COMPANION TO THE CUSTOMER SERVICE FIELD MANUAL

CUSTOMER SERVICE PROMPT LIBRARY

ALL 99 COPY-READY AI PROMPTS

Every prompt from CS-01 to CS-99, in 11 categories, ready to copy, fill in, and review

CS

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FIND YOUR PROMPT

Nine prompts in each of 11 categories. Each tile jumps to its first page.

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HOW TO USE A CARD

01 **Find.** Pick the category that matches what just happened, then the prompt that matches the decision in front of you.

02 **Copy.** Select the prompt text on the card and copy it. Every prompt is complete on its own.

03 **Fill.** Replace each bracketed field with a fact you can verify. Leave optional fields out if you cannot.

04 **Review.** Read the sender review on the card, check the draft against your records, and send it yourself.

CATEGORY 01 OF 11 | PART 1 OF 3

FIRST RESPONSE

CS-01 to CS-09
On this page: CS-01, CS-02, CS-03

CS-01 New question, answer known

Use when: A customer asked something you can answer right now.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [their question, in their words]; [the answer, as I would say it out loud]
Optional: [a link or attachment to include]
Write a reply that answers the question in the first sentence, then adds only what they need to act on it. No greeting longer than one line. If I left out the answer, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the answer is right before you send.

CS-02 New question, answer not known yet

Use when: You need time to find the answer.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [their question, in their words]; [who is finding out]; [when they will hear back]
Write a reply that says plainly we do not have the answer yet, who is looking, and when they will hear back. Give one date or time, not a range of maybes. Do not guess at the answer. If I left out the time they will hear back, reply only with a Needs input list. Return one reply under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the time they will hear back yourself. It is the one fact this prompt refuses to guess.

CS-03 After-hours message

Use when: A message came in while you were closed.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [their message, in their words]; [my hours]; [when someone will reply]
Optional: [an emergency contact, if I have one]
Write a short reply that confirms we got the message, states the hours, and says when a person will answer. If an emergency contact is given, include it once. If I left out when someone will reply, reply only with a Needs input list. Return one reply under 60 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: when someone will reply. Match that to your records.

CATEGORY 01 OF 11 | PART 2 OF 3

FIRST RESPONSE

CS-01 to CS-09
On this page: CS-04, CS-05, CS-06

CS-04 Voicemail follow-up

Use when: You are replying in writing to a voicemail.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they said on the voicemail]; [what I can answer now]; [what I still need from them]
Optional: [best time to call back]
Write a reply that repeats their request in one line so they know it was heard, answers what can be answered, and asks for the one thing still needed. If I left out what they said on the voicemail, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm what they said on the voicemail is right before you send.

CS-05 Wrong department

Use when: The request belongs with someone else in your business.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [their request, in their words]; [who handles it]; [how that person will reach them]
Write a reply that tells them who handles this and that the request has already been passed along. Do not make them repeat themselves. Do not explain the org chart. If I left out who handles it, reply only with a Needs input list. Return one reply under 60 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check who handles it yourself. It is the one fact this prompt refuses to guess.

CS-06 Not something we do

Use when: They asked for a service you do not offer.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they asked for]; [what I do offer that is closest, or none]
Optional: [a business I trust to refer them to]
Write a reply that says in the first sentence that we do not offer this. If a close service is listed, name it once without pushing. Mention the referral only if one is given. If I left out what they asked for, reply only with a Needs input list. Return one reply under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: what they asked for. Match that to your records.

CATEGORY 01 OF 11 | PART 3 OF 3

FIRST RESPONSE

CS-01 to CS-09
On this page: CS-07, CS-08, CS-09

CS-07 Missing details

Use when: You cannot help until they send more information.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [their request]; [the details I need, listed]; [why each one is needed, in a few words]
Write a reply that asks for the missing details as a short numbered list, with a few words on why each is needed. Ask for everything at once so they answer one time. If I left out the details I need, reply only with a Needs input list.
Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the details you need is right before you send.

CS-08 Second message before a reply

Use when: They wrote again because nobody answered the first time.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [their first message and when it came in]; [their second message]; [the answer or the status]
Write a reply that owns the slow answer in one sentence, with no excuses, then gives the answer or the status. Do not blame volume or staffing. If I left out the answer or the status, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the answer or the status yourself. It is the one fact this prompt refuses to guess.

CS-09 Question already answered on the site

Use when: The answer is published, and they missed it.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [their question]; [the answer]; [where it is published]
Write a reply that gives the answer first, in full, then mentions where it lives for next time. Never tell them only to go read the page. If I left out the answer, reply only with a Needs input list.
Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the answer. Match that to your records.

CATEGORY 02 OF 11 | PART 1 OF 3

ORDER AND DELIVERY STATUS

CS-10 to CS-18
On this page: CS-10, CS-11, CS-12

CS-10 Where is my order

Use when: A customer wants to know where their order is.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [order number]; [current status from my system]; [expected date]
Optional: [tracking link]
Write a reply that gives the status and the expected date in the first two sentences. If no date is known, say so and say when we will know. If I left out the current status, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the current status in your order system today, not from memory.

CS-11 Order is late

Use when: The order missed its promised date.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [order number]; [the date that was promised]; [the new date and how firm it is]; [the reason, only if confirmed]
Optional: [what I am offering, marked approved or pending]
Write a reply that states the order is late, gives the new date, and says how firm that date is. Give the reason only if it is confirmed. Describe an offer only if it is marked approved. If I left out the new date, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the new date yourself. It is the one fact this prompt refuses to guess.

