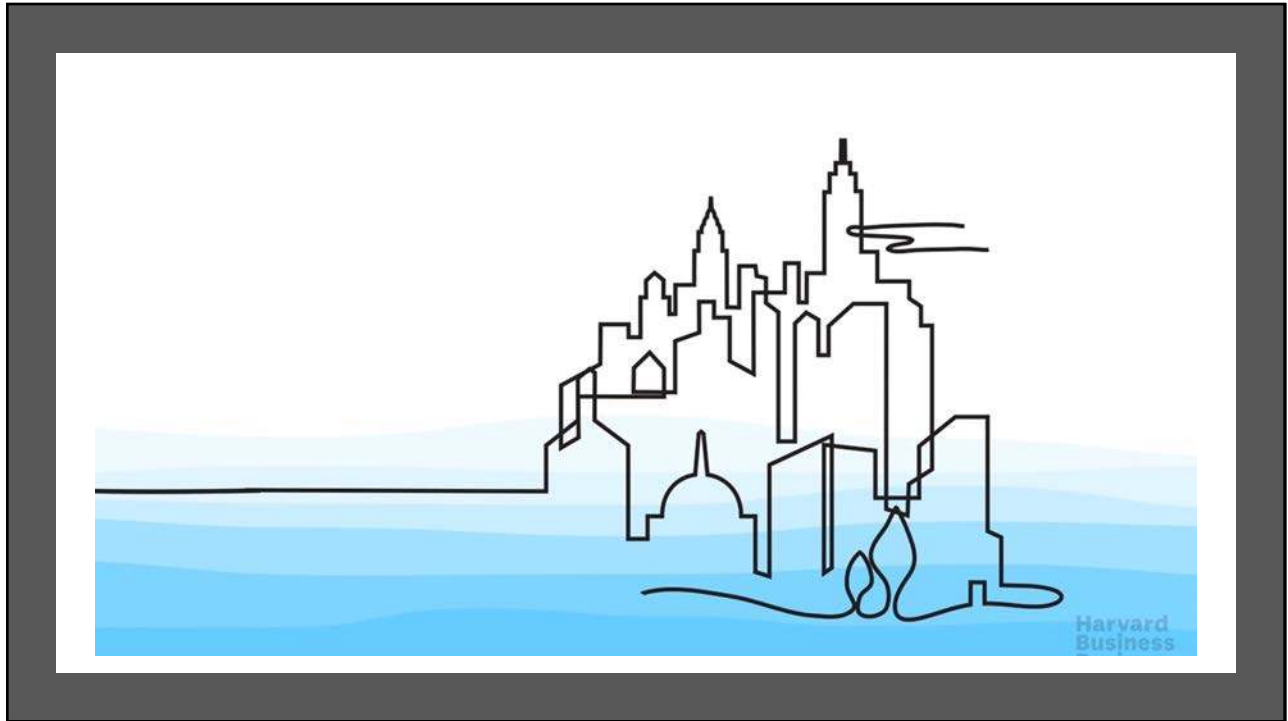
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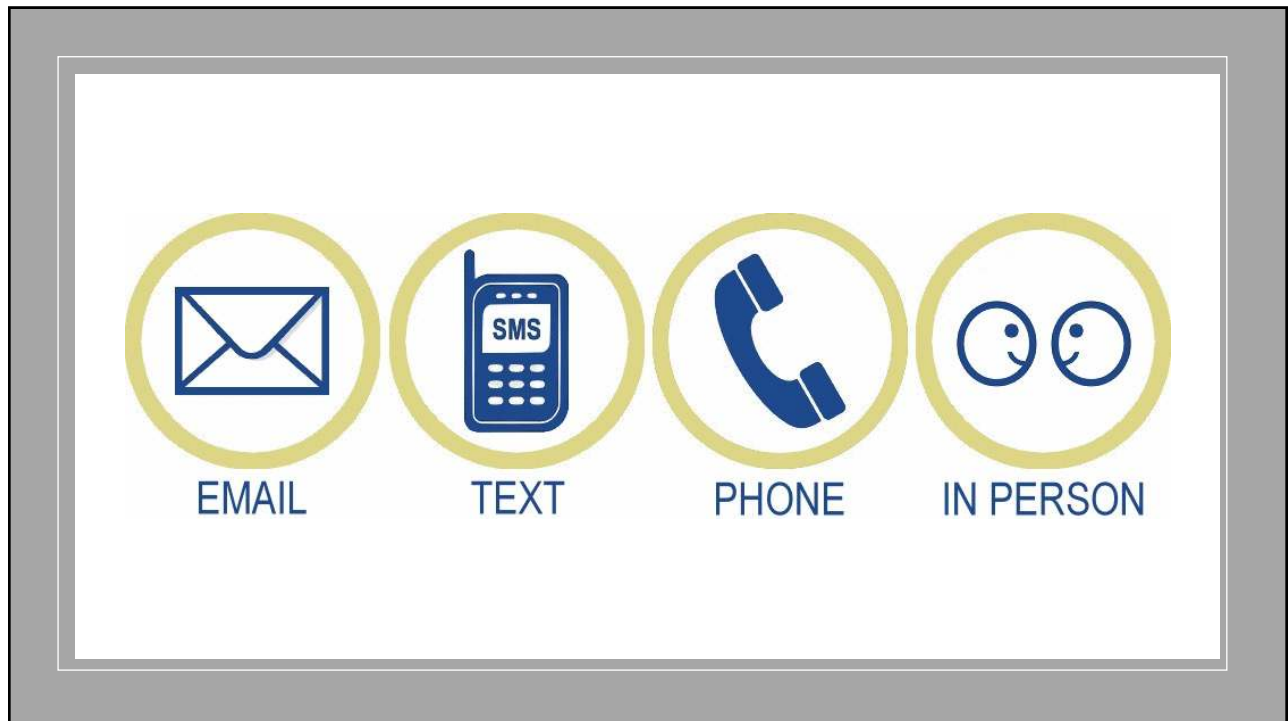
# The Purpose of Evaluating your Customer Service

Evaluating and tweaking the communications, both electronic and verbal with customers and vendors and employees.

