Call scripts

Keep every call under three minutes. You're helping someone decide, not chasing a sale. Whoever is on shift should be able to use these.

Left checkout without paying

Open: "Hi [first name], it's [name] from [business]. I saw you were looking at [membership / plan] yesterday. Have you got a minute?"

Ask: "Was there anything that made you pause?" Then listen.

If it's price: "That's fair. Can I tell you what's included?" Don't offer a discount unless finance has approved it.

If it's a question: Answer it, then ask: "Would you like me to send the link again?"

If it's timing: "No worries at all. When should I check back?" Write the date down.

Keen trial or quote, still open

Open: "Hi [first name], it's [name] from [business]. I saw you've [been in a few times] and wanted to say thanks. Have you got a minute?"

Ask: "What have you enjoyed most?" Then: "Is there anything you'd want to know before deciding?"

If they're keen: "I can send the link now, and explain how the first week works."

If they're unsure: "What would make it an easy yes?" Write the answer down.

Signed up but hasn't started

Open: "Hi [first name], it's [name] from [business]. You signed up on [day] and I noticed you haven't [started] yet. Is now an OK time?"

Ask: "Did anything get in the way?" Write the reason in their words.

Help: "Would it help if I [walk you through it now / book your first session]?" Agree one next step and a date.

Started, but no first result yet

Open: "Hi [first name], I'm checking in to see how you're going with [product / membership]."

Ask: "Most people [reach first result] in about [X] days. What's the one thing that would make it easier?"

Help: Offer to do it together, now or at a set time.

Failed payment

Open: "Hi [first name], it's [name] from [business]. Your payment didn't go through, and I wanted to help sort it out. Have you got a minute?"

Ask: "Has your card changed recently, or is there anything else going on?" Then listen.

Help: "I can send you a link to update your card right now. It takes about a minute."

If money is tight: "We can [pause your membership] so you don't lose it." Mention a discount only if finance has approved one.

Call scripts

Checking in, renewals, cancellations and welcoming new customers.

Customer gone quiet (at risk)

Open: "Hi [first name], it's [name] from [business]. I noticed we haven't seen you in a little while and wanted to check in."

Ask: "Is there anything we could do better?" Then: "Have you tried [something new]? Come in this week and I'll show you."

Renewal chat (about 14 days before the term ends)

Open: "Hi [first name], your [minimum term / plan] ends on [date], so I wanted to check in."

Ask: "What have you enjoyed most? Is there anything you'd like more of?"

Offer: "If it's a busy stretch, we can pause instead of ending it." If they want to change or cancel, help them do it easily.

When someone wants to cancel

Open: "I saw you'd like to cancel. I'm sorry to see you go. Have you got a minute?"

Ask: "What's the main reason?" Then listen. Don't argue or explain.

Offer: Use the offer for that reason from your save-offers sheet: "Would a pause for [length] suit you better? Or we could move you to [lower option]."

If they still want to cancel: "That's completely fine. Thanks for telling me. You're always welcome back." Cancel it straight away and write the reason in the log.

Welcome chat with a new customer (about 10 minutes)

Welcome: "Welcome to [business], [name]. What are you hoping to get from [your membership / us]?"

Start: "Here are two or three things to try first. A good first week is [your first result]."

Book: "When are you planning to come back? I'll send you a quick note in two weeks to see how it's going."

Terms: "Your [minimum term / plan] runs to [date], and I'll check in with you before then."

Voicemail

"Hi [first name], it's [your name] from [business]. Just checking in about [reason], nothing urgent. I'll send you a quick email too. You can call me back on [number]."

Call log

One line per call. Copy each reason into your follow-up and reasons log at the end of the week.

Business: Week of: Caller:

Date	Customer and phone	Why calling	Answered? Voicemail?	What they said	Next step and date