CS-12 Backorder notice

Use when: An item they ordered is out of stock.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the item]; [when stock is expected and where that date came from]; [their choices: wait, swap or cancel]
Write a reply that says the item is backordered, gives the expected date and its source, and lays out the choices as a short list. Ask them to pick one. If I left out the choices, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the choices. Match that to your records.

CATEGORY 02 OF 11 | PART 2 OF 3

ORDER AND DELIVERY STATUS

CS-10 to CS-18
On this page: CS-13, CS-14, CS-15

CS-13 Partial shipment

Use when: Part of the order shipped and part did not.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [order number]; [what shipped]; [what did not and when it will]; [whether they pay shipping twice]
Write a reply that separates what is on the way from what is not, with a date for each. Answer the shipping-cost question before they ask it. If I left out what did not ship and when it will, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm what did not ship and when it will in your order system today, not from memory.

CS-14 Address problem

Use when: The address on the order cannot be delivered to.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [order number]; [the address on file]; [what is wrong with it]; [the deadline to fix it]
Write a reply that shows the address on file, says what is wrong, and asks for the corrected address by the deadline. Say what happens to the order if the deadline passes. If I left out the deadline, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the deadline yourself. It is the one fact this prompt refuses to guess.

CS-15 Marked delivered, not received

Use when: Tracking says delivered and the customer does not have it.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [order number]; [what tracking shows, with date and time]; [the steps I will take and when]
Optional: [what I need them to check]
Write a reply that takes the report seriously, states what tracking shows without implying they are wrong, and lists the steps we will take with a time for each. If I left out the steps I will take, reply only with a Needs input list. Return one reply under 110 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the steps you will take. Match that to your records.

CATEGORY 02 OF 11 | PART 3 OF 3

ORDER AND DELIVERY STATUS

CS-10 to CS-18
On this page: CS-16, CS-17, CS-18

CS-16 Damaged on arrival

Use when: The order arrived damaged.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [order number]; [what was damaged, in their words]; [what I need from them, such as photos]; [what happens next]
Optional: [replacement or refund, marked approved or pending]
Write a reply that says sorry for the damage once, asks for what we need in one list, and says what happens after we get it. Describe a remedy only if it is marked approved. If I left out what happens next, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm what happens next in your order system today, not from memory.

CS-17 Wrong item sent

Use when: They received something they did not order.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [order number]; [what they ordered]; [what they got]; [how the right item gets to them and when]
Optional: [whether they need to send the wrong item back, and how]
Write a reply that confirms the mix-up, says when the right item ships, and answers plainly whether they must return the wrong one. If a return is needed, say who pays. If I left out how the right item gets to them, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check how the right item gets to them yourself. It is the one fact this prompt refuses to guess.

CS-18 Order change request

Use when: They want to change an order already placed.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [order number]; [the change they want]; [whether it is still possible, yes or no]; [what it does to the price or date]
Write a reply that answers yes or no in the first sentence. If yes, confirm the change and any effect on price or date. If no, say why in one line and what they can do instead. If I left out whether it is still possible, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: whether it is still possible. Match that to your records.

CATEGORY 03 OF 11 | PART 1 OF 3

BILLING AND PAYMENT QUESTIONS

CS-19 to CS-27
On this page: CS-19, CS-20, CS-21

CS-19 Explain a charge

Use when: A customer does not recognize a charge.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the charge: date, amount, what it shows as]; [what it was for]; [the invoice or order it belongs to]
Write a reply that matches the charge to what it was for in plain words, with the date and the invoice or order number. Offer a copy of the invoice. Do not sound defensive. If I left out what it was for, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm what it was for against the invoice or the payment record.

CS-20 Charged twice

Use when: A customer says they were billed two times.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the two charges: dates and amounts]; [what my records show]; [what I am doing and by when]
Write a reply that states what our records show. If it is a duplicate, say when the reversal was started and that bank timing is outside our control. If one is a pending hold, explain that in one sentence. If I left out what my records show, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check what your records show yourself. It is the one fact this prompt refuses to guess.

CS-21 Invoice copy request

Use when: They need a copy of an invoice or receipt.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [which invoice or date range]; [where I am sending it]
Write a two-sentence reply that confirms the invoice is attached or on its way and names it by number or date. If I left out which invoice, reply only with a Needs input list. Return one reply under 40 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: which invoice. Match that to your records.

CATEGORY 03 OF 11 | PART 2 OF 3

BILLING AND PAYMENT QUESTIONS

CS-19 to CS-27
On this page: CS-22, CS-23, CS-24

CS-22 Payment failed

Use when: Their payment did not go through.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what the payment was for]; [the amount]; [how to update the payment method]; [the date service or the order is affected]
Write a reply that says the payment did not go through, with no blame, and gives the steps to fix it and the date that matters. Never ask them to send card numbers by email or text. If I left out how to update the payment method, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm how to update the payment method against the invoice or the payment record.

CS-23 Price went up

Use when: A customer is asking why their price changed.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the old price and the new price]; [the date it changed]; [the reason I can state truthfully]; [when and how notice was given]
Write a reply that confirms the change, the date, and the reason as given. State when notice was sent. Do not apologize for the price itself and do not argue. If I left out the reason, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the reason yourself. It is the one fact this prompt refuses to guess.

CS-24 Estimate and final bill differ

Use when: The final bill is higher than the estimate.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the estimate amount]; [the final amount]; [each difference and what caused it]; [who approved the extra work, and when]
Write a reply that lists each difference with its cause as short lines, and names who approved added work and when. If no approval is recorded, say so and flag it for me instead of defending the bill. If I left out each difference and what caused it, reply only with a Needs input list. Return one reply under 130 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: each difference and what caused it. Match that to your records.