Standardize query answers, show appreciation for both sales executives and customers, and deliver a more professional communication experience.

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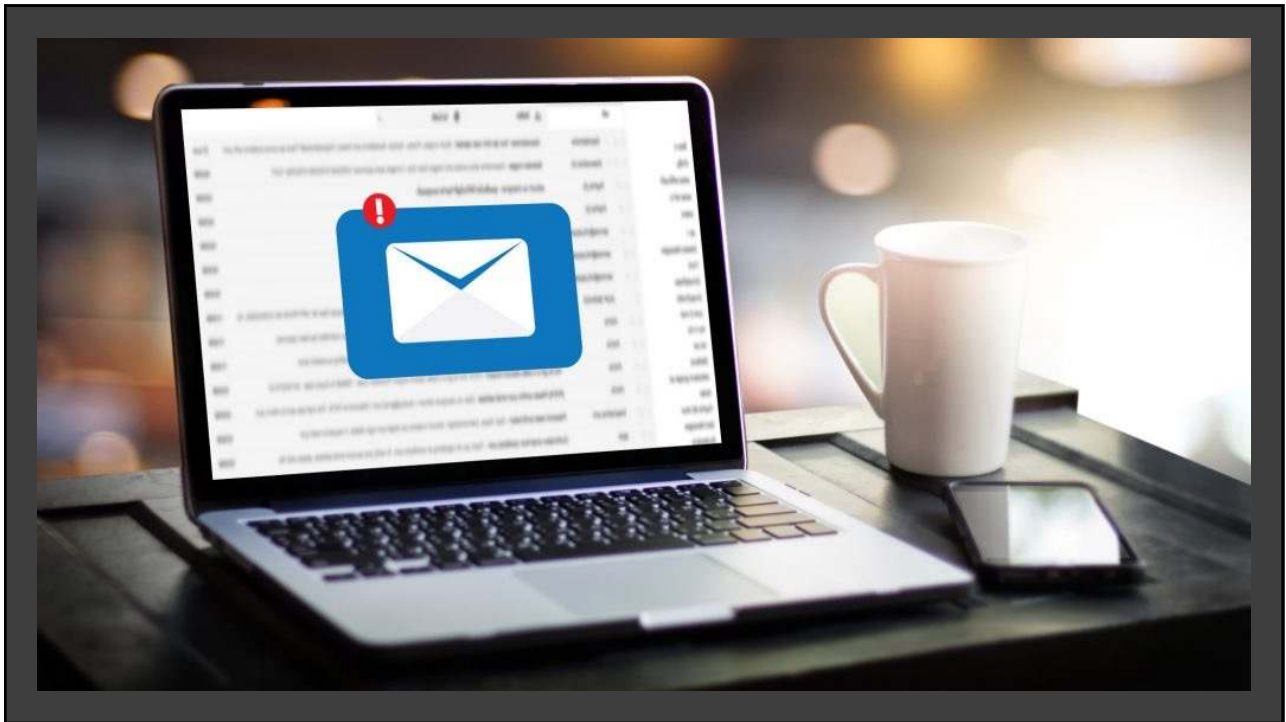
13



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15



16





Have each department forward you the last 10 emails they sent to customers

17

From Every Department that touches the client

- Customer Service
- Dispatch
- Supplies
- IT Support
- Accounts Payable
- Accounts Receivable
- Logistics
- Technicians
- Contracts
- Remote Access
- Purchasing

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## Send this simple email to each member of your team

Hi \_\_\_\_\_;

Can you do me a favor and forward me the last 10 emails you sent customers today or yesterday. I need to check something on our end. – Thanks!

19

SUCCESSFUL SERVICE REQUEST RECEIVED TEMPLATE AND CONFIRM EQUIPMENT ID .....

SERVICE REQUEST CONFIRMATION EMAIL TEMPLATE.....

CONVERT 2: VIS EMAIL TEMPLATE .....

CUSTOMER PORTAL INFO: SIGN UP USING OUR PORTAL EMAIL TEMPLATE.....

RECYCLING EMAIL TEMPLATE.....

TONER RECYCLING: SENDING PRE-PAID SHIPPING LABELS EMAIL TEMPLATE .....

**DEALERSHIP CUSTOMER SERVICE EMAIL & TALK TRACK TEMPLATES.....**

1) TONER SHIPPED TO OUR CUSTOMER, UPS POD SHOWS TONER DELIVERED AND SIGNED BUT CUSTOMER SAYS DOESN'T HAVE TONER TALK TRACK.....

1<sup>ST</sup> ATTEMPT STALE - CUSTOMER SERVICE TOOL STOPPED REPORTING EMAIL TEMPLATE .....

1<sup>ST</sup> ATTEMPT STALE - PULSE CUSTOMER SERVICE TOOL EMAIL TEMPLATE .....

2<sup>ND</sup> ATTEMPT STALE - CUSTOMER SERVICE TOOL EMAIL TEMPLATE .....

2<sup>ND</sup> ATTEMPT STALE - PULSE CUSTOMER SERVICE TOOL EMAIL TEMPLATE .....

3<sup>RD</sup> ATTEMPT STALE - CUSTOMER SERVICE TOOL EMAIL TEMPLATE .....

