

EVERY DIAL COUNTS.  
ONLY THE BOLD RISE.

neighborly



THE  
DIAL GAMES

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GLASSDOCTOR<sup>®</sup>

CALL BLITZ PLAYBOOK

2026

# Let the Games begin.

As we head into 2026 with renewed focus and determination, it's time to step up our performance and drive strong customer growth across the brand. Maintaining a healthy customer count and increasing year-over-year results will require every team to bring their best effort.

Call blitzes remain one of the most effective ways to create quick momentum and convert leads into revenue. With a focused burst of outreach, your team can re-engage warm and cold leads, reach out to past customers, and follow up on open estimates that are ready to move forward. Your POS is full of opportunity, waiting for someone bold enough to claim it.

This year, we introduce The Dial Games, where every dial counts and only the bold rise. This challenge is designed to spark healthy competition, inspire action, and build high energy across the System. Beyond generating revenue, these events unite teams, boost morale, and strengthen a shared sense of purpose.

Gather your team. Set your strategy. Step into the arena ready to compete.



## The Dial Games Command Center

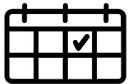
For the latest updates, tips, and progress, bookmark the [The Dial Games Command Center website!](https://www.NeighborlyBrands.com/Call-Blitz/)

<https://www.NeighborlyBrands.com/Call-Blitz/>



# Call Blitz Dates

We've designated a total of 6 Call Blitz dates to help you organize, set time aside and focus your efforts for maximum impact, however qualifying entries towards winning a contest prize can occur anytime beginning **March 12 to May 30, 2026**, by 5pm local time. Don't miss your chance to claim victory and check out the prizes at the end of this playbook, **with Neighborly awarding more than \$200,000 in prizes!**



## Mark your Calendar!

- March 12, 2026
- March 26, 2026
- April 9, 2026
- April 23, 2026
- May 7, 2026
- May 21, 2026

Contest ends May 30, 2026, at 5 p.m. local time.

# What is a Qualifying Entry?

Qualifying entries towards winning a contest prize can occur anytime beginning **March 12 to May 30, 2026**, by 5pm local time.

## Our Call Blitz counts a qualifying entry as:

A past customer who is reactivated	or	An unconverted prospect	or	A past or recent estimate
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↳ who books an appointment or another service as a result of your outreach.

Each individual customer record counts as one entry.

## Submit Your Entries

**Online Form:** Visit [the Call Blitz form](#) or scan the QR code with your phone to go to the form.



Scan QR Code

Bookmark the link to make weekly submissions fast and seamless.

**Excel:** While this is not the recommended method, you can submit your entries using an excel sheet it better suits your team's workflow.

1. Download [the template](#).
2. Log your entries.
3. Submit your completed file to Angie Sipes at [angie.sipes@nbly.com](mailto:angie.sipes@nbly.com).



Click to download

**Pro Tip:** Submit your entries weekly instead of waiting until the end. This keeps your tracking accurate and ensures nothing gets missed.



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THE

**DIAL  
GAMES**



**EVERY DIAL COUNTS.  
ONLY THE BOLD RISE.**

# Give Kudos!

We hope you will interact with us throughout the *Dial Games*!

Visit and bookmark this online “kudo board” below! It’s a great place to share exciting tips, customer reactions, and celebrations as you and your team grow your customer count!

**Click the link or scan the QR code below to visit our dedicated Dial Games Call Blitz Kudo Board!**



<https://neighborly.kudoboard.com/boards/N81M4Tp4/CallBlitz2026>

# Setting Up Your Call Environment

Stepping into The Dial Games begins with preparation. A strong setup can determine how far you advance in the competition. Follow these best practices to create an environment that keeps you focused, energized, and ready to make every dial count.



## **Choose a Quiet, Distraction-Free Space**

Find a location where you and your team can focus without interruptions. Minimize background noise and distractions to keep conversations professional and engaging.



## **Test Your Phone and Headset**

Ensure your phone or headset is working properly before you start. Clear audio is key to keeping the conversation smooth and professional.



## **Keep Your Script and Offers Handy**

Have your call scripts, voicemail scripts and offers details easily accessible so you can confidently guide the conversation and handle objections.



## **Prepare for Common Objections**

Consider potential customer objections and have responses ready to address concerns effectively. Role play objections with your team ahead of time.



## **Have a Positive and Energetic Mindset**

Your tone matters! Smile while you speak—it makes a difference in how you come across over the phone.



## **Celebrate the small wins along the way!**

Visit our *Neighborly Call Blitz* kudo board and give your team shout outs and have your own kudo “whiteboard” in the office to provide encouragement and support!

# Call Blitz Guidelines

In anticipation of the upcoming contest, please familiarize yourself with these guidelines and best practices around calling potential and existing customers. Ultimately, you are responsible for your compliance with all applicable laws during this contest and beyond. You cannot rely on us, a vendor or third party for compliance. If you fail to follow the law, your liability can be significant. Below are some key reminders:

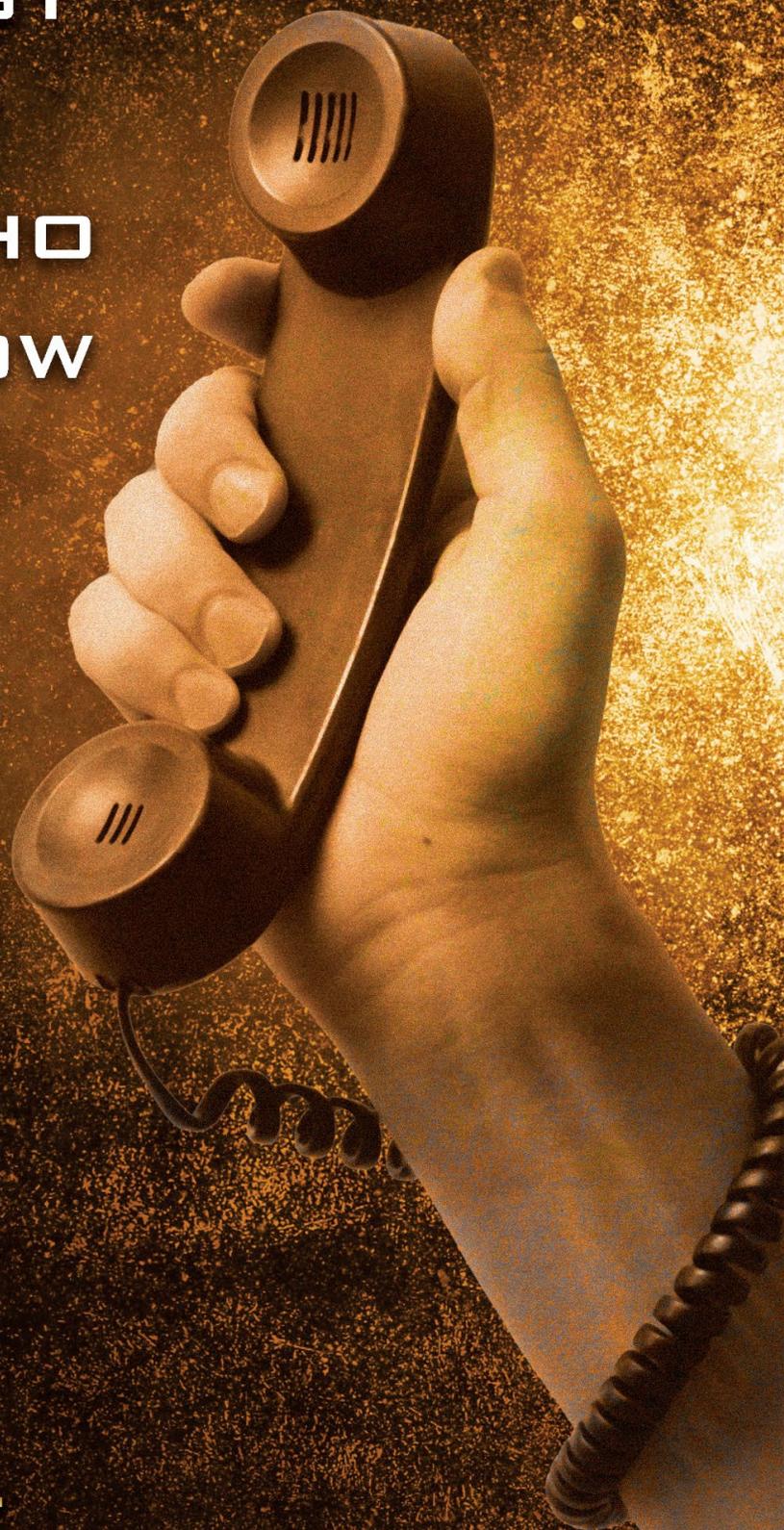
- CHECK all phone numbers against the National Do Not Call Registry (“DNC”) and do not call or text anyone who is on the list unless you have express written consent or an established business relationship.
- CHECK all phone numbers against your internal Do Not Contact list and do not call or text anyone who has previously asked not to be contacted, even if they previously gave consent or had an established business relationship.
- Do NOT call numbers and expect the consumer to tell you they are on the DNC. The call is a violation if that consumer was on the DNC before you called them. Apologizing and ending the call does not avoid liability.
- Do NOT make any calls outside of reasonable business hours. This applies to the time zone of the person you are dialing, so if you are dialing to earlier time zones be aware and be considerate. You must never dial outside of the 8 a.m. to 9 p.m. time frame (in the call recipient's time zone).
- Do NOT use autodialers or robo-dialers to call or text cell phones unless you have express written consent from the recipient.
  - Best to assume all phone numbers are cell phone numbers (or are ported to cell phones).
- Do NOT send automated or pre-recorded messages to any phone number unless you have express written consent from the recipient.
- Do NOT text someone unless you have their express written consent and you must comply with TCPA, including instructions and the ability to opt-out.

**Failure to comply with federal and state laws (which can be even more restrictive) governing the various methods used to contact consumers (i.e., calls, e-mails, texts, faxes) can lead to significant monetary penalties.**



**YOUR HOTTEST  
LEADS ARE  
THE ONES WHO  
ALREADY KNOW  
YOU.**

**STOKE THE  
FIRE AND  
BRING THEM  
BACK!**



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THE  
**DIAL  
GAMES**

# Gather Your List

As an introduction to the next section, we are overviewing what defines the date and/or criteria for unsold leads/estimates and past customers for our Brand. Also, we know your resources may be limited or your ability to target the entire list of unsold leads/estimates and past customers contact list may not be feasible, therefore we've outlined best practices and tips to ensure you contact the most important past customers in priority order.