CATEGORY 03 OF 11 | PART 3 OF 3

BILLING AND PAYMENT QUESTIONS

CS-19 to CS-27
On this page: CS-25, CS-26, CS-27

CS-25 Payment plan question

Use when: They asked whether they can pay over time.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the balance]; [the plan I am able to offer, or none]; [the terms: amounts, dates, any fee]
Write a reply that says whether a plan is available. If so, lay out the amounts and dates as a list and say how to accept. If not, say so plainly and give the due date. Do not add terms that are not listed. If I left out the plan I am able to offer, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the plan you are able to offer against the invoice or the payment record.

CS-26 Late fee dispute

Use when: A customer wants a late fee removed.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the invoice and its due date]; [the date payment arrived]; [the fee and where my terms state it]; [my decision: waive, reduce or keep]
Write a reply that states the dates, the term the fee comes from, and the decision. If waived, say it is a one-time courtesy only if that is true. Keep the tone even. If I left out my decision, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check your decision yourself. It is the one fact this prompt refuses to guess.

CS-27 Refund status

Use when: They are waiting on a refund you already approved.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the refund amount]; [the date I issued it]; [how it was sent]; [the usual timing from the payment company, if I know it]
Write a reply that confirms the amount, the date issued and the method. If timing is known, give it as the payment company's timing, not ours. Say what to do if it has not arrived by a given date. If I left out the date I issued it, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the date you issued it. Match that to your records.

CATEGORY 04 OF 11 | PART 1 OF 3

REFUNDS AND RETURNS

CS-28 to CS-36
On this page: CS-28, CS-29, CS-30

CS-28 Return request, inside the policy

Use when: A return request meets your policy.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they are returning]; [the steps to return it]; [who pays shipping]; [when the refund is issued]
Write a reply that approves the return in the first sentence and lists the steps in order. State who pays shipping and when the refund is issued. If I left out the steps to return it, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the steps to return it against your written policy and this order.

CS-29 Return request, outside the policy

Use when: A return request does not meet your policy.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they want to return and why]; [the part of the policy it misses]; [what I can offer instead, or nothing]
Write a reply that says no in the first two sentences, names the policy term, and offers the alternative only if one is listed. No lecture. Thank them for asking. If I left out the part of the policy it misses, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the part of the policy it misses yourself. It is the one fact this prompt refuses to guess.

CS-30 Refund approved

Use when: You are issuing a refund.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the amount]; [what it is for]; [the method and the date issued]
Write a reply that confirms the refund amount, what it covers, how it was sent and the date. One sentence on timing from their bank, stated as outside our control. If I left out the amount, reply only with a Needs input list. Return one reply under 60 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the amount. Match that to your records.

CATEGORY 04 OF 11 | PART 2 OF 3

REFUNDS AND RETURNS

CS-28 to CS-36
On this page: CS-31, CS-32, CS-33

CS-31 Refund denied

Use when: You are declining a refund request.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they asked for]; [the reason, tied to a fact or a policy term]; [anything I can do instead]
Write a reply that gives the decision first and the reason second, tied to the fact or policy term given. Offer the alternative if one is listed. Do not question their honesty. If I left out the reason, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the reason against your written policy and this order.

CS-32 Partial refund

Use when: You are refunding part of the amount.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the full amount paid]; [the amount being refunded]; [how I got to that number]
Write a reply that states both amounts and shows how the number was reached in one or two short lines. Say when it was issued. If I left out how I got to that number, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check how you got to that number yourself. It is the one fact this prompt refuses to guess.

CS-33 Exchange

Use when: They want to swap an item for another.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the item coming back]; [the item going out]; [any price difference and how it is handled]; [the steps]
Write a reply that confirms the exchange, states any price difference and how it is settled, and lists the steps in order. If I left out the steps, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the steps. Match that to your records.

CATEGORY 04 OF 11 | PART 3 OF 3

REFUNDS AND RETURNS

CS-28 to CS-36
On this page: CS-34, CS-35, CS-36

CS-34 Store credit instead of a refund

Use when: Your policy gives store credit, not money back.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the amount of credit]; [how to use it]; [whether it expires and when]; [the policy term]
Write a reply that says the return is accepted for store credit, names the amount, and explains how to use it and whether it expires. State the policy term once. If I left out the amount of credit, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the amount of credit against your written policy and this order.

CS-35 Service redo offer

Use when: A service was not done right and you are offering to redo it.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what was not right, in their words]; [what I will redo]; [the dates I can offer]; [whether there is any charge]
Write a reply that agrees to redo the work, names exactly what will be redone, offers the dates, and states the charge or that there is none. Do not explain how the miss happened unless it is listed. If I left out what I will redo, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check what you will redo yourself. It is the one fact this prompt refuses to guess.

CS-36 Deposit question

Use when: A customer is asking for a deposit back.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the deposit amount]; [what my agreement says about it]; [my decision]
Write a reply that quotes or restates the agreement term, gives the decision, and says what happens next. If the agreement term is blank, do not draft. Ask me for it. If I left out what my agreement says, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: what your agreement says. Match that to your records.

CATEGORY 05 OF 11 | PART 1 OF 3

COMPLAINTS

CS-37 to CS-45
On this page: CS-37, CS-38, CS-39

CS-37 Service complaint

Use when: A customer is unhappy with service they received.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the complaint, in their words]; [what I have confirmed happened]; [what I am doing about it]; [when they will hear from me again]
Optional: [a remedy, marked approved or pending]
Write a reply that restates the complaint so they know it was read, says what we have confirmed, and what we are doing with a date. Describe a remedy only if it is marked approved. If I left out what I am doing about it, reply only with a Needs input list. Return one reply under 120 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm what you are doing about it is something you will really do, by when you said.

