

Successfully Taking a Phone Order

Introduction: Little Joy Flowers is a full-service flower shop. This video will show new employees how to properly take a phone order.

Learning Objectives:

Upon completion of the training, the learner will be able to:

- Identify the importance of following a plan during the phone sales consultation.
- Describe the key points to address during a phone consultation:
 - Start with the simple questions – when, where, and occasion
 - Open-ended questions – style and budget
 - Card message
 - Pertinent details – Names, address, and phone number
 - Repeat order and sign off using the customer’s name

Outline:

1. Introduction
 - a. Customer is paying for and leaving the flower shop. Both the customer and salesperson are melancholy.
 - b. Salesperson identifies to the manager that though she filled the order as taken, and the customer seemed satisfied, she doesn’t think he was excited by his purchase.
2. Steps to a proper phone order in the flower shop
 - a. Manager describes that maybe she didn’t conduct a thorough sales call when the customer ordered his flowers and that the shop has a plan to follow to ensure she remembers all of the steps next time.
 - b. Manager outlines the steps involved in conducting a successful phone order.
 - c. The more complicated parts of the process are demonstrated with an actual call with a customer.
3. Summary
 - a. Following a plan when taking an order will ensure all parties understand what is expected and end with a happy customer.

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Characters:



Alicia is the shop manager.

Sarah is the salesperson.

Jason is the first customer.

Steven is the customer who Alicia demonstrates a sales call with on the phone.

Color Palette:



#6FD5E1

Blue



#F6CE46

Gold



#FF5E93

Pink

1. Welcome Slide			
Visuals/Graphic	Script/Audio	Programming/Animation Notes	Comments
The graphic for the welcome slide is set against a light blue background. It includes a black telephone on the left, a clipboard with a checklist and a pencil on the right, and a bouquet of colorful flowers at the bottom. A yellow banner with the text 'Phone Orders' is positioned in the center. Below the banner, the text reads: 'How to take a flower shop phone order successfully every time!'.	<p>[Alicia] Welcome to Phone Orders. How to take a flower shop phone order successfully every time!</p>	<ul style="list-style-type: none">• Text is timed with audio• Fades to next scene	

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2. Introductory Scene			
Visuals/Graphic	Script/Audio	Programming/Animation Notes	Comments
<ul style="list-style-type: none"> • Scene opens inside the flower shop. Use a template with a checkout counter. • Sarah is behind the cash register and Jason is in front holding his flowers • Both Jason and Sarah have melancholy expressions on their faces and are not really excited to be wrapping up the purchase. 	<p>[Sarah] Thank you for your order. Have a nice day.</p> <p>[Jason] Thank you</p> <p>[Alicia] Good afternoon, Sarah! How has your day been?</p> <p>[Sarah] Okay, I guess. Sometimes I feel like I have a customer who just isn't excited about their purchase. Like maybe they were expecting something more.</p> <p>[Alicia] Oh, was there a problem with the last customer?</p> <p>[Sarah] Not really a problem, but I love it when customers are excited when they see their flowers I have custom</p>	<ul style="list-style-type: none"> • Scene transitions in with an effect • Sarah hands Jason the flowers he purchased • Jason is walking out with his bouquet and is shown walking outside the shop • Scene switches back inside and Alicia walks in 	