## Unsold Customer Definition

*Unsold Leads/Estimates are defined as: Potential leads that did not convert or customers with unsold estimates within the last 30 days.*

## Past Customer Definition

*Past customers are defined as: customers we did business with in the last 12- 24 months.*

## Prioritization Criteria

*Prioritize unsold leads/estimates based on revenue opportunity, recency, and feedback from sales reps/estimators. For your past customers we recommend that you focus on calling your oldest customer to newest.*

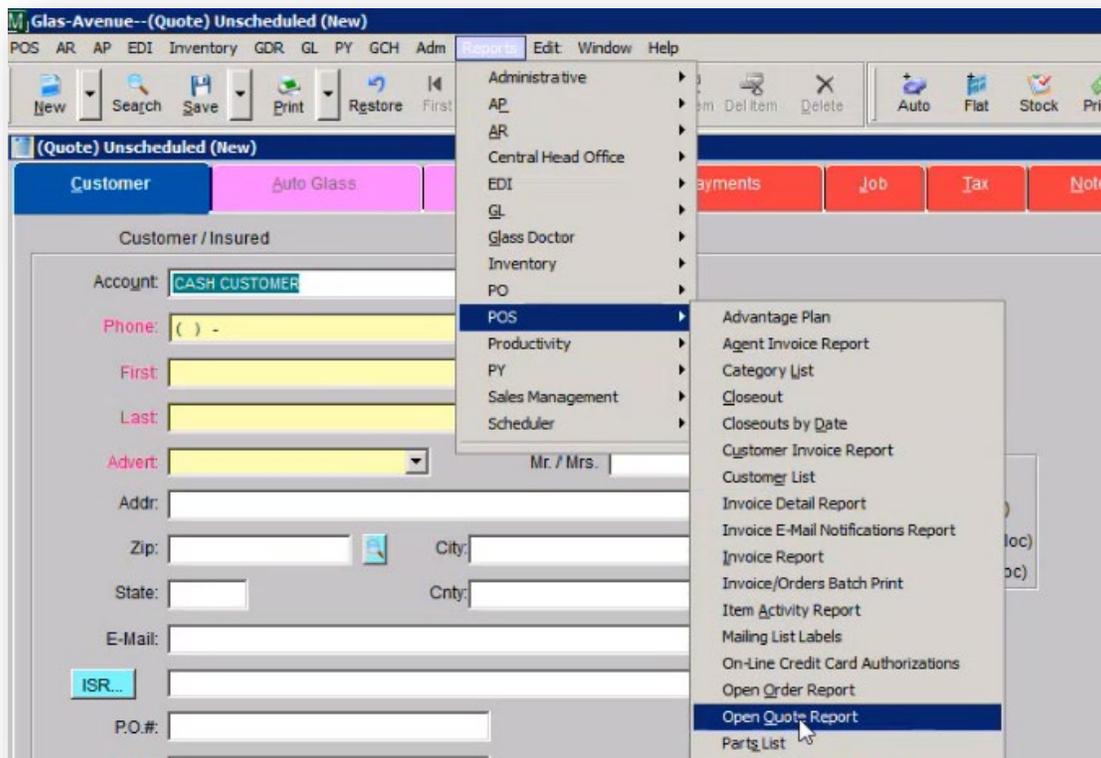
# Gather Your List Mainstreet POS

## Steps to Pull your Unsold Estimates/Leads and Past Customer Contacts

We have provided a detailed, easy step-by-step process for exporting unsold leads/estimates and past customer list from our Point-of-Sale (POS) system. If you have any questions as you follow the next few pages, please direct your questions to Shirley Witt at [shirley.witt@nbly.com](mailto:shirley.witt@nbly.com) or by phone at (254) 745-2480.

## Unsold Estimates/Leads

1. Go to **REPORTS > POS > OPEN QUOTE REPORT**



- First, change the **QUOTE DATES**, this report specifically consists of the last **30 days**, so we set **FROM** and **THRU** dates to 30 days apart.

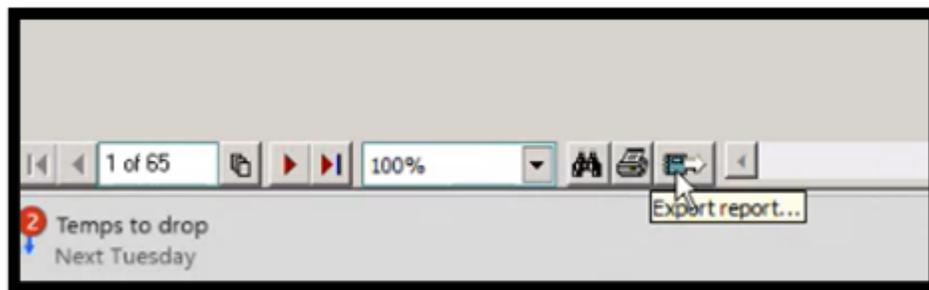
- You can also select which **MODULE** you'd like to run the report for, auto or flat, or you can do both.
- Once you've selected which module, click **OK** to run your report.
- Once your report is complete, it will automatically generate and populate on your screen and should look like the example below.

GLASS DOCTOR OF NORTH WEST FLORIDA  
Open Quote Report  
All Stores  
01/27/2025 thru 02/27/2025

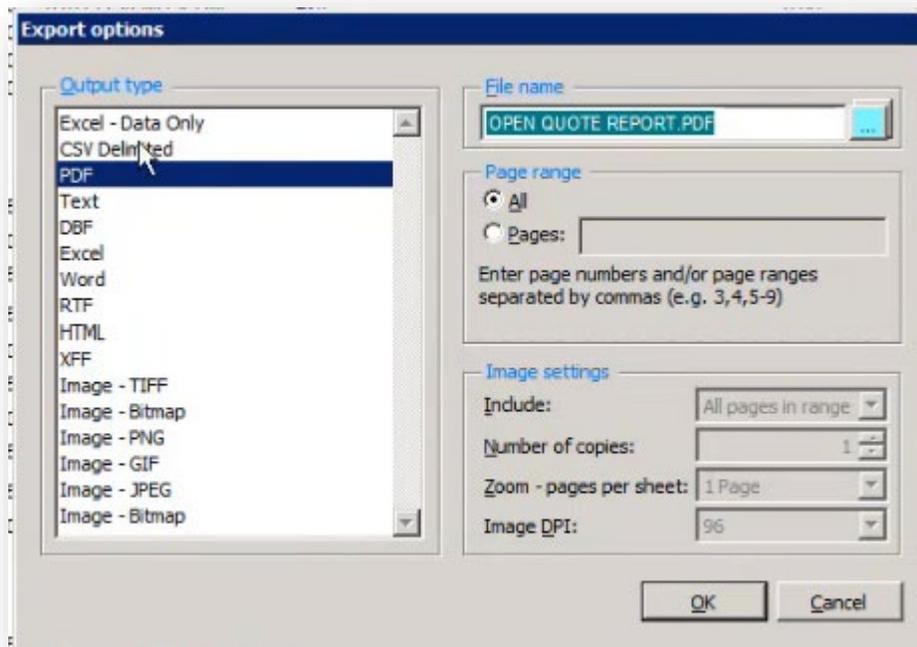
Date: 02/27/2025 15:36  
Ver. 9.2.1 Filters IDG.C...  
Page: 1

Quote Number	Quote Date	Customer Name/Bill To Name/Phone	Sales Tax	Material	Labor	Total
<b>1 GLASS DOCTOR OF NORTH WEST FLORIDA</b>						
<b>KELLY</b>						
1-179534	01/29/2025	EDWIN WATTS GOLF SHOP BILLY KITCH H:(850)477-4465 W:(850)477-4465	87.84	644.11	527.01	1258.96
1.00	-	INSANNCLR1* INSULATED UNITS CLEAR 1"ANN. IG 61" X		644.11	322.06	966.17
1.00	-	A-XSERVICECHARGE MISC FLAT x- s/c		0.00	190.00	190.00
1.00	-	ENERGY SURCHARGE... SURCHARGE		0.00	14.95	14.95
<b>1-180128 02/26/2025 RAY SLEETER H:(719)339-5465</b>						
1.00	-	1/16 PLEXI MUSEUM 4x8		0.00	0.00	0.00
1.00	-	1/16 PLEXI CONSERVAN 4x8		0.00	0.00	0.00
1.00	-	1/8 PLEXI MUSEUM 4x8		0.00	0.00	0.00
1.00	-	1/8 PLEXI CONSERVATN 4x8		0.00	0.00	0.00
<b>KELLY Totals:</b>			<b>2</b>	<b>87.84</b>	<b>644.11</b>	<b>527.01</b>
<b>DISPATCH DISPATCH</b>						

- To **EXPORT** report, click the **EXPORT ICON** at the bottom of the screen.



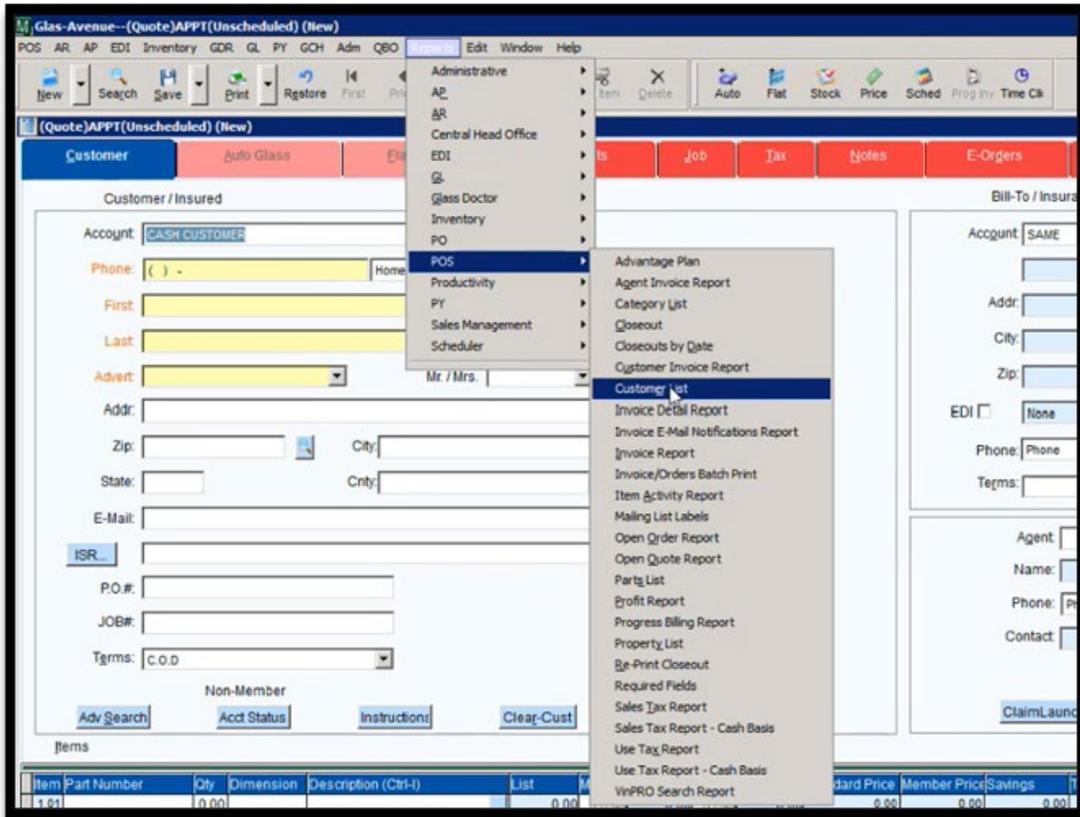
- Once the **EXPORT OPTIONS** menu has popped up, determine whether you'd like an **EXCEL SPREADSHEET**, which gives you the ability to filter and categorize columns and rows, or if you'd like to save it as a **PDF**.