CS-38 Product complaint

Use when: A customer is unhappy with a product.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the product]; [the problem, in their words]; [what I need to look into it]; [their options]
Write a reply that takes the report at face value, asks for what we need in one list, and lays out their options. Do not suggest they used it wrong. If I left out their options, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check their options yourself. It is the one fact this prompt refuses to guess.

CS-39 Staff complaint

Use when: A customer complained about an employee.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what the customer says happened]; [who is looking into it]; [when the customer will hear back]
Write a reply that thanks them for telling us, says who is looking into it and when they will hear back. Do not name discipline, do not take a side, and do not share anything about the employee. If I left out who is looking into it, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: who is looking into it. Match that to your records.

CATEGORY 05 OF 11 | PART 2 OF 3

COMPLAINTS

CS-37 to CS-45
On this page: CS-40, CS-41, CS-42

CS-40 Wait time complaint

Use when: A customer is upset about how long something took.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [how long they waited and for what]; [the cause, only if confirmed]; [what I have changed, only if true]
Write a reply that agrees the wait was too long, gives the cause only if confirmed, and names a change only if one was really made. No promises about next time unless listed. If I left out how long they waited, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm how long they waited is something you will really do, by when you said.

CS-41 Repeat problem

Use when: The same problem has happened to this customer before.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the problem this time]; [the earlier times, with dates]; [what will be different now]; [who owns it]
Write a reply that shows we know this is not the first time by naming the earlier dates, says what is different now, and names one person who owns it. If I left out what will be different now, reply only with a Needs input list. Return one reply under 110 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check what will be different now yourself. It is the one fact this prompt refuses to guess.

CS-42 Complaint with no fix available

Use when: You cannot give the customer what they want.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they want]; [why it is not possible]; [what I can do, even if small]
Write a reply that says honestly we cannot do what they asked and why, in two sentences, then offers what we can do. Do not dress up a no as a maybe. If I left out why it is not possible, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: why it is not possible. Match that to your records.

CATEGORY 05 OF 11 | PART 3 OF 3

COMPLAINTS

CS-37 to CS-45
On this page: CS-43, CS-44, CS-45

CS-43 Complaint that is partly right

Use when: Part of the complaint is fair and part is not.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the part I agree with]; [the part I do not, with the facts]; [what I am doing about the fair part]
Write a reply that leads with the part we agree with and what we are doing about it. State the other part as facts, once, without arguing. If I left out the part I agree with, reply only with a Needs input list. Return one reply under 110 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the part you agree with is something you will really do, by when you said.

CS-44 Complaint sent to the wrong business

Use when: The complaint is about a company that is not yours.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they described]; [how I know it was not my business]
Optional: [the right company, if I know it]
Write a short, kind reply that says this does not appear to be us and why. Point them to the right company only if it is listed. If I left out how I know it was not my business, reply only with a Needs input list. Return one reply under 60 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check how you know it was not your business yourself. It is the one fact this prompt refuses to guess.

CS-45 Thanks after a complaint is fixed

Use when: The complaint is resolved and you want to close it well.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what the problem was]; [what was done]; [the date it was resolved]
Write a short note that confirms what was done and thanks them for the chance to fix it. Do not ask for a review in this message. If I left out what was done, reply only with a Needs input list. Return one reply under 60 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: what was done. Match that to your records.

CATEGORY 06 OF 11 | PART 1 OF 3

SCHEDULING AND APPOINTMENTS

CS-46 to CS-54
On this page: CS-46, CS-47, CS-48

CS-46 Confirm an appointment

Use when: You are confirming a booked time.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [date and time]; [location or how to connect]; [what to bring or prepare]; [how to change it]
Write a confirmation with the date, time and place on their own lines, then what to bring and how to change it. If I left out date and time, reply only with a Needs input list. Return one message under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm date and time on your calendar before this goes out.

CS-47 Reschedule, your side

Use when: You need to move their appointment.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the original date and time]; [the reason, only if I want it shared]; [the new times I can offer]
Write a reply that says we need to move the appointment, says sorry once, and offers the new times as a list. Ask them to pick one or suggest another. If I left out the new times I can offer, reply only with a Needs input list. Return one message under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the new times you can offer yourself. It is the one fact this prompt refuses to guess.

CS-48 Reschedule, their side

Use when: The customer asked to move their appointment.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the original date and time]; [the new times I can offer]; [any fee or policy that applies]
Write a reply that offers the new times as a list. If a fee or policy applies, state it once and plainly before they choose. If I left out the new times I can offer, reply only with a Needs input list. Return one message under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the new times you can offer. Match that to your records.

CATEGORY 06 OF 11 | PART 2 OF 3

SCHEDULING AND APPOINTMENTS

CS-46 to CS-54
On this page: CS-49, CS-50, CS-51

CS-49 Missed appointment

Use when: The customer did not show up.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the date and time missed]; [my no-show policy, if any]; [how to rebook]
Write a reply that notes the missed time without scolding, states the policy only if one is listed, and tells them how to rebook. If I left out how to rebook, reply only with a Needs input list. Return one message under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm how to rebook on your calendar before this goes out.

CS-50 Running late

Use when: Your team will be late to a visit.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the scheduled time]; [the new arrival time]; [the reason, only if confirmed]
Optional: [their choice to keep or move the visit]
Write a short text-length message with the new arrival time first. Offer the choice to move the visit if that is listed. If I left out the new arrival time, reply only with a Needs input list. Return one message under 45 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the new arrival time yourself. It is the one fact this prompt refuses to guess.