3<sup>RD</sup> ATTEMPT STALE - PULSE CUSTOMER SERVICE TOOL EMAIL TEMPLATE .....

STALE DEVICES EMAIL TEMPLATE .....

STALE DEVICES: PULSE.....






3<sup>RD</sup> ATTEMPT FOR DEVICES STOPPED REPORTING EMAIL TEMPLATE .....

NEW CUSTOMER SERVICE TOOL CUSTOMER EMAIL TEMPLATE .....

CUSTOMER SERVICE COVERAGE TALK TRACK - CALLING CUSTOMER .....

20

# Look For

-  Subject title
-  Spacing
-  Grammar
-  Clear, easy to follow directions
-  Customer Appreciation

21

## Original Deliverable

Hi - Thank you for submitting your count online for us. Can you please double check it for us? The count came through as "0". Please either send the counts by return email or resubmit. Make sure that no front zeroes or any punctuation is used that could cause this to happen.

Best,

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# What good looks like

**Subject Title:** From (Insert your dealership name) - Quick question regarding your online meter reading submission for (Insert their company name)

**Body:** Good morning (Insert clients name).

I am writing to thank you for submitting your meter reading online for us. Here at (Insert your dealership name), we continue to strive towards reducing the workload for our clients, even when delivering important information to us. We are glad that the online submission is working for you. When you submitted, the count came through as "0".

We would ask if you could double check your numbers and make sure that no front zeroes or any punctuation is used. That is usually the cause of a "0" value submission. Please resubmit online, or if you prefer, you may respond with your numbers via email.

(Insert your dealership name) appreciates your business. We are focused on the success of (Insert the name of client's company) through technology innovation.

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# Look For



Subject title



Spacing



Grammar



Clear, easy to follow directions



Customer Appreciation

24

## Original Deliverable

Hi ([Insert clients name](#)),

My colleague let me know you called today, sorry for the delay. We have updated your meter readings and revised the last invoice.

Please see attached.

Best, ([Insert your name](#))

25

## KTG Enhancement

**Subject Title:** From ([Insert dealership name](#)):  
Enclosed is a copy of your revised invoice that you requested.

**Body:** [Good morning \(Insert clients name\).](#)

[Thank you for being a valued customer.](#) My colleague shared that you called today and requested that we update your meter reading and revise your last invoice. I am happy to report that [this has been completed!](#) [Please let me know if there is anything else I can do to be of service.](#)

[Everyone at \(Insert your dealership name\),](#) appreciates your business and is focused on your company's success.

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## Original Deliverable

Hi (Insert clients name),

We received a notice from our spam filter that there was a problem with the main contact email address we have for you. Can you please verify your correct email address and also let us know whether you received an email from us for the meter reading? It would have come from (Insert your dealership name).

Thank you.

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## KTG Enhancement

**Subject Title:** From (Insert your dealership name): (Insert clients name), we received a notice about a problem with an email we have for you. - (Insert your name)






**Body:** Good morning (Insert their name).

Here at (Insert your dealership name), we are continuously striving to have the most current contact information for (Insert the name of client's company). This allows us to provide service as quickly and efficiently as possible for you. We recently received a notice from our spam filter that there was a problem with the contact email address we have on file for you. Can you please verify your correct email address and let us know whether you received an email from us regarding your meter reading? It was sent from (Insert the email address). Thank you for checking this and for your quick reply with any corrected or updated email contact information.

You can certainly reply to this email or please feel free to call us. My contact information is enclosed. (Insert your dealership name) appreciates your business. We are focused on the success of (Insert the name of client's company) through technology innovation.

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# Look For

-  Subject title
-  Spacing
-  Grammar
-  Clear, easy to follow directions
-  Customer Appreciation

29

# Good Ways to End Your Emails

- Everyone at ([Insert your dealership name](#)), appreciates your business and is focused on your company's success.
- ([Insert your dealership name](#)) appreciates your business.
- ([Insert your dealership name](#)) appreciates your business. We are focused on the success of ([Insert the name of client's company](#)) through technology innovation.

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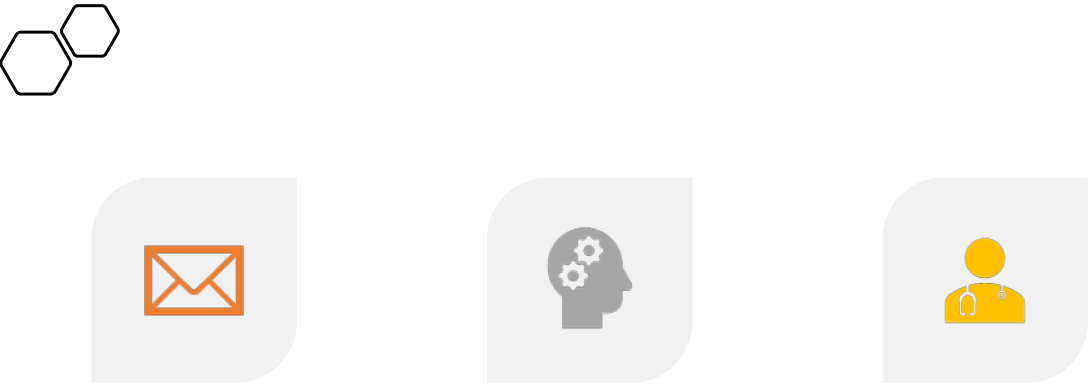
31

How your dealership interacts by phone

A black office phone with a handset and a small screen, shown in a circular frame.

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HOW QUICKLY YOUR PHONE IS ANSWERED, OR YOUR WEBSITE OR EMAIL QUESTIONS RESPONDED TO.