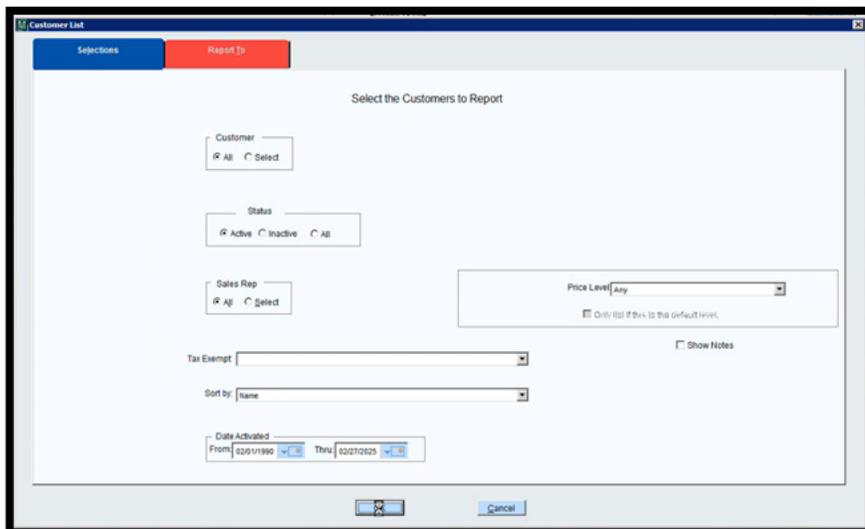
- Once you are done, click **OK** and save to your computer.

# Steps to Pull Customer List Report for Past Customer Scripting

1. Go to **Reports > POS > Customer List**



2. Once in the **Customer List**, set the dates from the **Date Activated** field and select the criteria for the report you would like to run and click **OK**.



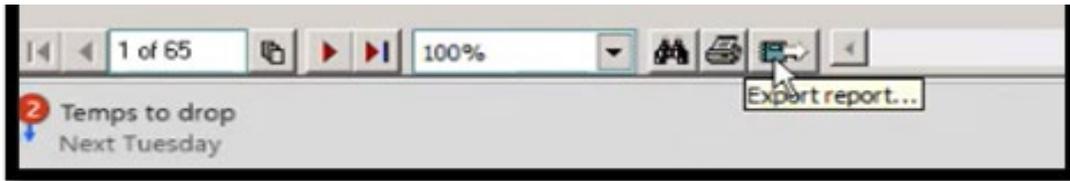
3. Once the report is complete it will generate and show on the Mainstreet page automatically. On the **Customer List report**, you should see:

- Customer name
- Address
- Term
- Payment status
- Fax number
- Contact name
- Phone number

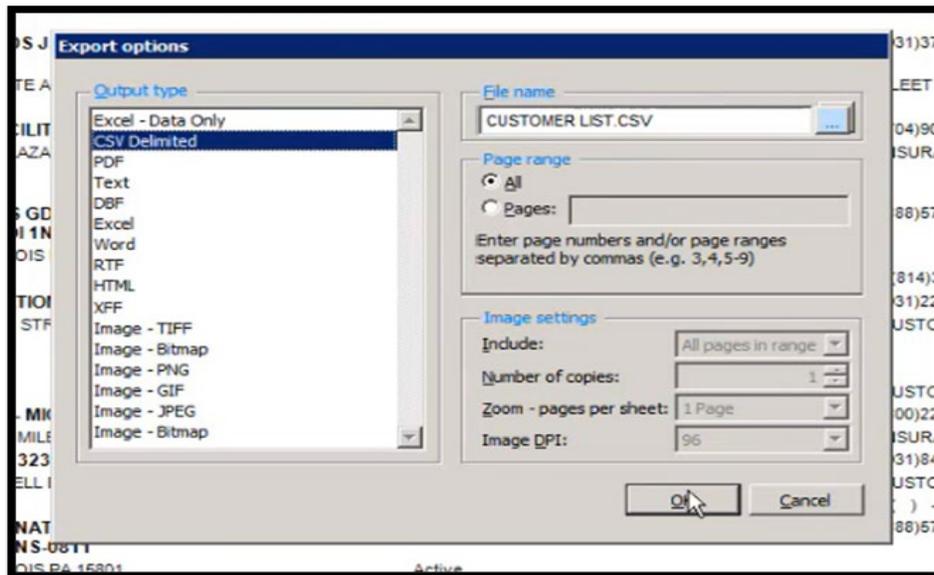
GLASS DOCTOR - COLUMBIA				Date:02/27/2025	08:25		
Customer List				Ver 9.2.10	MDG.C...		
Active				Page: 1			
All Sales Reps							
Customer Name	Taxes	Terms	Price-Code Status	Fax EDI Code	Rep	Contact / Affiliation	Phone Type
<b>BINSWINGER GLASS, LLC</b>		NET 30	CASH SHOP ONLY	(901)781-3254		SANDRA BULLOC	(800)366-9922
965 RIDGE LAKE BLVD. STE: 306 MEMPHIS TN 38120			Active				INSURANCE
Email glazing@binswingerglass.com							
<b>GROUP POTTSVILLE ASPHALT PLANT</b>		NET 30	CASH SHOP ONLY			TERRY LONG	(931)242-4981
646 HIGHWAY 99 LEWISBURG TN 37091			Active				CUSTOMER
Email terry.long@rogersgroupinc.com							
<b>MRCO - TACO BELL ATTN: AUSTIN MURPHY</b>		NET 30	CASH SHOP ONLY				
1728 GENRL GEORGE PATTON DR STE 200 BRENTWOOD TN 37027			Active				CUSTOMER
<b>ROBBIE D, WOODS J.R. (DALE) ROBERTS</b>		C.O.D	CASH SHOP ONLY			J.R. ROBERTS	(931)379-9642
POB 126 DOLOMITE AL 35061			Active				FLEET ACCOUNT
Cell (931)446-2385							
<b>23RD GROUP FACILITY SERVICES</b>		NET 30	CASH SHOP ONLY			DESIREE G	(704)908-4423
4944 PARKWAY PLAZA BOULEVARD SUITE0 CHARLOTTE NC 28217			Active				INSURANCE
Email VendorInvoices@23rdgroup.com							
<b>24 HOUR FITNESS GD NATIONAL ACCOUNT C/O UDI 1N-24HRFIT-1109</b>		NET 45	CASH SHOP ONLY	(814)375-9437		TRACI DECKER	(888)576-7898
PO BOX 1066 DUBOIS PA 15801			Active				
Email 24hourfitness@udiclaims.com						Cell (800)563-0831	OtherPh: (814)375-9437
<b>5 STAR RESTORATION</b>		NET 30	CASH SHOP ONLY			JOAN HARRIS	(931)223-5725
1011 SOUTH MAIN STREET COLUMBIA TN 38401			Active				CUSTOMER
Email jharris.5star@gmail.com						Cell ( ) -	
<b>9313885151</b>		NET 30	CASH SHOP ONLY				
			Active				CUSTOMER
<b>AAA INSURANCE - MICHIGAN A00009</b>		NET 30	CASH SHOP ONLY	( ) -			(800)222-6424
24101 WEST NINE MILE RD SOUTHFIELD MI 48034			Active				INSURANCE
<b>AARON SALES C1323</b>		NET 30	CASH SHOP ONLY	(931)840-8509		AARON	(931)840-8295
803 S JMS CAMPBELL BLVD COLUMBIA TN 38401			Active				CUSTOMER
Cell ( ) -						OtherPh: ( ) -	
<b>AARON'S INC GD NATIONAL ACCOUNT C/O UDI 1N-AARONS-0811</b>		NET 45	CASH SHOP ONLY	(814)375-9437		AR, TRACI DECKE	(888)576-7898
PO BOX 1066 DUBOIS PA 15801			Active				
Email aaronsjobs@udiclaims.com						Cell (800)563-0831	OtherPh: (814)503-1081
<b>AARON'S RENTAL</b>		NET 30	CASH SHOP ONLY	(866)496-8297		SHAWN	(878)402-3139
1016 COBB PLACE BLVD NW KENNESAW GA 30144			Active				INSURED
OtherPh: (878)402-3000							
<b>ACHIEVER PROPERTY MGMT</b>		NET 30	CASH SHOP ONLY	(931)489-0976		GINA SIMS	(931)489-2092
PO BOX 210098 NASHVILLE TN 37221			Active				CUSTOMER
Email gina.portroyal@yahoo.com							
<b>ACORN HILLS PREMIER REAL ESTATE MGMT</b>		NET 30	CASH SHOP ONLY	(931)422-5426		VALERIE	(931)270-0707
3120 GATEWAY RD BROOKFIELD WI 53046			Active				CUSTOMER
Email PAYABLE@PRE-3.COM						Cell (931)675-9673	OtherPh: ( ) -
<b>ACUITY INSURANCE</b>		NET 30	CASH SHOP ONLY	(888)890-9588			(800)242-7666
2800 S TAYLOR DR SHEBOYGAN WI 53081			Active				INSURANCE
<b>ADVANCE AUTO PARTS/CORP. OFFICE EVIDENCE PAYABLE DEPT</b>		NET 30	CASH SHOP ONLY	( ) -		DALE STONE	(540)362-4911



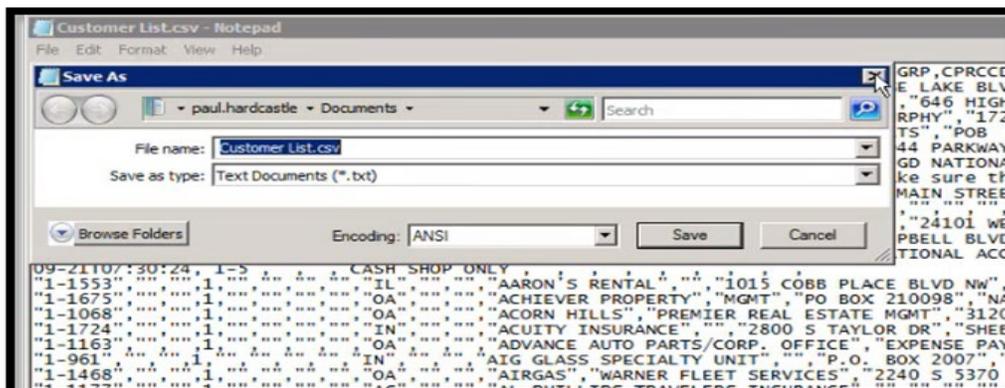
- Go to the **Export Icon** at the bottom of the screen to export customer list report.



- When exporting the Customer List report you should export as an Excel Spreadsheet, this will help when sorting columns and rows if needed.
- Once you have selected your **Output Type as CSV** (excel) click ok and save to computer.

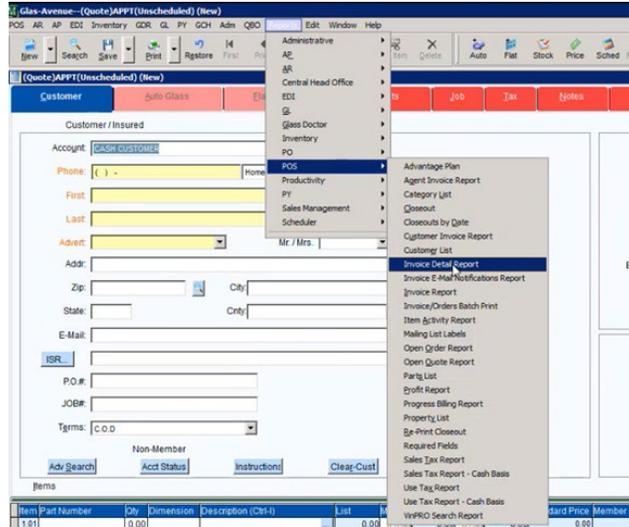


- A Notepad window will pop up, click on file, save as and save to computer.