CS-51 Waitlist

Use when: The slot they want is full and you keep a waitlist.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they wanted]; [how the waitlist works]; [the next open time I do have]
Write a reply that says the time is full, offers the next open time, and explains the waitlist in two sentences. If I left out the next open time, reply only with a Needs input list. Return one message under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the next open time. Match that to your records.

CATEGORY 06 OF 11 | PART 3 OF 3

SCHEDULING AND APPOINTMENTS

CS-46 to CS-54
On this page: CS-52, CS-53, CS-54

CS-52 Reminder

Use when: You are reminding a customer of an upcoming visit.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [date and time]; [location]; [one thing they must do before, or none]
Write a reminder under 40 words with the date and time first. Include the one thing to do before, if listed. If I left out date and time, reply only with a Needs input list. Return one message under 40 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm date and time on your calendar before this goes out.

CS-53 Cancellation, your side

Use when: You have to cancel on a customer.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what is being canceled]; [the reason, only if confirmed]; [what I am offering in its place]
Write a reply that states the cancellation in the first sentence, says sorry once, and offers what is listed in its place. If I left out what is being canceled, reply only with a Needs input list. Return one message under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check what is being canceled yourself. It is the one fact this prompt refuses to guess.

CS-54 Cancellation, their side

Use when: The customer canceled.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they canceled]; [any fee or refund under my policy]; [how to book again]
Write a reply that confirms the cancellation, states the fee or refund exactly as the policy gives it, and says how to book again. If I left out what they canceled, reply only with a Needs input list. Return one message under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: what they canceled. Match that to your records.

CATEGORY 07 OF 11 | PART 1 OF 3

HOW-TO AND TROUBLESHOOTING

CS-55 to CS-63
On this page: CS-55, CS-56, CS-57

CS-55 Step-by-step answer

Use when: A customer asked how to do something.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they are trying to do]; [the steps, in order]; [what they should see when it worked]
Write a reply with the steps as a numbered list, one action per step, and a last line that says what success looks like. If I left out the steps, reply only with a Needs input list. Return one reply under 120 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the steps by walking through it yourself once.

CS-56 First troubleshooting pass

Use when: Something is not working and you do not yet know why.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what is happening, in their words]; [the first things to try, in order]; [what to send me if none of it works]
Write a reply that gives the things to try as a numbered list, simplest first, and says exactly what to send us if the problem remains. If I left out the first things to try, reply only with a Needs input list. Return one reply under 120 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the first things to try yourself. It is the one fact this prompt refuses to guess.

CS-57 Known issue

Use when: The problem is one you already know about.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the issue]; [what causes it, if confirmed]; [the workaround]; [when a fix is expected, or unknown]
Write a reply that confirms we know about this, gives the workaround as steps, and states the fix date or says honestly that there is none yet. If I left out the workaround, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the workaround. Match that to your records.

CATEGORY 07 OF 11 | PART 2 OF 3

HOW-TO AND TROUBLESHOOTING

CS-55 to CS-63
On this page: CS-58, CS-59, CS-60

CS-58 Fix confirmed

Use when: You fixed the problem and are telling the customer.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what was wrong]; [what was done]; [what they should check on their side]
Write a reply that says what was fixed in plain words and asks them to check one thing to confirm. If I left out what was done, reply only with a Needs input list. Return one reply under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm what was done by walking through it yourself once.

CS-59 Need a photo or screenshot

Use when: You cannot diagnose without seeing it.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they reported]; [what I need a picture of]; [how to send it]
Write a short reply that asks for the picture, says exactly what should be in it, and how to send it. If I left out what I need a picture of, reply only with a Needs input list. Return one reply under 60 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check what you need a picture of yourself. It is the one fact this prompt refuses to guess.

CS-60 User error, said kindly

Use when: The product is fine and a step was missed.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they reported]; [the step that was missed]; [how to do it]
Write a reply that gives the missing step as the fix, with no blame and no phrase like as stated in the manual. Thank them for checking with us. If I left out the step that was missed, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the step that was missed. Match that to your records.

CATEGORY 07 OF 11 | PART 3 OF 3

HOW-TO AND TROUBLESHOOTING

CS-55 to CS-63
On this page: CS-61, CS-62, CS-63

CS-61 Out of warranty

Use when: The item is past its warranty.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the item and purchase date]; [the warranty term]; [the paid options, with prices]
Write a reply that states the purchase date and the warranty term, says it has ended, and lists the paid options with prices. If I left out the warranty term, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the warranty term by walking through it yourself once.

CS-62 Warranty claim accepted

Use when: You are honoring a warranty claim.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the item]; [what the warranty covers here]; [the steps and the timing]
Write a reply that confirms the claim is accepted, what is covered, and the steps with timing. If I left out what the warranty covers here, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check what the warranty covers here yourself. It is the one fact this prompt refuses to guess.

CS-63 Safety concern

Use when: A customer reports something that could be unsafe.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they reported]; [the instruction to give right now, from my own safety guidance]; [who will contact them and when]
Write a reply that puts the instruction first, in one plain sentence, then says who will contact them and when. Do not diagnose and do not minimize. If the instruction is blank, do not draft. Tell me to call the customer. If I left out the instruction to give right now, reply only with a Needs input list. Return one reply under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the instruction to give right now. Match that to your records.

CATEGORY 08 OF 11 | PART 1 OF 3

POLICY AND SAYING NO

CS-64 to CS-72
On this page: CS-64, CS-65, CS-66

CS-64 Explain a policy

Use when: A customer asked what your policy is.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the policy, as written]; [how it applies to their case]
Write a reply that states the policy in plain words and then says what it means for them specifically. If I left out the policy, as written, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the policy, as written matches what is published where customers can see it.