BRAINSTORM EVERY POTENTIAL SCENARIO YOUR SPECIFIC BUSINESS COULD ENCOUNTER.

DEVELOP CUSTOMER-FRIENDLY WAYS TO ADDRESS THEM.

33

Does everyone in your customer service department answer and end the phone call in the same way?



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# Customer Service Team

**Greeting:** Hello and thank you for calling (Insert your dealership name). This is (Insert your name) from your Customer Service Team. How may I help you?

## At the end of the call

**You:** While we are on the phone together, is there anything else I can do to be of service?

**If yes:** Then commence

**If no:** Everyone here at Dealership appreciates your business. Thanks for calling.

35

Call your customer service department multiple times during a week from a cell phone and identify the commonality of the way they answer the phone.

- 1.) Are they asking for your name and then not using it?
- 2.) Are they sharing their name?
- 3.) Are they thanking you for calling?



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Check their outgoing  
voicemail messages

37

# Accounting

## Outgoing Voicemail

*“Hi, you’ve reached (Insert your name) in the accounting department at (Insert company name).*

*Please leave me a message with your name, phone number, company, invoice or PO#, and a brief description of how I can be of help and I will call you back as soon as possible.”*

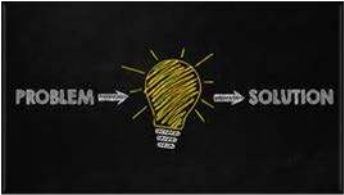


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# Cadence

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## Cash management

- Welcome Letter – New Customer
  - Tax ID, W9, ACH Payment Request
- Email Invoices vs USPS
  - Request on-time payment when able to demonstrate invoice delivery
- Set the appropriate Expectation within the AR department
  - Past due (1) day
- AR Activity Steps
  - 1 email, 2 email, 3 call
- Dealer Cadence
  - 3-day increments

40

Billing & customer experience



*shhh....  
it's a secret*

- DCA @ Onboard
- Convert CPC to Minimums
- Adjust Mins to accommodate Ovg's
  - Think comp plan, think pandemic
- Flat Fee Locals
- Flat Fee Contracts

41



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**Customers call asking leasing questions that require additional research Talk Track**

**You:** Kingston Technologies /this is \_\_\_\_\_ (Insert your name) how may I be of service?

**Client:** Yes, I have a question about my lease.

**You:** Certainly, how can I help?

**Client:** asks a question you don't know the answer to...

**You:** \_\_\_\_\_ (Insert their name), I want to answer your questions as thoroughly as possible. I will need a bit of time to research this for you so I can provide you with the correct answer. It's 1:45pm, I will call you back in \_\_\_\_\_ (Insert time frame) minutes or by \_\_\_\_ (Insert time) and provide you an update on the issue. It is my hope to be able to deliver the information you are looking for. Would that work for you?

43

Every  
Department  
that touches  
the client

- Customer Service
- Dispatch
- Supplies
- IT Support
- Accounts Payable
- Accounts Receivable
- Logistics
- Technicians
- Contracts
- Remote Access
- Purchasing

44



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## Accounting Professional Header

---

As an Executive Accounting Specialist here at (Insert your dealership name). I provide best in class quick resolution for all invoice and payment questions.

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**Incoming Call for Customer Print – Scan Issue Talk Track**

**"I can't scan". "I can't print". "I have a new computer and need it setup". "We switched from Verizon to Comcast etc."**

1. **Positive response:** *OK. Thank you for calling us. I'm sorry that you're having this issue and I'm happy to try to help.*
2. **Confirmation:** *So just to make sure I understand, you want (repeat what they want)?*
3. **Response:** *OK. Let me first say that this is important to me that we resolve this for you and I am sorry you are having this issue. I understand how frustrating it can be. I'll do all I can to help! I have a few questions for you, is that ok?*

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Build Brand Loyalty with  
Exceptional  
Customer Service