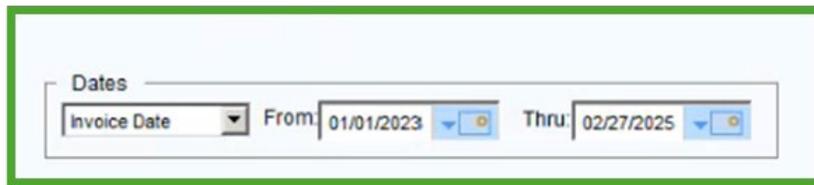


# Steps to Pull Invoice Data Report for Past Customer Lists

1. Go to **Report > POS > Invoice Detail Report**



2. Once you are in the **INVOICE DATA REPORT**, in the **Module** field, you can select the trade a report will generated for, either **Auto**, **Flat** or **Both**.
3. In the **Date** field you will see **From** and **Thru**. Set the date back **2 years** in the **FROM** column and the **THRU** date will stay the same.



4. Click **OK** to continue.

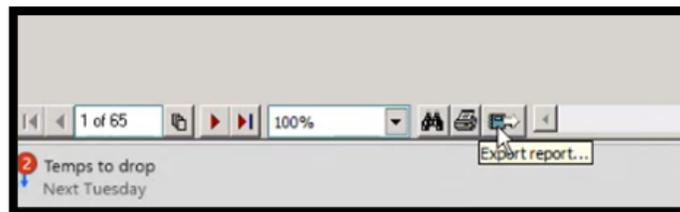
This report can take a few minutes, and once it has generated, it can be quite lengthy, so please be patient.

- Once the report is complete it will generate and show on the Mainstreet page automatically.

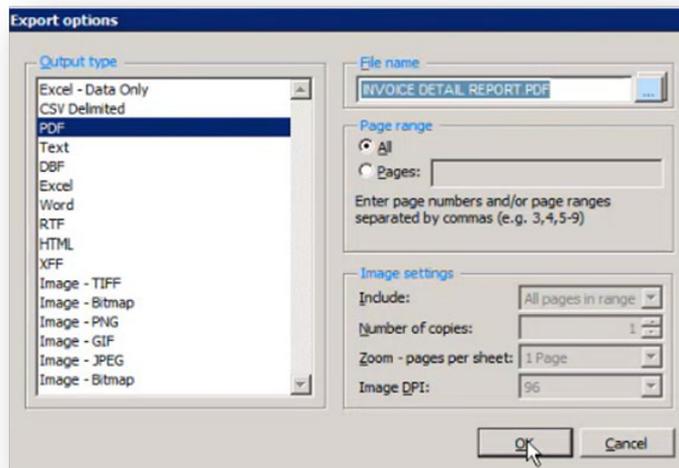
You will see Invoice number, customer name as well as whether it was a flat job or auto job.

GLASS DOCTOR - COLUMBIA				Date: 02/27/2025	08:27		
Invoice Detail Report				Ver: 9.2.10	MDG.C...		
All Stores				Page: 1			
01/01/2023 thru 02/27/2025							
By Invoice Date							
All							
Invoice Number	Invoice Date	Customer Name / BillTo Name	Claim / PO / Policy / RO	Sales Tax	Material	Labor	Total
<b>GLASS DOCTOR - COLUMBIA</b>							
1-78751	01/02/2023	BARROW BROWN		0.00	183.88	0.00	183.88
	Rep:	1.00 -IGU78CL	IGU ANH 31-18" X 30-14"		183.88	0.00	183.88
1-78836	01/02/2023	BRENT BEARD		24.80	204.34	50.00	279.14
	Rep:	2.00 -LEX14CL	LEXAN 1/4 CLEAR 27-3/4" X 41"		204.34	50.00	254.34
1-78837	01/02/2023	MARCUS WILSON		7.80	0.00	79.95	87.75
	Rep:	1.00 -WSREP1	WINDSHIELD REPAIRS REPAIR (SHOP) Windshield		0.00	79.95	79.95
1-78838	01/02/2023	LINDSAY WILLIAMS		7.80	0.00	79.95	87.75
	Rep:	1.00 -WSREP1	WINDSHIELD REPAIRS REPAIR (SHOP) Windshield		0.00	79.95	79.95
1-78870	01/03/2023	BRET MITCHELL		0.00	185.40	184.95	370.35
	Rep:	1.00 -IGU78CL	IGU ANH CLEAR 7/8 THICK, big house 22-7/8" X 15-7/8"		185.40	0.00	185.40
		1.00 -MSC	LABOR FOR INSTALLATION		0.00	185.00	185.00
		1.00 -EAF FEE	SURCHARGE FEE ENVIRONMENTAL AND FUEL		0.00	19.95	19.95
1-78728	01/03/2023	TERESA LO		1.96	218.67	164.95	386.67
	Rep:	1.00 -IGU78WHM	IGU ANH W/MUTTINS CLEAR 32 3/4 x 27 3/8		218.67	145.00	363.67
		1.00 -EAF FEE	SURCHARGE FEE ENVIRONMENTAL AND FUEL		0.00	19.95	19.95

- Click on the **Export icon** at the bottom of the screen to export the report.
- Notice the amount pages this report has, so please keep in mind that running and saving these reports will sometimes take several minutes so please be patient.



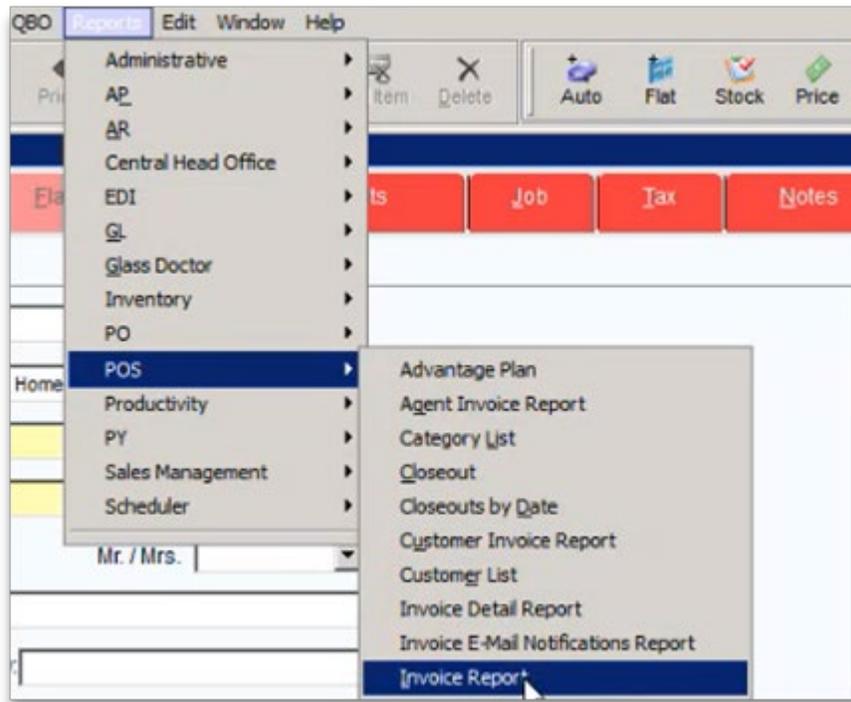
- Select your **Output Type** as a **PDF**, then click ok and save to computer.



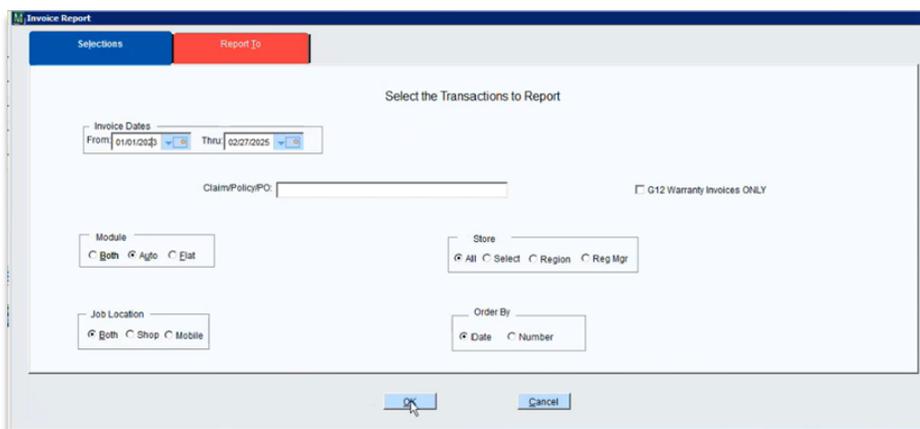
# Steps to Pull Invoice Report for Past Customers

If you do not run want to run a detailed report, you can run an Invoice Report.

1. Go to **Reports > POS > Invoice Report**



2. Choose your **Module**
3. In the **Date** field you will see **From** and **Thru**. Set the date back 2 years in the **FROM** column and the **THRU** date will stay the same.



Note: Selecting one service will narrow down your report criteria and shorten the amount of time it takes to run the report as it will be a smaller report.

You will notice the page numbers below, in running an invoice report the results have been narrowed down your page number amount isn't as extensive.

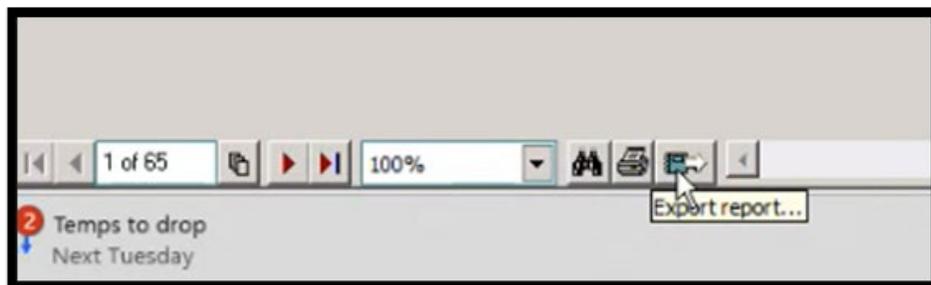
GLASS DOCTOR - COLUMBIA  
Invoice Report  
01/01/2023 thru 02/27/2025  
Auto