CS-65 Exception request, approved

Use when: You are making an exception to a policy.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they asked for]; [what I am approving]; [whether this is one time only]
Write a reply that approves the request and states exactly what is approved. Say it is a one-time exception only if that is listed. If I left out what I am approving, reply only with a Needs input list. Return one reply under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check what you are approving yourself. It is the one fact this prompt refuses to guess.

CS-66 Exception request, denied

Use when: You are not making an exception.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they asked for]; [the policy term]; [why the policy exists, in one honest line]
Write a reply that says no clearly, states the term, and gives the one-line reason. Do not hint that asking again will help. If I left out the policy term, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the policy term. Match that to your records.

CATEGORY 08 OF 11 | PART 2 OF 3

POLICY AND SAYING NO

CS-64 to CS-72
On this page: CS-67, CS-68, CS-69

CS-67 Discount request

Use when: A customer asked for a lower price.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they asked for]; [my answer]; [any real offer that is open to everyone]
Write a reply that answers yes or no in the first sentence. Mention an offer only if it is listed and currently open. Do not invent urgency. If I left out my answer, reply only with a Needs input list. Return one reply under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm your answer matches what is published where customers can see it.

CS-68 Rush request

Use when: They need it faster than your normal timing.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they need and by when]; [whether I can do it]; [the rush cost, if any]
Write a reply that answers whether the date is possible. If yes, state the cost and what we need from them today. If no, give the earliest real date. If I left out whether I can do it, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check whether you can do it yourself. It is the one fact this prompt refuses to guess.

CS-69 Request outside your service area

Use when: They are outside where you work.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [where they are]; [my service area]
Optional: [someone I trust who works there]
Write a short reply that says we do not serve that area. Give the referral only if one is listed. If I left out my service area, reply only with a Needs input list. Return one reply under 50 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: your service area. Match that to your records.

CATEGORY 08 OF 11 | PART 3 OF 3

POLICY AND SAYING NO

CS-64 to CS-72
On this page: CS-70, CS-71, CS-72

CS-70 Privacy request

Use when: A customer asked what information you hold or asked you to remove it.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they asked for]; [what my privacy notice says I will do]; [who handles these requests and how long it takes]
Write a reply that confirms the request was received, says who handles it and the timing, and restates what the privacy notice commits to. Do not state legal rights or conclusions. Flag this for my review before sending. If I left out what my privacy notice says, reply only with a Needs input list. Return one reply under 90 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm what your privacy notice says matches what is published where customers can see it.

CS-71 Request for another customer's information

Use when: Someone asked for details about another customer.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they asked for]; [my rule on sharing customer information]
Write a short reply that says we do not share information about other customers, and offers to pass a message along only if that is listed in the rule. If I left out my rule on sharing, reply only with a Needs input list. Return one reply under 50 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check your rule on sharing yourself. It is the one fact this prompt refuses to guess.

CS-72 Ending a customer relationship

Use when: You have decided to stop serving a customer.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the decision and the effective date]; [what is still owed either way]; [how open work or orders will be finished or refunded]
Write a calm, short letter that states the decision and the date, what happens to open work, and what is owed either way. Give no list of grievances. Flag this for my review before sending. If I left out the effective date, reply only with a Needs input list. Return one reply under 110 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the effective date. Match that to your records.

CATEGORY 09 OF 11 | PART 1 OF 3

REVIEWS AND PUBLIC REPLIES

CS-73 to CS-81
On this page: CS-73, CS-74, CS-75

CS-73 Reply to a positive review

Use when: A customer left a good public review.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they said]; [one specific detail to thank them for]
Write a public reply that thanks them and mentions the specific detail. No sales pitch, no keywords stuffed in, no exclamation points in a row. If I left out one specific detail, reply only with a Needs input list. Return one reply under 45 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm one specific detail is accurate and safe to say in public.

CS-74 Reply to a negative review, fair

Use when: A critical review is fair.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they said]; [what I have confirmed]; [what I did or will do]; [how they can reach me directly]
Write a public reply that owns what is confirmed, says what was done, and gives a direct contact. Share no private details about the customer or their order. If I left out what I have confirmed, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check what you have confirmed yourself. It is the one fact this prompt refuses to guess.

CS-75 Reply to a negative review, facts in dispute

Use when: A review says something you believe is wrong.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they said]; [the facts I can state publicly without private details]; [how they can reach me directly]
Write a public reply that stays calm, states only the public facts, and invites direct contact. Do not call the reviewer a liar and do not reveal anything about their account. If I left out how they can reach me directly, reply only with a Needs input list. Return one reply under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: how they can reach you directly. Match that to your records.

CATEGORY 09 OF 11 | PART 2 OF 3

REVIEWS AND PUBLIC REPLIES

CS-73 to CS-81
On this page: CS-76, CS-77, CS-78

CS-76 Review from someone you cannot find

Use when: You have no record of the reviewer.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what the review says]; [what I checked]
Optional: [how they can reach me]
Write a public reply that says we could not match this to a visit or order and would like to look into it, with a contact method. Do not accuse them of being fake. If I left out what I checked, reply only with a Needs input list. Return one reply under 55 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm what you checked is accurate and safe to say in public.

CS-77 Reply to a mixed review

Use when: A review has praise and a complaint.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the praise]; [the complaint]; [what I am doing about the complaint]
Write a public reply that thanks them for the praise and answers the complaint directly with what we are doing. If I left out what I am doing about the complaint, reply only with a Needs input list. Return one reply under 65 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check what you are doing about the complaint yourself. It is the one fact this prompt refuses to guess.