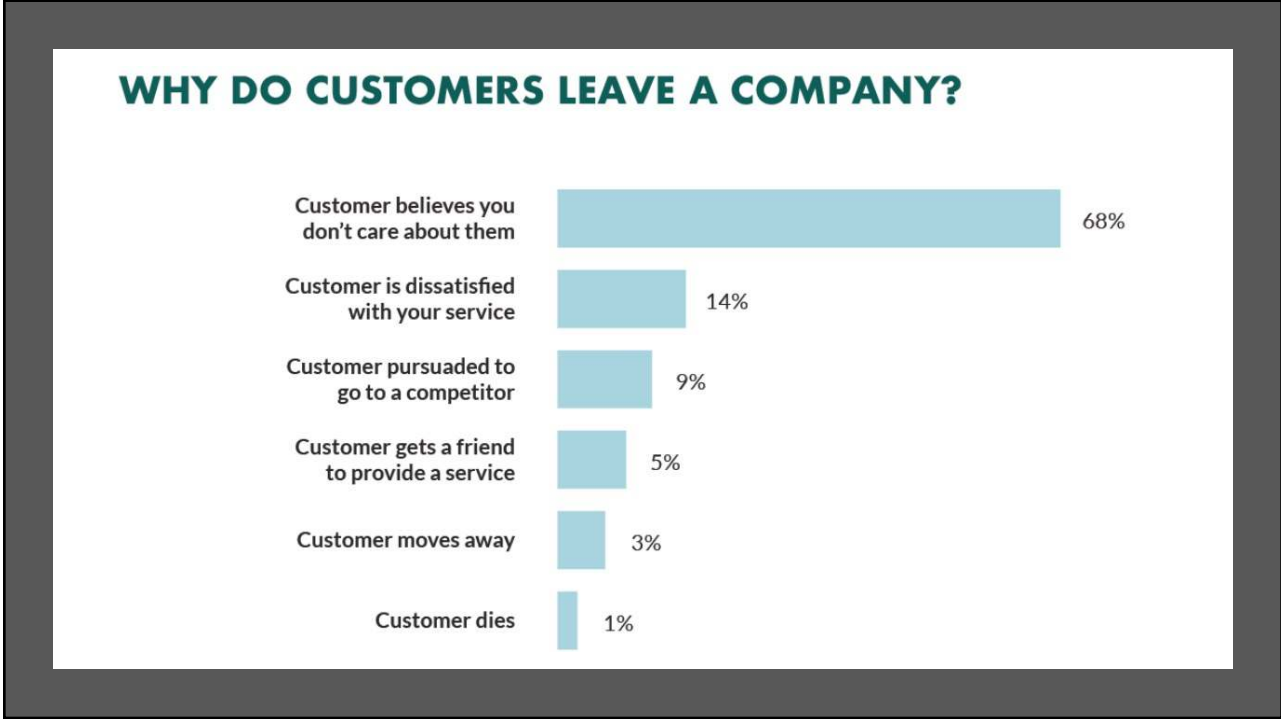
50

# Microsoft 360's State of Global Customer Service Report

95% of respondents cite customer service as important in their choice of and loyalty to a brand.

61% of our respondents have switched brands due to poor customer service

51



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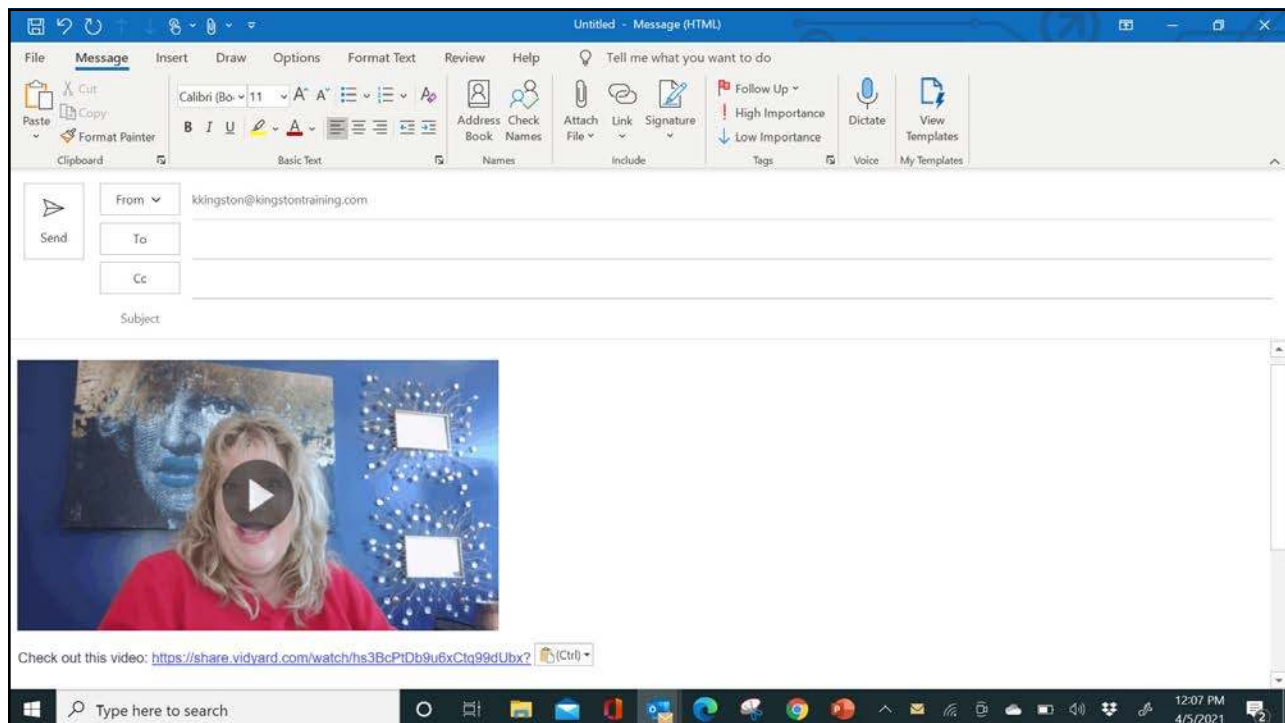
55

Inside your customer portal tool why not have a library of videos that can be accessed on demand to answer certain query questions in real time.

56

1. Toner Return and Reimbursement Email Script
2. Customer Issue with Lines on Their Copies Email Template
3. Postage Meter: Needs to be Synced
4. Waste Container Full
5. Customer Issue with Lines on Their Copies Talk Track
6. Sign up for the Customer Portal

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## **Change Management**

The methods and manners in which a company describes and implements change within both its internal and external processes. This includes preparing and supporting employees, establishing the necessary steps for change, and monitoring pre- and post-change activities to ensure successful implementation.

60



## Change management

- Customer Rollout
  - Qualify all Details, Set the Expectations
- Project Management Tools
  - SmartSheet.com
- Change Management Letter
  - Customer facing; all locations
- Critical Services document
  - At-a-Glance
- Desktop Marketing
  - Critical Services
- Customer Welcome Letter
  - Generates from AR dept

61



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<https://vendordirectory.shrm.org/category/testing-surveys/customer-satisfaction-surveys>

63

The screenshot shows a web browser window displaying the SHRM Human Resource Vendor Directory. The page title is "SHRM Human Resource Vendor Directory" and the breadcrumb trail is "SHRM Human Resource Vendor Directory > Testing & Surveys > Customer Satisfaction Surveys". The main heading is "Customer Satisfaction Surveys (21 companies found)" with the subtext "Compare and research Customer Satisfaction Surveys companies and businesses".