Date: 02/27/2025 08:32  
Ver: 9.2.10 Page: 1  
MDG.CORP

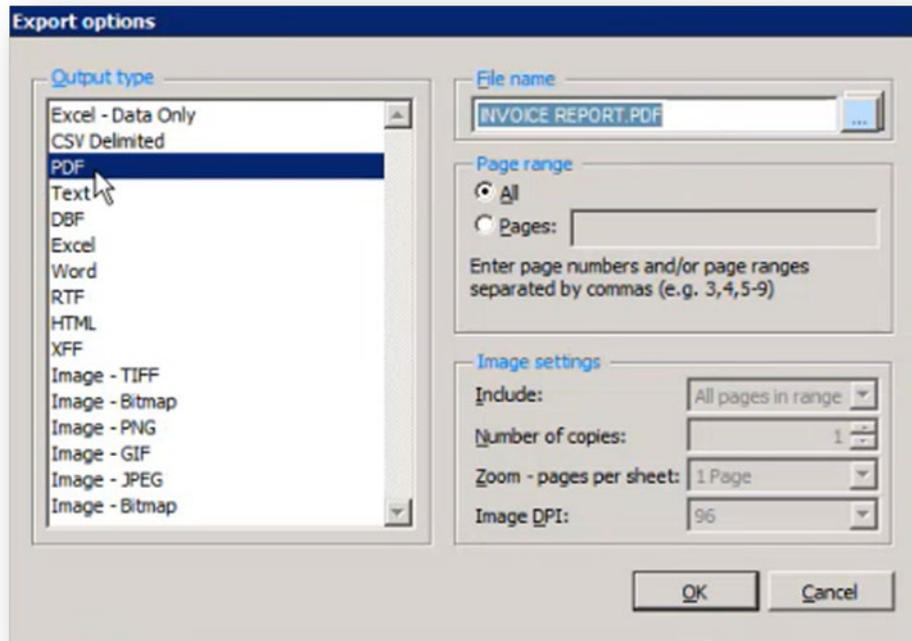
Invoice/ Invoice Orig # Date	Customer Name/Bill To Name/Agent Name/Ref	Sales Tax	Material	Labor	Total
1-76837 01/02/2023	MARCUS WILSON	7.80	0.00	79.95	87.75
1-76838 01/02/2023	LINDSAY WILLIAMS	7.80	0.00	79.95	87.75
1-76816 01/04/2023	ELISHA FLETCHER	36.93	243.75	135.00	415.68
1-76833 01/04/2023	Certificate 2002608 PAUL PUTNAM Shipper: 380040581	41.63	292.01	135.00	468.64
1-76834 01/04/2023	Certificate 2002609 ANTHONY GARRETT Shipper: 380056570	36.53	239.69	135.00	411.22
1-76835 01/04/2023	Certificate 2002607 SHANNON MCCLURE	26.62	166.59	135.00	322.21
1-76841 01/05/2023	Certificate 2002610 ANNETTE MCCLAUGHLIN Shipper: 380064052	72.06	604.11	135.00	911.17
1-76850 01/05/2023	CHIP REPAIR	7.80	0.00	79.95	87.75
1-76852 01/05/2023	CHIP REPAIR	7.80	0.00	79.95	87.75
1-76855 01/06/2023	BRIAN ROWELL	31.96	172.84	154.95	359.75
1-76856 01/06/2023	CHIP REPAIR	7.80	0.00	79.95	87.75
1-76856 01/06/2023	CHIP REPAIR	7.80	0.00	79.95	87.75
1-76859 01/06/2023	CHIP REPAIR	7.80	0.00	79.95	87.75
1-76840 01/07/2023	DANNY JACKSON	82.93	620.53	230.00	933.46
1-76839 01/09/2023	Certificate 2002611 MCKENZIE WRIGHT SAFELITE/GEICO - EDI Shipper: s55705891	30.87	180.60	136.00	347.47
1-76854 01/09/2023	Certificate 2002612 JOEY RAMIREZ Shipper: 380080307	10.24	106.00	0.00	116.24
1-76864 01/09/2023	CHRIS BROWN	29.97	172.43	135.00	337.40
1-76872 01/09/2023	SHERYL GENDREAU ERIE INSURANCE	7.31	0.00	75.00	82.31
1-76853 01/10/2023	PATRICIA PRENTICE SAFELITE/PROGRESSIVE - EDI	38.07	242.51	148.00	428.58
1-76859 01/10/2023	JAMES DAVIS	44.74	323.87	135.00	503.61
1-76870 01/10/2023	Certificate 2002614 SAMUEL THURMOND SAFELITE/PROGRESSIVE - EDI Shipper: s55750324	54.85	430.55	132.00	617.40
1-76862 01/10/2023	Certificate 2002613 CHIP REPAIR Shipper: 380090718	9.26	0.00	94.95	104.21
1-76865 01/10/2023	CHRIS BADE	7.80	0.00	79.95	87.75
1-76888 01/12/2023	PEGGY ROMANO	46.96	342.99	135.00	524.95
1-76895 01/12/2023	Certificate 2002615 GRAY'S Shipper: S55815964	32.20	175.29	154.95	362.44
1-76897 01/12/2023	Certificate 2002616 SMITH CONSTRUCTORS, INC Shipper: 5301375144	0.00	306.90	115.00	421.90
1-76890 01/13/2023	MARK BOLT	80.94	695.18	135.00	911.12
1-76893 01/13/2023	Certificate 2002617 TRACOR STORE Shipper: s55840474	50.40	381.90	135.00	567.30
1-76898 01/13/2023	TAMMY MOBLEY	37.54	250.00	135.00	422.54
1-76913 01/13/2023	JONITA FARRIS	7.80	0.00	79.95	87.75
1-76914 01/16/2023	TYCEN BUCHANAN SAFELITE/METROPOLITAN	60.77	488.43	134.85	684.05
1-76915 01/16/2023	Certificate 2002618 WILLIAM HARGROVE STATE FARM LYNX - EDI Shipper: 380119816 Claim: 606149821	44.46	354.81	101.20	500.47
1-76923 01/16/2023	Certificate 2002619 JAUN RONDAN Shipper: 380120795	29.55	168.13	135.00	332.68
1-76922 01/17/2023	MISTY CASTEEL PROGRESSIVE INSURANCE EDI	43.95	354.79	96.00	494.74
1-76927 01/17/2023	Certificate 2002620 CONNIE Shipper: 5301375522	38.21	256.90	135.00	430.11
1-76931 01/17/2023	Certificate 2002621 COREY STRAHN STATE FARM LYNX - EDI Shipper: 5301375566 Claim: 606247947	64.35	556.04	104.00	724.39
1-76910 01/18/2023	Certificate 2002621 BROCK TALLEY Shipper: 380130611	32.95	188.84	135.00	356.39

1 of 47 100% Export report...

- Go to the **Export Icon** at the bottom of the screen to export customer list report.



5. When exporting the **INVOICE REPORT** you should export as an Excel Spreadsheet, this will help when sorting columns and rows if needed.
6. Once you have selected your **Output Type as CSV** (excel) click ok and save to computer.



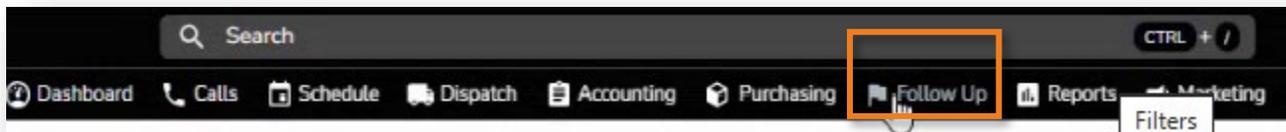
# Gather Your List ServiceTitan POS

## Steps to Pull your Unsold Estimates/Leads and Past Customer Contacts

We have provided a detailed, easy step-by-step process for exporting unsold leads/estimates and past customer list from our Point-of-Sale (POS) system. If you have any questions as you follow the next few pages, please direct your questions to Keely Collette at [keely.collette@nbly.com](mailto:keely.collette@nbly.com) or by phone at 704.323.5143.

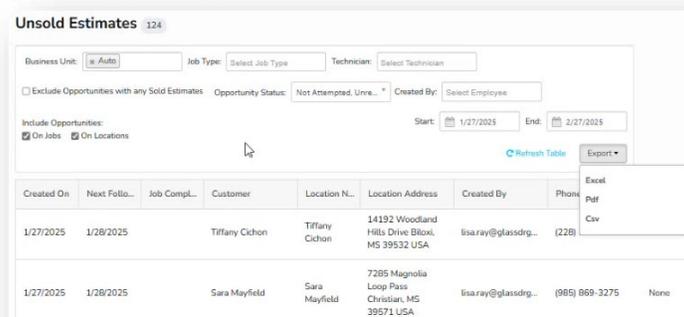
### Pull your Unsold Estimates/Leads

1. Go to **FOLLOW UP** screen from the menu bar



### AUTO GLASS

2. Select **Business Unit > AUTO >** Change your **Date Range**
3. **Service Titan** will automatically generate all customer jobs that have an open estimate not yet sold or converted.
4. Click **REFRESH TABLE** to upload or update the current display of information.
5. Click on **EXPORT** and choose EXCEL from the DROP DOWN to download as an Excel file.



Unsold Estimates 124

Business Unit:  Job Type:  Technician:

Exclude Opportunities with any Sold Estimates Opportunity Status:  Created By:

Include Opportunities:  
 On Jobs  On Locations

Start:  End:

Created On	Next Follo...	Job Compl...	Customer	Location N...	Location Address	Created By	Phone
1/27/2025	1/28/2025		Tiffany Cichon	Tiffany Cichon	14192 Woodland Hills Drive Biloxi, MS 39532 USA	isa.ray@glassdrg...	(228)
1/27/2025	1/28/2025		Sara Mayfield	Sara Mayfield	7285 Magnolia Loop Pass Christian, MS 39571 USA	isa.ray@glassdrg...	(985) 869-3275 None

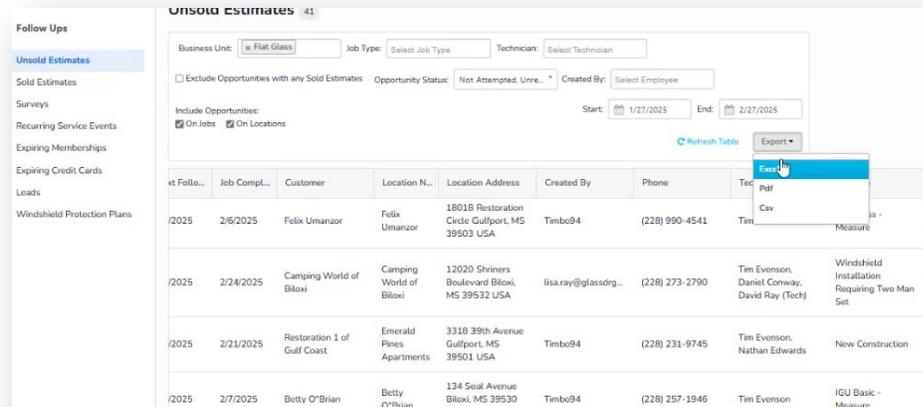


6. Once you have downloaded your **OPEN ESTIMATE REPORT**, it should look like the image below with the following rows and columns.
7. These rows and columns can be organized to your needs.
8. Target those that have not been converted, export file and sort these by the highest value.