CS-78 Ask a happy customer for a review

Use when: A customer just told you they are pleased.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they were pleased with]; [where I would like the review]; [the link]
Write a short request that thanks them, asks once, and gives the link. Offer nothing in exchange for the review. If I left out the link, reply only with a Needs input list. Return one message under 50 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the link. Match that to your records.

CATEGORY 09 OF 11 | PART 3 OF 3

REVIEWS AND PUBLIC REPLIES

CS-73 to CS-81
On this page: CS-79, CS-80, CS-81

CS-79 Reply to a public comment or question

Use when: Someone asked a question on a public post.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [their question]; [the answer]; [whether details should move to a private message]
Write a public reply that answers in one or two sentences and moves to a private message only if account details are needed. If I left out the answer, reply only with a Needs input list. Return one reply under 45 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the answer is accurate and safe to say in public.

CS-80 Reply to a public complaint on social media

Use when: Someone complained in public.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they posted]; [what I can say publicly]; [how to reach me privately]
Write a public reply that acknowledges the post, says we want to fix it, and gives the private contact. Do not argue in public. If I left out how to reach me privately, reply only with a Needs input list. Return one reply under 45 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check how to reach you privately yourself. It is the one fact this prompt refuses to guess.

CS-81 Thank a customer for a referral

Use when: A customer sent someone to you.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [who referred whom, first names only]; [what I want to say thanks for]
Optional: [a thank-you I am giving, if any]
Write a short thank-you that names the referral. Mention the gift only if one is listed. If I left out who referred whom, reply only with a Needs input list. Return one message under 45 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: who referred whom. Match that to your records.

CATEGORY 10 OF 11 | PART 1 OF 3

FOLLOW-UP AND CHECK-INS

CS-82 to CS-90
On this page: CS-82, CS-83, CS-84

CS-82 After a completed job

Use when: The work is done and you are checking in.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what was done and when]; [one thing they should know or do next]
Write a short check-in that names the work, gives the one next thing, and makes it easy to reply if something is off. If I left out what was done and when, reply only with a Needs input list. Return one message under 60 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm what was done and when from the job record before you check in.

CS-83 After a purchase

Use when: They bought something and you want to help them use it.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they bought]; [the one tip most people need]; [where to get help]
Write a short note with the one tip and where to get help. No upsell. If I left out the one tip, reply only with a Needs input list. Return one message under 55 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the one tip yourself. It is the one fact this prompt refuses to guess.

CS-84 After a support case closes

Use when: A support case was closed and you are confirming it stayed fixed.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what the issue was]; [the date it was closed]
Write a two-sentence check-in asking whether the fix has held, with a simple way to reply. If I left out what the issue was, reply only with a Needs input list. Return one message under 40 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: what the issue was. Match that to your records.

CATEGORY 10 OF 11 | PART 2 OF 3

FOLLOW-UP AND CHECK-INS

CS-82 to CS-90
On this page: CS-85, CS-86, CS-87

CS-85 Maintenance reminder

Use when: Something they own is due for service.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what is due]; [why it matters, in one line]; [how to book]
Optional: [the price, if fixed]
Write a reminder that says what is due and why in one line each, and how to book. Include the price only if listed. If I left out what is due, reply only with a Needs input list. Return one message under 60 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm what is due from the job record before you check in.

CS-86 Renewal reminder

Use when: A plan or membership is about to renew.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what renews]; [the date]; [the amount]; [how to change or cancel before then]
Write a notice with the date and amount in the first sentence and how to change or cancel in the second. If I left out the date, reply only with a Needs input list. Return one message under 60 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the date yourself. It is the one fact this prompt refuses to guess.

CS-87 Unfinished request

Use when: A customer started something and stopped.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they started]; [what is left to do]; [how long I will hold it]
Write a short nudge that says what is left and how long we will hold it. One message, no guilt. If I left out what is left to do, reply only with a Needs input list. Return one message under 50 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: what is left to do. Match that to your records.

CATEGORY 10 OF 11 | PART 3 OF 3

FOLLOW-UP AND CHECK-INS

CS-82 to CS-90
On this page: CS-88, CS-89, CS-90

CS-88 Quiet customer

Use when: A regular customer has not been in for a while.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [how long it has been]; [something true and new since their last visit, or nothing]
Write a short, warm note. Mention what is new only if something is listed. Do not guess at why they left. If I left out how long it has been, reply only with a Needs input list. Return one message under 55 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm how long it has been from the job record before you check in.

CS-89 Feedback request

Use when: You want to know how you did.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they bought or used]; [the one question I most want answered]; [how to answer]
Write a request built around the one question, with one way to answer. Say how long it takes only if it is truly under a minute. If I left out the one question, reply only with a Needs input list. Return one message under 50 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check the one question yourself. It is the one fact this prompt refuses to guess.

CS-90 Holiday or closure notice

Use when: Your hours are changing.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the dates and hours]; [what is affected]; [how to reach me for urgent needs, if at all]
Write a notice with the dates and hours on their own lines, then what is affected and the urgent contact if one is listed. If I left out the dates and hours, reply only with a Needs input list. Return one message under 60 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: the dates and hours. Match that to your records.