The first search result is for "HR UNLIMITED INC." with the following details:

- Logo: HR UNLIMITED INC.
- Text: "HR Unlimited, Inc. Get our FREE Checklist for OFCCP Audits www.hrunlimitedinc.com"
- Actions: "click for phone", "Send an email", "5 products", "2 white papers", "write a review"
- Description: "HR Unlimited's proven strategies have streamlined the process of Affirmative Action Plan development, allowing us to provide plans to our clients on an expedited timeline. Our mission is to provide superior client-focused and cost-effective specialized human resources to our clients."

The second search result is for "National Business Research Institute" with the following details:

- Logo: NATIONAL BUSINESS RESEARCH INSTITUTE
- Text: "National Business Research Institute Customer Survey Company"
- Actions: "click for phone", "Send an email"

On the right side of the page, there are two promotional banners:

- Top banner: "msi" with the text "Estimate your cost + tax implications REAL-TIME when deploying talent globally." and a calculator icon.
- Bottom banner: "peopletraf" with the text "Your Trusted Screening Provider" and a "Learn More" button.

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survey needs.

15 Best SurveyMonkey Alternatives

Software	Pricing	Rating (G2)
<a href="#">SurveySparrow</a>	Free Trial. Basic plan – \$19/month	4.5 (371 reviews)
<a href="#">SurveyMonkey</a>	Starts at 21\$/month	4.4 (16,360 reviews)
<a href="#">Typeform</a>	\$35/month	4.5 (412 reviews)
<a href="#">SurveyGizmo (Alchemer)</a>	\$300/annum	4.3 (625 reviews)
<a href="#">Qualtrics</a>	\$1500/annum	4.4 (2205 reviews)
<a href="#">Jotform</a>	\$29/month	4.5 (316 reviews)

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## Identifying and Fixing the Root Causes of Customer Dissatisfaction

66

1. Which of the following words would best describe our service how well has the technology met your needs?

2. If there's one thing that you would suggest improvement in our processes of serving you what would that be?

3. How easy is our website to navigate?

4. How easy is our customer portal to navigate?

5. How much effort did you personally have to put forth in getting your request from our dealership handled ?

6. To what extent would you agree with this following statement? - Kingston Technologies made it easy for me to handle this issue

7. With a scale of 1 to 10 - how likely would you be to recommend Kingston Technologies to a friend or colleague?

8. What would you say to about our products and service if somebody asked you?

- What else would you like us to know about improvements you would like see?

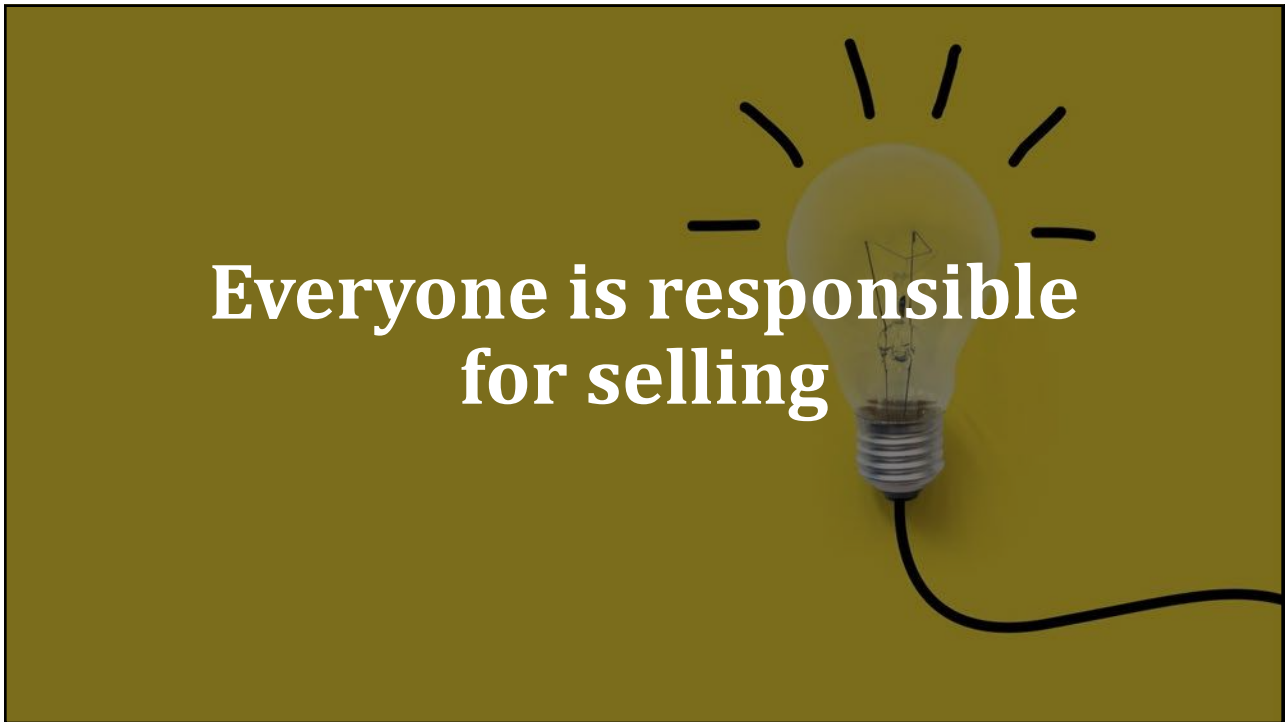
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70

# Craft email signature options that include all your selling solutions

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Here at \_\_\_\_\_, we continue to evaluate and add the best of breed new solutions to better serve our customers in building the smartest office environment in the industry.