A	B	C	D	E	F	H	I	J	K	L
Created On	Next Follow Up Date	Job Completion Date	Customer	Location Name	Location Address	Phone	Technician	Highest Estimate Value	Opportunity Status	Last Follow Up
1/27/2025	1/28/2025		Sean Givens	Sean Givens	13680 Lawton Lane Gulfport, MS 39503 USA	(228) 257-5669	None	\$ 426.10	NotAttempted	
1/16/2025	1/29/2025	2/5/2025	Ryan Romero	Ryan Romero	305 Texas Avenue Gulfport, MS 39507 USA 84140 Lola Drive Diamondhead, MS 39525 USA	(228) 233-6486	Tim Evenson, David Ray (Tech)	\$ 1,722.22	NotAttempted	
1/24/2025	1/29/2025	1/27/2025	Maureen Vitello	Maureen Vitello	2533 Bryn Mawr Avenue Biloxi, MS 39531 USA	(228) 332-1411	David Ray (Tech)	\$ 3,681.02	NotAttempted	
1/27/2025	1/29/2025	1/27/2025	Shanell Ellis	Shanell Ellis	Pass Christian MS 3957 Pass Christian, MS 39571 USA	(901) 827-0308	None	\$ 2,432.24	NotAttempted	
1/29/2025	1/30/2025		Susan Mearns	Susan Mearns	300 North Cleveland Avenue Long Beach, MS 39560 USA 105 Callaway Street Biloxi, MS 39530 USA	(228) 669-2417	David Ray (Tech)	\$ 0.00	NotAttempted	
1/28/2025	2/1/2025	2/11/2025	Shuckers Baseball LLC	Shuckers Baseball LLC	2406 CAMINO GRANDE ST GAUTIER, MS 39553 716 West Lakeshore Drive Carriere, MS 39426 USA 15309 Overlook Drive Gulfport, MS 39503 USA	(228) 233-3465	Tim Evenson	\$ 1,448.82	NotAttempted	
1/30/2025	2/1/2025	1/30/2025	Joe McKines	Joe McKines	22120 Pine Haven Saucier, MS 39574 USA 12528 Westwood Place Gulfport, MS 39503 USA	(228) 327-4107	Tim Evenson	\$ 426.10	NotAttempted	
1/31/2025	2/5/2025	2/3/2025	Kurt Kienitz	Kurt Kienitz	4401 West Railroad Street Gulfport, MS 39501 USA 10393 U.S. 49 Gulfport, MS 39503 USA	(504) 202-2352	David Ray (Tech)	\$ 4,325.85	NotAttempted	
1/31/2025	2/5/2025	2/3/2025	Chad Kissinger	Chad Kissinger	22120 Pine Haven Saucier, MS 39574 USA 12528 Westwood Place Gulfport, MS 39503 USA	(228) 229-0961	Tim Evenson	\$ 1,242.97	NotAttempted	
2/2/2025	2/5/2025	2/3/2025	Colby Jones	Colby Jones	4401 West Railroad Street Gulfport, MS 39501 USA 10393 U.S. 49 Gulfport, MS 39503 USA	(228) 265-2525	Tim Evenson	\$ 595.10	NotAttempted	
2/4/2025	2/5/2025		Pat McShane	Pat McShane	107 Church Street Long Beach, MS 39560 USA	(559) 631-3189	None	\$ 426.10	NotAttempted	
2/3/2025	2/6/2025	2/5/2025	Southern Prosthetic Care	Southern Prosthetic Care		(228) 265-7847	Tim Evenson	\$ 1,033.49	NotAttempted	
2/4/2025	2/7/2025	2/6/2025	Sleep Inn & Suites	Sleep Inn & Suites		(228) 831-1616	Tim Evenson	\$ 1,185.23	NotAttempted	
2/5/2025	2/7/2025	2/6/2025	Craig Stallings	Craig Stallings		(214) 732-8241	Tim Evenson	\$ 1,786.07	NotAttempted	

# FLAT GLASS

1. To run a report for **FLAT** glass, you would follow the same steps but in your business unit you would type in or select **FLAT**.
2. Select **Business Unit > FLAT > Change your Date Range**.
3. **Service Titan** will automatically generate all customer jobs that have an open estimate not yet sold or converted.



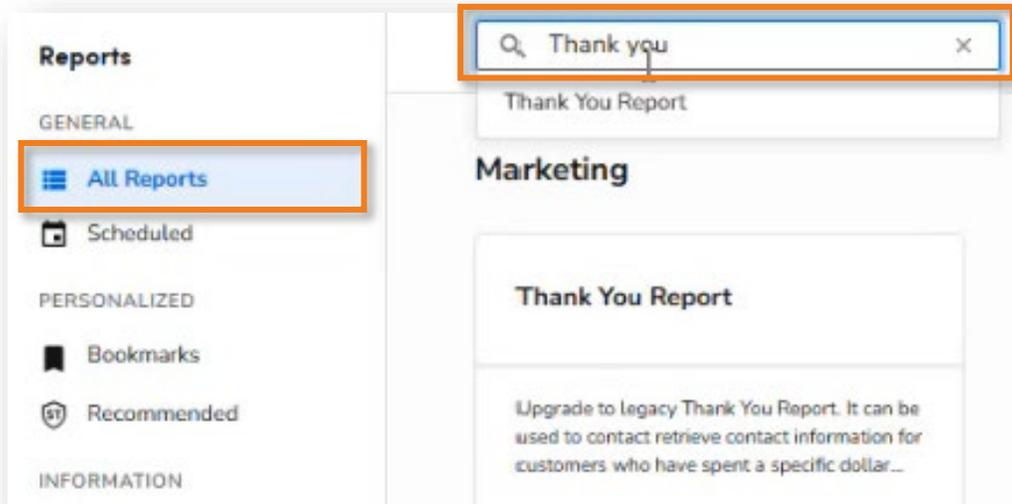
4. Click **REFRESH TABLE** to upload or update the current display of information.
5. Click on **EXPORT** and choose **EXCEL** from the DROP DOWN to download as an excel file.
6. Once you have downloaded your **OPEN ESTIMATE REPORT**, it should look like the image below with the following rows and columns.
7. These rows and columns can be organized to your needs, a recommendation would be maybe start with the highest valued estimate.

Created On	Next Follow Up Date	Job Completion Date	Customer	Location Name	Location Address	Phone	Technician	Highest Estimate Value	Opportunity Status	Last Follow Up
1/27/2025	1/28/2025		Sean Givens	Sean Givens	13801 Canton Lane Gulfport, MS 39503 USA	(228) 257-5669	None	\$	426.10	NotAttempted
1/16/2025	1/29/2025	2/5/2025	Ryan Romero	Ryan Romero	305 Texas Avenue Gulfport, MS 39507 USA	(228) 233-6486	Tim Evenson, David Ray (Tech)	\$	1,722.22	NotAttempted
1/24/2025	1/29/2025	1/27/2025	Maureen Vitello	Maureen Vitello	8438 Lida Drive Diamond Springs, MS 39525 USA	(228) 332-1411	David Ray (Tech)	\$	3,681.02	NotAttempted
1/27/2025	1/29/2025	1/27/2025	Shanell Ellis	Shanell Ellis	2528 Bryn Maur Avenue Biloxi, MS 39531 USA	(504) 313-7994	Tim Evenson	\$	426.10	NotAttempted
1/29/2025	1/30/2025		Susan Mearns	Susan Mearns	Pass Christian MS 3957 Pass Christian, MS 39571 USA	(901) 827-0308	None	\$	2,432.24	NotAttempted
1/24/2025	1/30/2025	1/29/2025	Suzi Johnson	Suzi Johnson	300 North Cleveland Avenue Long Beach, MS 39560 USA	(228) 669-3417	David Ray (Tech)	\$	0.00	NotAttempted
1/28/2025	2/1/2025	2/11/2025	Shuckers Baseball LLC	Shuckers Baseball LLC	105 Callilavet Street Biloxi, MS 39530 USA	(228) 233-3465	Tim Evenson	\$	1,448.82	NotAttempted
1/30/2025	2/1/2025	1/30/2025	Joe McKines	Joe McKines	2408 CARMINO GRANDE ST GAUTIER, MS 39533	(228) 327-4107	Tim Evenson	\$	426.10	NotAttempted
1/31/2025	2/5/2025	2/3/2025	Kurt Kienitz	Kurt Kienitz	716 West Lakeshore Drive Carnegie, MS 39426 USA	(504) 202-2352	David Ray (Tech)	\$	4,325.85	NotAttempted
1/31/2025	2/5/2025	2/3/2025	Chad Kissingner	Chad Kissingner	15309 Overlook Drive Gulfport, MS 39503 USA	(228) 229-0961	Tim Evenson	\$	1,242.97	NotAttempted
2/3/2025	2/5/2025	2/3/2025	Colby Jones	Colby Jones	22120 Pine Haven Saucier, MS 39574 USA	(228) 265-2525	Tim Evenson	\$	595.10	NotAttempted
2/4/2025	2/5/2025		Pat McShane	Pat McShane	12528 Westwood Place Gulfport, MS 39503 USA	(559) 631-3189	None	\$	426.10	NotAttempted
2/3/2025	2/6/2025	2/5/2025	Southern Prosthetic Care	Southern Prosthetic Care	4401 West Railroad Street Gulfport, MS 39501 USA	(228) 265-7847	Tim Evenson	\$	1,033.49	NotAttempted
2/4/2025	2/7/2025	2/6/2025	Sleep Inn & Suites	Sleep Inn & Suites	10393 U.S. 49 Gulfport, MS 39503 USA	(228) 631-1816	Tim Evenson	\$	1,185.23	NotAttempted
2/5/2025	2/7/2025	2/6/2025	Craig Stallings	Craig Stallings	107 Church Street Long Beach, MS 39560 USA	(224) 732-8241	Tim Evenson	\$	1,786.07	NotAttempted

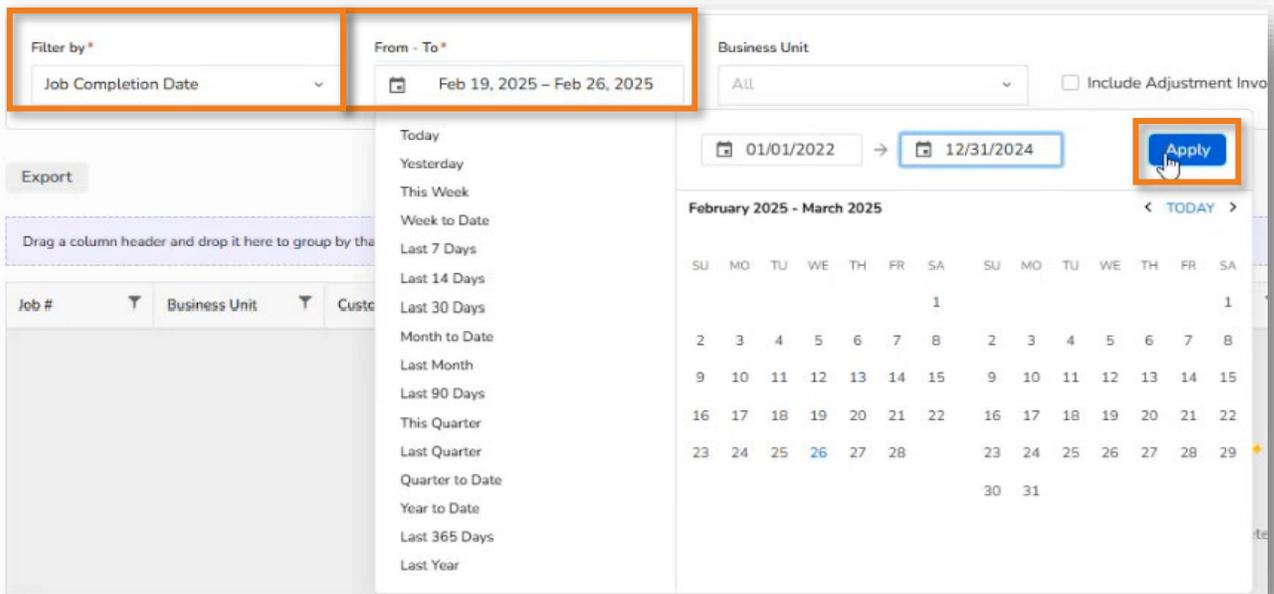


# Steps to Pull Past Customer List

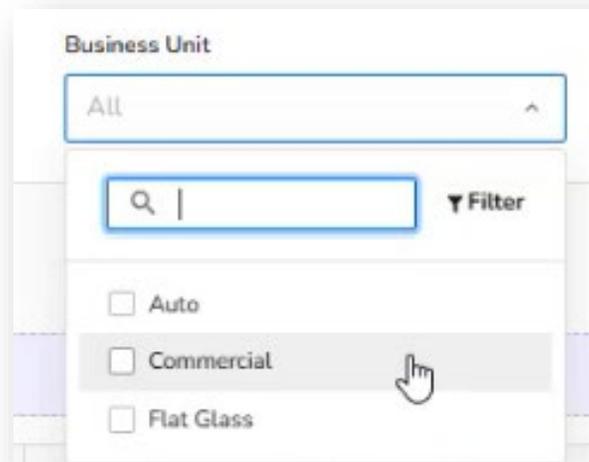
1. Go to **Reports > All Reports > Search > Thank You Report**