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	<p>designed for them. It just felt like something was lacking when he left.</p> <p>[Alicia] Maybe you need some help with communicating with your customer. How comfortable do you feel with taking orders on the phone?</p> <p>[Sarah] I'm good with greeting the customer and getting all of the required logistical information, but when it comes to budget and finding out what they really want, I freeze!</p> <p>[Alicia] I can definitely help you with that! I have some pointers that will have you taking orders with ease and confidence. Let me walk you through it.</p> <p>[Sarah] What a relief! Let's get started!</p>		
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3. Steps to a proper phone order			
Visuals/Graphic	Script/Audio	Programming/Animation Notes	Comments
<ul style="list-style-type: none"> The scene changes to Alicia's office. Both ladies are seated in a casual area. 	<p>[Alicia] So, you always want to answer the phone with a warm greeting, like, "Good afternoon, Little Joy Flowers, this is Alicia. How may I help you?"</p> <p>[Steven] "I need to order flowers".</p> <p>[Alicia] After this initial greeting, start out with some very simple questions that allow your customer easy answers that get them comfortable talking with you. They are: Is this for pickup or delivery?, For today or tomorrow?, and What's the occasion? This should get the customer comfortable speaking with you and give you some important information for the next questions you'll be asking.</p> <p>The next set of questions are more open-ended and require</p>	<ul style="list-style-type: none"> Scene opens with an effect When the phone conversation with Steven is shown, mask Steven and Alicia into a thought bubble with a split between the two, showing them talking on the phone. Give this asset an enter/exit effect as appropriate. 	

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	<p>a little more thought and possibly some suggestions from you. They are, “Do you have anything in mind?” Maybe your customer says,</p> <p>[Steven] “yes! I want bright pink and orange. Lots of bold colors and at least a dozen roses.”</p> <p>[Alicia] That’s great, you can take the order exactly as they have it envisioned. But often times we get,</p> <p>[Steven] “I have no idea, can you make a suggestion?”</p> <p>[Alicia] In this case, refer back to your previous questions. Say something like, “okay, this is for your 25th wedding anniversary. Maybe you’d like to do 25 roses in your spouse’s favorite color.” That often leads into the next question,</p>	<ul style="list-style-type: none">• Steven has an excited expression. • Steven looks confused.	
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	<p>“Do you have a budget in mind?”</p> <p>[Steven] “I’m not really familiar how much arrangements cost. Can you give me an idea for something really big and beautiful?”</p> <p>[Alicia] See, here if we’d given our minimum price on an anniversary arrangement, we may have sold ourselves short when the customer was actually looking for something big! So, we quote a number from our premium designs. We always want to give the option to spend as much as they want.</p> <p>“We can do something really spectacular for your anniversary for \$200.”</p> <p>[Steven] “Yes, spectacular is what I’m looking for!”</p>		
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	<p>[Alicia] We can always go down to the deluxe or standard version if the customer says that's more than they'd like to spend. Now, the hard part is over and you should have clarity on what your customer wants. The last few steps are asking what they want on the message card, and getting the logistical details, such as name of the recipient, address, and phone number. Lastly, make sure to sign off from the call warmly and to call the customer by name.</p> <p>[Sarah] That sounds like a great plan! I think I've always offered the minimum pricing for bouquets and arrangements and haven't really found out what the customer wanted. And you have a script to help me with all of this?</p> <p>[Alicia] Absolutely!</p>		
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	<p>[Sarah] Thank you so much for your help! I look forward to getting to put this into practice on my next call!</p>		
4. Wrap-up			
Visuals/Graphic	Script/Audio	Programming/Animation Notes	Comments
<p>Scene is back at the cash register. Sarah is shown in front of the cash register holding a paper. She is talking to herself to review the key points.</p> <p>When she starts going over the points, scene shows a copy of her paper with the key points on it.</p> <p>Scene ends with Sarah with a big smile on her face, beaming with excitement.</p>	<p>[Sarah] So here is the script with the call outline. The key points Alicia told me about are:</p> <ol style="list-style-type: none"> 1. Start with super simple easy questions <ol style="list-style-type: none"> a. For pickup or delivery? b. For today or tomorrow? c. What's the occasion? 2. Ask more open-ended questions – give options if they are stuck <ol style="list-style-type: none"> a. Did you have anything in mind? (i.e., Neutral or brighter?) b. Did you have a budget in mind? 3. Card message 4. Ask for pertinent details – name, address, phone number, etc 	<ul style="list-style-type: none"> • Scene opens with an effect • Use camera movement to show the paper in Sarah's hand with the list on it. • Use job aid pdf when showing the list. 	

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	<p>5. Repeat their order and sign off the call using their name</p> <p>What a load off! Now I feel confident the next customer who calls will get exactly what they want and I won't be underselling myself!</p>		
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