- From temperature scanning to allow staff customers or staff into your physical offices more successfully and safer
- Securely controlling, accessing, and backing up your fully-functioning growing network and all the technology tools you use everyday
- Dark Web Monitoring utilizing the industry's first commercial solution to detect your compromised credentials in real-time
- Secure, scalable, reliable, and cost-effective phone systems that allow faster and more secure internal and external communications
- Streamlining our print infrastructure and reducing your printing costs by as much as 30%
- Digitizing your paper-based processes and automating manual tasks to better control document workflow
- Interactive touch display signage that offer unique opportunities for collaboration
- The most functional, best of breed, multifunctional machines that can be customized for your company

As your one contact for your procurement, deployment, support, and technology, \_\_\_\_\_ can ensure system compatibility and continuity through standardization of technology and reduce your service requests and ownership of obsolete equipment. Please contact us to learn more or to schedule a demonstration of any of these solutions.

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## Phone Call Prior to Drivers Arriving

**You:** Good morning my name is (Insert your name). I am part of your technology team from (Insert your dealership name) and I am calling to provide an estimated window of time for my arrival in your offices at (Insert address). I wanted to be respectful of your time and so that you can better plan your workday, I will be leaving my current customer delivery visit in a few minutes and anticipate with traffic on arriving to your offices about (Insert time you will be there). While I have you on the phone, if you have a moment, are there any special instructions about our delivery – for example, is there a loading dock or other possible difficulties that you can share with me about bringing the technology into your space?

**Them:** Describes delivery instructions.

**You: if you don't need any more information or after they shared additional information:** Thank you for sharing that with me. I will think about this on my drive over and be fully prepared. I look forward to seeing you soon.

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### Personal Letter from President that Delivery Team Presents

*(A letter from President that he/she has signs and dealership reproduces. Letter comes in an envelope - not a legal letter size envelope but a smaller one the kind where you would hand write a thank you note.)*

*Just a note of thanks for trusting us with your newest technology acquisition. Everyone here at \_\_\_\_\_ will continue to work hard to provide the most cost effective, best customer serviced; technology solutions available.*

*We look forward to helping you achieve the security of your information, meet your compliance requirements, reduce workload and enhance profitability for your company through technology.*

*Please feel free to reach out to me or any team member at \_\_\_\_\_ to allow us to help whenever needed.*

*- Kate Kingston*

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KTG Customer  
Service Follow Up  
Talk Track

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Here is what I would say...

Receptionist: *"ABC Law Firm, how may we help you?"*

Upper Management: *"Yes, hello, my name is Kate Kingston from Kingston Technologies, we work together. We are your technology partner, and I was calling to speak to John Bellows. He met with our technician yesterday when we came in to help you with a technology service call. If he is available could I speak with him briefly?"*

If you notice, I put my name, title, and my company name at the top of the call with the receptionist because I want her to use that when she speaks to the customer so there is recognition of your dealership. The receptionist will either be connecting you directly to the customer or to his voicemail. Either way I leave the same message.

Live answer with the Customer...

Customer: *"This is John"*

Upper Management: *"Hi John, my name is Kate Kingston I'm part of your team here at Kingston Technologies. I'm head of customer service and am calling to thank you for the opportunity of being of service yesterday, I was pleased that our technician Mike was able to resolve your issue. I know you are in good hands with Mike and we're all here to be of service to ABC company."*

*I wanted to provide my direct number if you ever need it as we want to easily available and accountable in our focus on providing you the best customer service in the industry. Please feel free to reach out to me with any questions or comments you have. My number is \_\_\_\_\_"*



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Customer: *"Thank you."*

Upper Management: *"Certainly John, thanks for taking time to speak with me. I had one quick question. As you think back, was there anything that Mike or Kingston Technologies could possibly have done better, faster, or smarter during our preparation for, or execution of our service visit that you would like to see in the future?"*

Customer: provides feedback

**If feedback isn't positive**


Upper Management: *"Thank you for the feedback. I will meet with our team and we will work on improving – this was helpful – thanks for speaking with me today and please reach out to us with things we can do to be of help. We appreciate your business."*