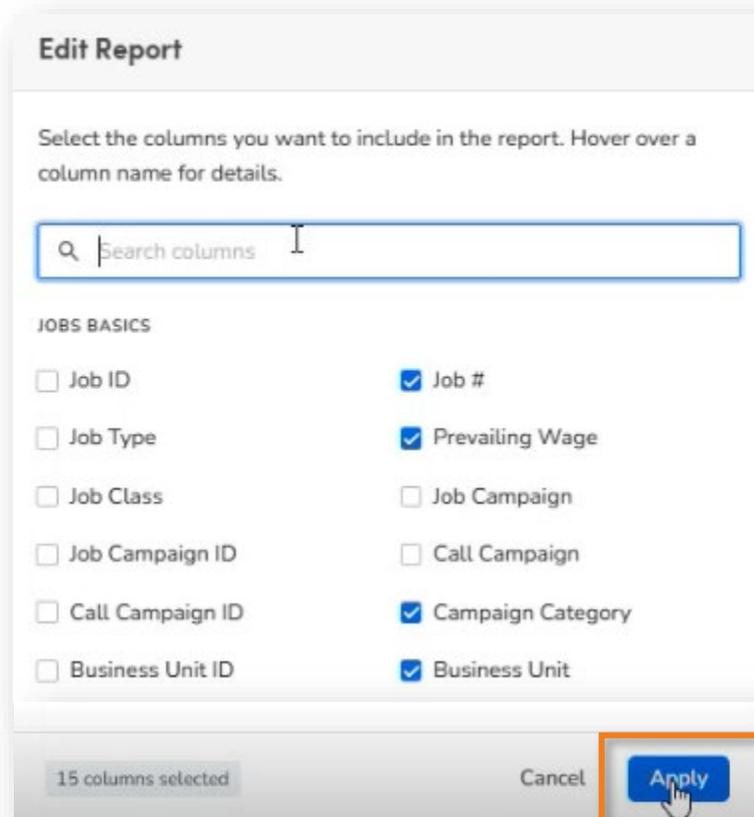
2. Filter by **Job Completion Date > From to: 01/01/22 - 12/31/24 > Business Units All > Apply**



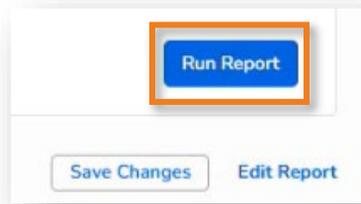
**Optional:** In selecting the **Business Unit**, the optional to run the report for a specific campaign is available or you can select all.



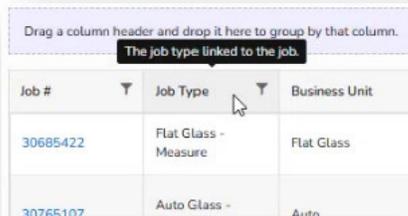
3. Next, go to **EDIT REPORT** on the right-hand side. You will see preselected job basics already checked, search or select **JOB TYPE** > click **APPLY** to continue.



- Once **JOB TYPE** selected and clicked **APPLY**, click on **RUN REPORT**.

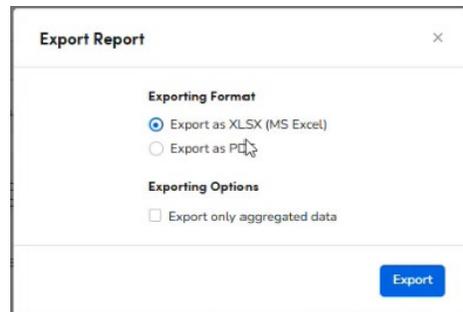


- From here you have the ability to sort by job type and other criteria as well as filter alphabetically.

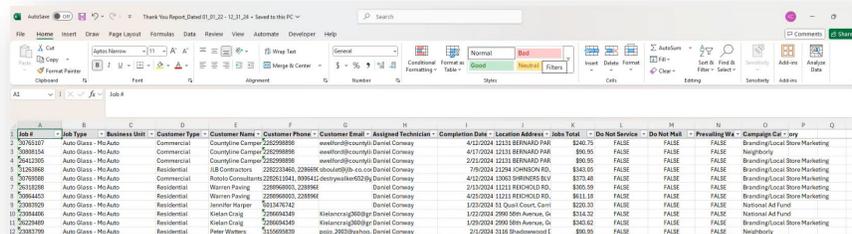


*We recommend skipping to the last page to double check that everything is in order according to the filter option(s) you selected.*

- Click on **EXPORT** on the left-hand side, save as an **EXCEL SPREADSHEET** as this will give the ability to sort columns and rows as needed. Click **EXPORT** to download.



- Once it has downloaded, open **EXCEL** file up and now you have **CUSTOMER LIST** spreadsheet with job type, name, phone, total amount, etc.



# Unsold Estimates/Leads Call Scripts Overview - Flat (H&B)

We have provided you recommended outbound call script ideas with key messaging to be used during the *Call Blitz*. Your final script should be clear, compelling, and aligned with our brand voice. Consider including urgency, exclusivity, and personalization to offer the best chance of booking a new service or appointment.

**Tone:** Thankful, humble, relational

## Key Conversation Points:

- Glass Doctor is making offers based on the most common needs we are hearing from our friends and neighbors.
- Glass doesn't fix itself.
- One of our goals for the year is to turn regular customers into raving fans.
- We have a couple of Spring Specials we would like to offer.
- We really appreciate you trusting Glass Doctor with your business.
- With the damage that winter causes we are reaching out to see if we can help with any glass projects that may have been deferred over the winter.
- Thank you for being a great customer and part of the Glass Doctor family.
- Winter is tough on glass. From moisture and water damage to foggy windows, sticky sashes, and cracking glass, you may have some spring projects on the horizon.

## Spring Specials through April:

- \$200 of custom glass shower enclosures valued at \$1000 or more existing clients
- \$50 of window repair of \$250 or more existing clients
- 10% of all other new projects and repairs when you say "It's a Spring Thing"
- One free can of glass cleaner to any existing customer who stops by the shop this month.



# Unsold Estimates/Leads Script Ideas - Flat (H&B)

## Call Script:

Hello, Mr./Ms. [Name]! This is \_\_\_\_\_ from Glass Doctor.  
Since our last conversation, we have begun a new seasonal campaign called "Spring Thing", which will save you some money on the project we looked at with you before. May I tell you about that savings?

### **If the issue is custom glass enclosures:**

- We are able to offer you \$200 off your custom glass shower, bringing the new total to only \_\_\_\_\_.

### **If the issue is window repair:**

- We are able to offer you \$50 off the window repair, bringing your new total to only \_\_\_\_\_, and we could get that taken care of you by \_\_\_\_\_.

### **If the issue is other new projects and repairs:**

- We are able to offer you 10% off all projects and repairs that we quoted before, as long as we get them scheduled during Spring Thing.

And, to top it all off, we are giving away one free can of glass cleaner to any existing customer who stops by the shop this month and says, "Spring Thing."

I am excited to pass these savings on to you. When would you like us to get started?

# Unsold Estimates/Leads Script Ideas - Flat (H&B)

## Voicemail Script:

Hello, Mr./Ms. [Name]! This is \_\_\_\_\_ from Glass Doctor. Since our last conversation, we have begun a new seasonal campaign called "Spring Thing", which will save you some money on the project we looked at with you before.

If the issue is custom glass enclosures:

- We are able to offer you \$200 off your custom glass shower, bringing the new total to only \_\_\_\_\_.

If the issue is window repair:

- We are able to offer you \$50 off the window repair, bringing your new total to only \_\_\_\_\_, and we could get that taken care of you by \_\_\_\_\_.

If the issue is other new projects and repairs:

- We are able to offer you 10% off all projects and repairs that we quoted before, as long as we get them scheduled during Spring Thing.

And, to top it all off, we are giving away one free can of glass cleaner to any existing customer who stops by the shop this month and says, "Spring Thing."

I am excited to pass these savings on to you. Please return my call at XXX-XXX-XXXX and let me know when we can get started.

# Unsold Estimates/Leads Call Scripts Overview - Auto

**Tone:** Thankful, humble, relational

## Key Conversation Points:

- Thank you for being a great customer and part of the Glass Doctor family.
- Are you ready for spring? Is your windshield ready?
- Winter is brutal on your car's glass. Studies have shown that 80% of auto glass cracks come from expanding chips we get in the winter. From sudden temperature changes to frost heaving, your car's glass could use a spring check up!
- You may have noticed that your windshield is difficult to see through. Get that clear view back on your windshield with Glass Doctor's Hydrophobic Coating. Nothing repels April showers like a clear view from your windshield.

## Spring Specials through April:

- \$50 in shop chip repairs for your windshield to make sure those chips do not turn into cracks
- \$50 hydrophobic coating for existing clients
- \$30 windshield wipers replacement

*And, as always, whenever you choose The Glass Doctor, we will clean your windshield for free and give you a free can of the best glass cleaner anywhere.*



# Unsold Estimates/Leads Call Scripts Overview - Auto (cont'd)

## Call Script:

Hello, Poly Car Owner! This is \_\_\_\_\_ from Glass Doctor. I wanted to give you a call back and see if you found a solution for your note specific auto glass need since we spoke on \_\_\_\_\_?

-----if NO-----

That's good to hear because we are entering into Spring Thing campaign for March and April, which will let us save you some money on that job we talked about before.

### **IF chip repairs was the need:**

- We can offer you \$50 in-shop chip repairs for your windshield to make sure those chips do not turn into cracks .

### **IF windshield needs to be replaced:**

- We are offering \$50 off in-shop windshield replacement during March and April.

### **IF hazy windshield, can't get it clean or glare in the sun is mentioned:**

- \$50 hydrophobic coating, which repels water and restores the clarity that winter often robs you of

With ALL windshield repairs and replacements: We are offering \$30 windshield wipers replacement here in the shop to make sure you have a safe, clear view of the upcoming Spring season.

And, to top it all off, we are giving away one free can of glass cleaner to any existing customer who stops by the shop this month and says, Spring Thing.

Would these savings and the quality of our work will help us to earn your business today?



# Unsold Estimates/Leads Call Scripts Overview - Auto (cont'd)

## **Voicemail Script:**

Hello, Poly Car Owner! This is \_\_\_\_\_ from Glass Doctor. I wanted to give you a call back and ask if you found a solution for your auto glass need since we spoke on \_\_\_\_\_.

In case you have not gotten it fixed yet, I want to let you know that we are entering into our "Spring Thing" campaign for March and April, which will let us save you some money on that job we talked about before.

## **IF chips repair was the need:**

- We can offer you \$50 in shop chip repairs for your windshield to make sure those chips do not turn into cracks .

