Inbound Customer Service Call Script

Lines marked [REQUIRED] must be read as written because they carry legal, security or policy weight. Everything else is a guide: agents may use their own words as long as the purpose of each step is met. Replace every bracketed item before use. Script owner: [Name, Title]. Version: [__]. Last reviewed: [Date].

1. GREETING (FIRST 5 SECONDS)

"Thank you for calling [Company Name], this is [Agent First Name]. How can I help you today?"

[REQUIRED where applicable] "This call may be recorded for quality and training purposes." (If your IVR plays this notice, the agent does not repeat it.)

If the caller's name is already on screen: "Hi, [Customer Name], thanks for calling [Company Name], this is [Agent First Name]. How can I help?"

2. IDENTITY VERIFICATION

[REQUIRED] "I'm happy to help with that. So I can access your account, can you please confirm your [full name] and [date of birth / ZIP code / last four digits of the account number]?"

If verification fails: "I'm sorry, I'm not able to match those details, so I can't discuss the account on this call. You can [verify through the app / call back with your account number / visit a branch]. Is there anything general I can help with?"

Never give hints about which detail did not match.

3. DISCOVERY: UNDERSTAND THE REAL REASON FOR THE CALL

Let the customer finish. Then ask one or two open questions:

"Can you walk me through what happened?"
"When did you first notice this?"
"What have you tried so far?"

Confirm understanding before acting: "So just to make sure I have this right, [summary of the issue]. Is that correct?"

If there are several issues: "I can help with both of those. Let's start with [most urgent issue] and then we'll take care of [second issue]."

4. ACKNOWLEDGE AND SET DIRECTION

Use a specific acknowledgement, not a generic apology: "Being charged twice right before rent is due is stressful, I understand. Let me look into this now."

Tell the customer what you're about to do: "I'm going to check the payment history on your account, which will take about a minute."

5. HOLD

[REQUIRED] Ask before placing on hold: "Would it be OK if I place you on a brief hold while I [check with billing / review the order]? It should take about [two] minutes."

Check back every [60] seconds: "Thank you for holding, [Customer Name]. I'm still working on this and need about one more minute. Are you OK to keep holding?"

Returning from hold: "Thanks so much for waiting. Here's what I found."

6. RESOLUTION

Explain what you did and what happens next in plain words: "I've reversed the duplicate charge of [$amount]. You'll see it back in your account within [3 to 5] business days, and you'll get a confirmation email in the next hour."

If you cannot do what the customer asked, lead with what you can do: "I'm not able to waive the fee itself, but what I can do is [alternative]. Would that work for you?"

Check for understanding: "Does that make sense, or is there anything about it I can explain better?"

7. TRANSFER OR ESCALATION

[REQUIRED] Warm transfer wording: "The best person to help with this is our [department] team. I'm going to bring them on the line and explain everything so you don't have to repeat yourself. Is that OK?"

To the receiving agent (customer on hold or listening, per your policy): "Hi, I have [Customer Name], verified, calling about [issue]. I've already [steps taken]."

If the queue is closed: "That team is available [hours]. I've noted everything on your account, and your reference number is [number]."

8. DIFFICULT MOMENTS

Upset customer: "I can hear how frustrating this has been, and I want to get it sorted for you. Let me [specific action]."

Customer asks for a supervisor: "I can arrange that. Before I do, may I try one more thing that might fix this now?" If they still want a supervisor, transfer per the escalation process without further pushback.

Abusive language: "I want to help you, and I'm not able to continue if the language continues. Can we keep working on this together?" If it continues, follow the [abusive caller policy] and give one final warning before ending the call.

Agent does not know the answer: "That's a good question. Let me check so I give you the right answer rather than a guess."

9. CLOSING

Summarize: "So to recap, [what was done] and [what happens next, with timeline]."

"Is there anything else I can help you with today?"

[REQUIRED where applicable] Survey notice: "You may get a short survey about this call. Thanks for taking the time if you do."

"Thanks for calling [Company Name], [Customer Name]. Have a good [morning / afternoon / evening]."

After the call: select the disposition code, write notes in the format [issue / action / outcome / follow-up], and complete after-call work within [__] seconds.

SCRIPT CONTROL

Script owner

Version number

Approved by (compliance / legal, where required)

Effective date

Next review date

Summary of changes from previous version