CATEGORY 11 OF 11 | PART 1 OF 3

ESCALATIONS AND HARD CONVERSATIONS

CS-91 to CS-99
On this page: CS-91, CS-92, CS-93

CS-91 Hand off to a manager

Use when: You are passing a customer to someone senior.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the issue, in two lines]; [who is taking over]; [when that person will make contact]
Write a reply that introduces the person taking over, confirms they have the full history, and says when they will reach out. If I left out who is taking over, reply only with a Needs input list. Return one reply under 70 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm who is taking over with whoever owns the decision before you send.

CS-92 Internal handoff note

Use when: You are briefing a coworker who is taking the case.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the customer and the issue]; [what has been tried]; [what was promised and by whom]; [what the customer wants]
Write an internal note with four short headed parts: issue, tried, promised, wants. Facts only, no opinions about the customer. This note is not sent to the customer. If I left out what was promised and by whom, reply only with a Needs input list. Return one note under 130 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check what was promised and by whom yourself. It is the one fact this prompt refuses to guess.

CS-93 Mistake you made

Use when: Your business made an error that affected the customer.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what went wrong]; [how it affected them]; [what I have done to fix it]; [what I am doing so it does not repeat, only if true]
Write a reply that states the mistake plainly, says sorry once, describes the fix, and names the prevention step only if one is real. No passive voice hiding who did it. If I left out what I have done to fix it, reply only with a Needs input list. Return one reply under 110 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: what you have done to fix it. Match that to your records.

CATEGORY 11 OF 11 | PART 2 OF 3

ESCALATIONS AND HARD CONVERSATIONS

CS-91 to CS-99
On this page: CS-94, CS-95, CS-96

CS-94 Bad news

Use when: You have to tell a customer something they will not like.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [the news]; [why]; [their options]
Write a reply that gives the news in the first sentence, the reason in the second, and the options as a list. Do not bury it under pleasantries. If I left out the news, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Confirm the news with whoever owns the decision before you send.

CS-95 Angry customer, first reply

Use when: A customer wrote in anger.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what they are angry about, in their words]; [what I know so far]; [what I will do next and when]
Write a reply that responds to the substance and not the tone, says what we know and what we will do with a time. Short sentences. Do not tell them to calm down. If I left out what I will do next, reply only with a Needs input list. Return one reply under 100 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Check what you will do next yourself. It is the one fact this prompt refuses to guess.

CS-96 Abusive language

Use when: A customer was abusive toward your staff.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Customer: [name, and how they reached us]
Scenario: [what happened, stated neutrally]; [my rule on conduct]; [what I will still do to help]
Write a firm, polite reply that says we will keep helping, states the conduct rule once, and says how the rest of the conversation will work. No threats. If I left out my rule on conduct, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW
Last look before you send: your rule on conduct. Match that to your records.

CATEGORY 11 OF 11 | PART 3 OF 3

ESCALATIONS AND HARD CONVERSATIONS

CS-91 to CS-99
On this page: CS-97, CS-98, CS-99

CS-97 Threat of a chargeback or legal action

Use when: A customer threatened a chargeback, a lawsuit or a regulator.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]

Customer: [name, and how they reached us]

Scenario: [what they said]; [the facts of the transaction]; [what I have offered so far]

Write a short, neutral reply that acknowledges the message, restates the facts and the open offer, and gives one contact for further discussion. Admit nothing and argue nothing. This is not legal advice. Flag for my review, and suggest I speak with an attorney before sending. If I left out the facts of the transaction, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW

Confirm the facts of the transaction with whoever owns the decision before you send.

CS-98 Injury or property damage report

Use when: A customer says your product or service caused harm.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]

Customer: [name, and how they reached us]

Scenario: [what they reported]; [who at my business will contact them and when]

Write a brief reply that expresses concern, confirms the report was received, and says who will contact them and when. Say nothing about fault, cause or coverage. Flag for my review before sending, and remind me to notify my insurer. If I left out who will contact them and when, reply only with a Needs input list. Return one reply under 60 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW

Check who will contact them and when yourself. It is the one fact this prompt refuses to guess.

CS-99 Final answer

Use when: You have answered several times and the decision will not change.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]

Customer: [name, and how they reached us]

Scenario: [the request]; [the decision]; [what was already offered]; [where else they can take the concern, if anywhere]

Write a closing reply that restates the decision and what was offered, says this is our final answer on this point, and stays courteous. If I left out the decision, reply only with a Needs input list. Return one reply under 80 words. Use only the facts above. Do not promise anything that is not stated above. Put anything I must check or do under Sender notes, outside the reply.

SENDER REVIEW

Last look before you send: the decision. Match that to your records.

REVIEW

BEFORE YOU SEND

The prompts draft. You verify and send.

BEFORE YOU SEND ANY REPLY

- [ ] The reply answers the question they asked, in the first lines.
- [ ] Names, order numbers, amounts and dates match your records.
- [ ] Every promise is one you control and will keep.
- [ ] Any link or attachment is present and correct.
- [ ] Nothing private appears in a public reply.
- [ ] There is one clear next step, or none if none is needed.
- [ ] A no comes with what they can do instead.
- [ ] It reads naturally out loud, in your voice.

WHAT EVERY PROMPT WILL NOT DO

It will not invent results, proof, names, prices, dates, policies or promises. It cannot check your records, send anything for you, or know what changed since you last looked. Those stay with you.

WHEN IT RETURNS NEEDS INPUT

A fact the prompt will not guess is missing. Supply it and run the prompt again. Do not ask the AI to guess. A Needs input reply is the prompt working as designed.

THE REST OF THE SET

Recon11_Customer_Service_Field_Manual_99.pdf explains the briefs, a worked example, and how to measure.
Recon11_99_Customer_Service_Prompts.xlsx adds filtering and a results log.
Recon11_99_Customer_Service_Prompts.md is the plain-text copy.