**If feedback is positive**

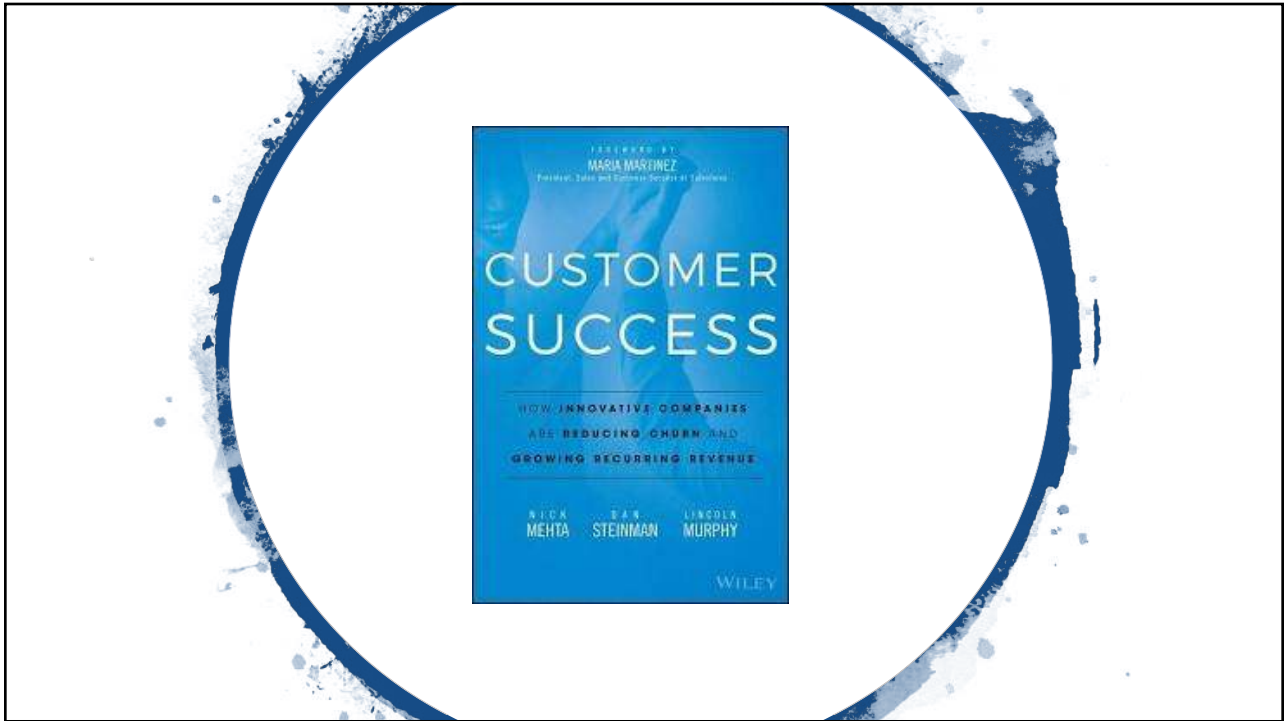
Upper Management: *"Thank you for the feedback and thanks for speaking with me today and please reach out to us with things we can do to be of help. We appreciate your business."*

If you get their voicemail...

Upper Management: *"Hi John, my name is Kate Kingston I'm part of your technology team at Kingston Technologies. I am head of customer service. I am calling to thank you for the opportunity of being of service yesterday and was pleased that our technician Mike was able to resolve your issue. I know you were in good hands with Mike and we are all here to be of service to ABC company."*



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Diane Waltemath  
founder/CEO



[diane@performancenow.us](mailto:diane@performancenow.us)  
[www.performancenow.us](http://www.performancenow.us)

A portrait of Diane Waltemath, a woman with blonde hair, smiling. The background of the portrait is dark with out-of-focus yellow and white lights, suggesting a night scene with bokeh.

82

**KTG created and delivered a robust training schedule to deliver weekly content and continue to work with all team members to:**



Evaluating new content.



Agree on using new content.



Provide additional weekly assignments to KTG to create additional professional answers to every circumstance that team members could envision.

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Make customer service training an ongoing part of your company's professional development program.

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6)	Prior to Service Technician arriving ON TIME at Customer Office Talk Track	4
7)	Prior to Service Technician Arriving LATE at Customer Office Talk Track	4
8)	Prior to Service Technician Arriving LATE to Customer Office Email Template	4
9)	New Service Call Email Template	5
10)	Service Call Completed Email Template	5
11)	No ETA on Part Needed to Resolve Machine Issue/Repair Talk Track	5
12)	ETA Request on Equipment Delivery & ETA is Known Talk Track	5
13)	ETA Request on Equipment Delivery & ETA is Unknown Talk Track	6
14)	ETA Request on Equipment Delivery & ETA is Unknown Email Template	7
15)	Customer's Internal IT Department Installing Equipment Talk Track	7
16)	Issue Resolved Service Completed for Help Desk Only Email Template	7
17)	Issue/New Help Desk Service Call Created Email Template - Doris	8
18)	Customer ETA Request for Service Technician Talk Track	8
16)	Waste Container Full Talk Track	9
19)	New Vendor Service Call for Out of Territory Machine Email Template	10
20)	New Vendor Follow Up on Status of Service Call for Out of Territory Machine Email Template	10
21)	Customer Issue with Lines on Their Copies Talk Track	10
22)	Customer Issue with Lines on Their Copies Email Template	11
23)	FP Postage Meter: Needs to be Synced Email Template	12
24)	FP Postage Meter: Printing ½ the Postage Response Email Template	12
25)	FP Postage Meter: Customer Account Disabled Email Template	12
26)	How to Create an Email Signature in Outlook	13

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25)	Tracking Package That Has Been Signed for Talk Track	17
26)	Calls Directed Incorrectly Talk Track	17
27)	Customer Questioning Charge for Toner Email Template	18
28)	Successful Supply Order Received and Confirm Equipment ID Confirmation Email Template	18
29)	Supply Request Confirmation Email Template	19
30)	Service Request Received/Confirm Equipment ID Email Template	19
31)	Service Request Confirmation Email Template	19
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## Collections Talk Tracks

*Created by The Kingston Training Group*

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## Kingston Training Group Customer Service Excellence Talk Tracks & Email Templates

### The Purpose

- Evaluating and tweaking the communications, both electronic and verbal with customers, vendors, and your employees.
- Standardize query answers
- Show appreciation for both sales executives and customers
- Deliver a more professional communication experience

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## The Outcome



Customer Service Excellence has set your dealership apart from our competition by committing to driving a standardized better customer experience.



Implementing over 300 well-crafted customer centric talk tracks and email communications which create a better deliverable and achieve better outcomes when interacting with our customers and internally with other departments.



Growth and profitability, which are vital to success, starts and ends with supporting our customers in every step of their journey through utilizing technology

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Kingston Training  
Group

**Kate Kingston**

**President & Founder**

**646.831.5184**

**[kkingston@kingstontraining.com](mailto:kkingston@kingstontraining.com)**

**[www.kingstontraining.com](http://www.kingstontraining.com)**

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