

Sample Call Center Script: Appointment Setting for Tax Preparation Firm

Nancy

Good afternoon. Colonial Tax Service. This is Nancy speaking.

Don

Hi Nancy, I was calling to schedule an appointment to have my taxes done.

Nancy

Is this for your personal taxes?

Don

Yes, for me and my wife.

Nancy

Okay, great. Let me get your information and I'll have one of our tax specialists call you right back. May I have your first name?

Don

Don.

Nancy

Thanks Don. And spell your last name, please.

Don

It's Herbert, H-E-R-B-E-R-T.

Nancy

And your callback number?

Don

610-265-1714.

Nancy

That's 610-265-1714?

Don

Correct.

Nancy

Is this your first time using Colonial?

Don

No, they've done my returns for the past five years, or so.

Nancy

Okay, great. I'll pass your message along and someone will be calling you to arrange a time when you can meet to discuss this year's return.

Don

Great. Thank you.

Nancy

You're welcome. Have a nice day.

Don

You, too. Goodbye.

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