

Upselling and Cross-Selling Scripts Pack

This template pack offers simple, copy-and-paste scripts your team can use to spot more [upselling or cross-selling](#) opportunities during routine visits.

How to use: copy the script that fits your situation and paste it into a new document. Personalize the names and details, then update the tone or language so it aligns with your business.

Scripts for Service Technicians

Customers often call for one problem, but there are usually a few more they don't see. These scripts help techs open that conversation naturally while being professional and proactive.

In-Person Script (Start of Job):

Hey [Customer's Name], while I'm here, I'll go through a quick checklist of a few things around your home just to make sure everything's working the way it should.

Pro Tip: Use a [Jobber checklist](#) to guide this process. Have techs check off items and add notes right from the app. Think of it like a full car inspection—it builds trust and often uncovers extra work that benefits the customer.

In-Person Script (End of Job):

Hey [Customer's Name], I know you mentioned [specific issue (e.g., hot or cold room in their house)], and I think we have a great solution for that. [Tech Name] on our team actually just worked on a similar home in your neighborhood.

I'll have them give you a call with some options that could help. Does that sound good?

Scripts for Customer Service Reps (CSRs)

Your CSRs can set techs up for success before they even arrive. With a few smart questions during booking or dispatch, they open the door for more potential sales.

Phone Call Script (During Booking):

Hey [Customer's Name], I see we've got you set for [service (e.g., gutter cleaning)]. We were just doing a job last week in your neighborhood for [relevant service (e.g., gutter repairs)]. While our tech is there, do you want an estimate for that too? I can add it to your ticket with no extra charge.

Phone Call Script (During Dispatch):

Hey [Customer's Name], while our tech is out there today, do you also want them to take a look at [related service (e.g., the home's drainage system)]? Some of your neighbors have had issues with theirs, and we were able to fix it.

Pro Tip: Ditch the hard sell pitch and lead with prevention. This makes the conversation feel more like a service and shows customers you're focused on helping them avoid future problems.

Email

Can't reach customers by phone? Sending a quick email during dispatch or after the service can still uncover hidden revenue opportunities.

Email Script (During Dispatch):

Subject line: We'll start your service soon

Hi [Customer Name],

Good news, your tech will be out soon! While they're there, ask about [related service (e.g., exterior pressure washing)]. Many homeowners in your area love this add-on.

Let us know if you're interested.

Best,

[Your Name / Company Name]

Email Script (After Job):

Subject line: Thanks for choosing us!

Hi [Customer Name],

We hope you're happy with your service! Here are a few ways to prevent future problems before they happen.

- [List solutions (e.g., air duct cleaning)]

Book any of these within [deadline (e.g., 7 days)] and save [discount (e.g., 10%)]. Let us know if you're interested.

Cheers,

[Your Name / Company Name]

Pro Tip: Use [Jobber Campaigns](#) to automate your email workflow. Your CSRs won't have to remember to hit "send," and your customers will still feel cared for every step of the way.

Happy Calls

A "happy call" the next day isn't just about checking in on customer satisfaction. It's a chance to keep your company top of mind and catch small issues before they turn into missed opportunities.

Phone Call Script (Next-Day):

Hi [Customer's Name], just checking in to make sure everything went well with your service.

I noticed on the checklist you mentioned [issue (e.g., hot or cold room in their house)]. We have a simple solution that can help you. I can put together a couple of options and send them over for you to take a look.

Pro Tip: Timing is everything. Try to call within 24 hours while the experience is still fresh. A quick, genuine check-in today could turn into tomorrow's estimate—and another happy customer.

Bonus: Turn One-Time Jobs into Recurring Work

The best time to talk about future services is when you're booking the first job. That's when your customer's need and trust in you are highest. Mentioning a maintenance plan or seasonal follow-up now makes it easier to turn a one-time visit into [recurring revenue](#).

Phone Call Script (During Booking):

We've got you booked for [service (e.g., gutter cleaning)] on [date].

While you're scheduling this one, I recommend scheduling the next service now. Most homeowners in your area get this done [number of times (e.g., twice)] a year to prevent issues like [problem (e.g., gutters overflowing)].

I can schedule your next service today and give you [discount (e.g., 10%)] off. That way, you don't have to remember to call us later, as it's all set up for you.