## **IF windshield needs to be replaced:**

- We are offering \$50 of in-shop windshield replacement during March and April.

With ALL windshield repairs and replacements: We are offering \$30 windshield wipers replacement here in the shop to make sure you have a safe, clear view of the upcoming Spring season.

And, to top it all off, we are giving away one free can of glass cleaner to any existing customer who stops by the shop this month and says, "Spring Thing."

I hope you will give me a call back at \_\_\_\_\_ and let me know when we can get started. We would really appreciate the chance to impress you.



# Past Customer Call Scripts Overview - Comm Accts (H&B)

**Tone:** Thankful, relational

## **Key Conversation Points:**

- Thank you for being a great client and an important part of our business.
- For our best commercial customers, we are trying to get ahead of some of the seasonal maintenance work that is right around the corner.
- To make this seasonal transition easy for you, we would like to collaborate on a project plan. That way, you will not be blindsided by the unexpected and hopefully, work that used to seem urgent will be well-anticipated.
- Can you look at your calendar so we can schedule a day for us to come out and look over the complex/facility before things get busy?

# Past Customers Script Ideas- Comm Accts (H&B)

## Call Script:

Good [morning,afternoon] Peter property manager,

This is \_\_\_\_\_ over at Glass Doctor. I'm reaching out to say "Thank You" for being an important part of our business and see if you have any needs we can meet for you as Spring rolls around.

(For apartments/student housing: You know as well as we do that "turns" and moves are coming soon, and the timelines get short in a hurry).

### -----if they are open to discuss-----

For our commercial customers, we are trying to get ahead of some of the seasonal maintenance work that is right around the corner.

To make this easy for you, we would like to collaborate on a free exterior site inspection. That way, you will not be blindsided by the unexpected.

Hopefully, work that used to seem urgent will be well-anticipated.

Can you look at your calendar so we can schedule a day for us to come out and look over the complex/facility before things get busy?

### -----if they are NOT open to discuss-----

OK, I understand. Just know we appreciate being your go-to source for glass work and are always a phone call away.

## Voicemail Script:

Hello, this is [Your Name] from Glass Doctor.

I just wanted to say *thank you* for being an important part of our business and check if you have any glass needs as spring approaches.

For our commercial customers, we're offering free exterior site inspections to help you stay ahead of seasonal maintenance—no surprises, no last-minute stress.

If you'd like to schedule a visit, give us a call at [Your Phone Number].

Otherwise, just know we appreciate you and are always here when you need us.

Thanks, and have a great day!



# Past Customer Call Scripts Overview- Flat (H&B)

**Tone:** Thankful, humble, relational

## Key Conversation Points:

- Glass Doctor is making offers based on the most common needs we are hearing from our friends and neighbors.
- Glass doesn't fix itself.
- One of our goals for the year is to turn regular customers into raving fans.
- We have a couple of Spring Specials we would like to offer.
- We really appreciate you trusting Glass Doctor with your business.
- With the damage that winter causes we are reaching out to see if we can help with any glass projects that may have been deferred over the winter.
- Thank you for being a great customer and part of the Glass Doctor family.
- Winter is tough on glass. From moisture and water damage to foggy windows, sticky sashes, and cracking glass, you may have some spring projects on the horizon.

## Spring Specials through April:

- \$200 of custom glass shower enclosures valued at \$1000 or more existing clients
- \$50 of window repair of \$250 or more existing clients
- 10% of all other new projects and repairs when you say "*It's a Spring Thing*"
- One free can of glass cleaner to any existing customer who stops by the shop this month.



# Past Customer Script Ideas- Flat (H&B)

## Call Script:

Hi Polly Homeowner, this is Rachel with Glass Doctor. I am reaching out to all the clients we have served over this past couple of years to say THANK YOU for choosing Glass Doctor to fix your panes. We never take your trust for granted.

Winter is tough on glass. From moisture and water damage to foggy windows, sticky sashes, and cracking glass, you may have some spring projects on the horizon. Does any of that sound familiar to you?

### -----if YES-----

Tell me a little bit more about that.

Great timing then: Glass Doctor is making a few special offers based on the most common needs we are hearing from our friends and neighbors and calling this our "Spring Thing". Based on what you just mentioned we are offering:

#### **If the issue is custom glass enclosures:**

- o \$200 off custom glass shower enclosures valued at \$1000 or more

#### **If the issue is window repair:**

- o \$50 off window repair of \$250 or more

#### **If the issue is other new projects and repairs:**

- o 10% off all other new projects and repairs
- o And, to top it all off, One free can of glass cleaner to any existing customer who stops by the shop this month and says, "Spring Thing."

Let's schedule a visit to assess the scope of the work you may need done and provide an estimate, which would include the discounts I mentioned before. How does that sound to you?

Proceed to scheduling a visit in POS.

### -----If No -----

Fair enough. Let me just say THANK YOU for choosing Glass Doctor to fix your panes in the past. We never take your trust for granted. Have a great day, Polly Homeowner.



# Past Customer Script Ideas-Flat (H&B) (cont'd)

## **Voicemail Script:**

Hi Polly Homeowner, this is Rachel with Glass Doctor. I'm calling to say thank you for choosing us in the past. We really appreciate your trust.

With winter behind us, you might be noticing some glass issues like foggy windows, sticky sashes, or even cracked panes. If any of that sounds familiar, we have a special 'Spring Thing' promotion just for our valued customers.

We're offering:

- \$200 off custom glass shower enclosures of \$1000 or more.
- \$50 off window repairs of \$250 or more.
- And 10% off all other new projects and repairs.

Plus, stop by our shop this month and mention 'Spring Thing' for a free can of glass cleaner.

If you're interested, please call me back at [Your Phone Number]. Again, that's [Your Phone Number].

# Past Customers Call Scripts Overview- Auto

We have provided you recommended outbound call script ideas with key messaging to be used during the *Call Blitz*. Your final script should be clear, compelling, and aligned with our brand voice. Consider including urgency, exclusivity, and personalization to offer the best chance of booking a new service or appointment.

**Tone:** Thankful, humble, relational

## **Key Conversation Points:**

- Thank you for being a great customer and part of the Glass Doctor family.
- Are you ready for spring? Is your windshield ready?
- Winter is brutal on your car's glass. Studies have shown that 80% of auto glass cracks come from expanding chips we get in the winter. From sudden temperature changes to frost heaving, your car's glass could use a spring check up!
- You may have noticed that your windshield is difficult to see through. Get that clear view back on your windshield with Glass Doctor's Hydrophobic Coating. Nothing repels April showers like a clear view from your windshield.

## **Spring Specials through April:**

- \$50 in shop chip repairs for your windshield to make sure those chips do not turn into cracks
- \$50 hydrophobic coating for existing clients
- \$30 windshield wipers replacement

*And, as always, whenever you choose The Glass Doctor, we will clean your windshield for free and give you a free can of the best glass cleaner anywhere.*



# Past Customers Call Scripts Ideas- Auto

## Call Script:

Hi Polly Carowner, this is Rachel with Glass Doctor. THANK YOU for choosing Glass Doctor to fix your panes in the past. We never take your trust for granted.

I am reaching out to all the clients we have served over these past couple of years, because winter can be brutal on your car's glass. Studies have shown that 80% of auto glass cracks come from expanding chips we get in the winter. From sudden temperature changes to ice scraping, built up salt, and wipers that have lived their best life.

How is your auto glass looking this Spring?

**-----if issue(s) is/are revealed-----take note of the issue(s)**

Great timing! Glass Doctor is making a few special offers based on the very issues you are describing. We are calling this our "Spring Thing."

### **IF chips are present:**

- o \$50 in shop chip repairs for your windshield to make sure those chips do not turn into cracks

### **IF hazy windshield, can't get it clean or glare in the sun is mentioned:**

- o \$50 hydrophobic coating, which repels water and restores the clarity that winter often robs you of

### **IF wipers are streaking or worn out:**

- o \$30 windshield wipers replacement

### **AND always mention:**

- o One free can of glass cleaner to any existing customer who stops by the shop this month and says, "Spring Thing."

How does that sound to you?

Proceed to scheduling a visit in POS.

**-----If No -----**

Fair enough. Let me just say THANK YOU for choosing Glass Doctor to fix your panes in the past. We never take your trust for granted.



# Past Customers Call Scripts Ideas- Auto (cont'd)

## **Voicemail Script:**

Hi Polly Carowner, this is Rachel with Glass Doctor. I'm calling to say thank you again for choosing us for your glass repairs in the past. We really appreciate your business.

Winter can be tough on car glass. Did you know that most windshield cracks start from chips that expand in the cold? Things like temperature changes, ice scraping, and road salt can really take a toll.

How's your auto glass looking this spring? If you're noticing any chips, a hazy windshield, or streaky wipers, we have some special 'Spring Thing' offers for you.

We're offering:

- \$50 in-shop chip repairs to prevent cracks.
- \$50 hydrophobic coating to restore windshield clarity and repel water.
- \$30 windshield wiper replacements.

And, as always, stop by our shop this month and mention 'Spring Thing' for a free can of glass cleaner.

If you'd like to take advantage of these offers or schedule an appointment, please call me back at [Your Phone Number]. Again, that's [Your Phone Number].

Thank you, and have a safe driving day!



# Local Incentive Ideas

Boost the stakes with local office prizes! A touch of friendly competition is a powerful way to keep your team engaged, motivated, and sharply focused on **growing overall customers**.

## Prize Ideas for the Bold

- ★ **Cash Bonus** – A little extra \$ never hurt anyone!
- ★ **Extra PTO** – Let the winner take time off.
- ★ **Gift Cards** – Coffee, lunch, or a gas card.
- ★ **Team Lunch** – Celebrate with a meal!
- ★ **Trophy or Championship Belt** – Give the winner bragging rights with a fun, rotating prize.
- ★ **Company Swag** – Branded gear, tumblers, or even a comfy hoodie.
- ★ **Mystery Grab Bag** – Fill a bag with surprise goodies and let the winner choose blindly!

The stakes are high and the competition is intense—get your team ready to step up, compete boldly, **and win back those customers!**

# Neighborly Prizes

Neighborly is excited to host our second *Call Blitz* campaign across 18 North American Brands! To support your efforts, and encourage a competitive spirit, we are pleased to offer numerous prizes across various revenue tiers to recognize and reward great effort! **Over \$200,000\* in total prizes!**



## First Place Prize

Local Marketing Investment to execute on local tactics in your market!



## Second Place Prize

Ground Game materials to execute on local canvassing or other local community efforts in your market!



## Third Place Prize

Customer appreciation gifts you can give to your most valued customers to earn more raving fans!

Revenue Tier	First Place	Second Place	Third Place
\$0 to \$500K	\$5,000	\$5,000	\$500
\$500K to \$1.5M	\$10,000	\$6,000	\$600
\$1.5M to \$3M	\$15,000	\$7,000	\$700
\$3M to \$6M	\$20,000	\$8,000	\$800
\$6M to \$10M	\$25,000	\$9,000	\$900
\$10M to \$25M	\$30,000	\$10,000	\$1,000
\$25M +	\$35,000	\$11,000	\$1,100

\*If a winner is in Canada, prizes will be awarded in Canadian dollars, calculated based on the equivalent exchange rate in effect on the date of issuance.



**If you need assistance at any point during the Call Blitz, please reach out to your Franchise Business Coach or your Local Performance Marketing Coach.**

**We're here to ensure your success!**