



Frictionless.
Friendly. Future-Proof.



Secure Transactions



Happy Payments



Innovation

Agent Program Toolkit “Hi My Name is.” Scripts.

Welcome to the MSD Tool Kit

Introduction for Managers with New Hires:

Setting Appointments.

Welcome to the Merchant Service Depot (MSD) Tool Kit! This guide is designed to help managers onboard new hires and equip them with the essential skills and knowledge needed to excel in the payment processing industry. Our goal is to ensure that new agents are confident, well-prepared, and ready to deliver exceptional service to our clients.

Key Objectives:

- Provide a comprehensive overview of MSD's services and value propositions.
- Train new hires on effective communication and sales techniques.
- Equip agents with scripts and tools to engage with potential clients efficiently.

Agent Open Call Script - Merchant Service Depot

Introduction (Gatekeeper/Initial Contact):

1. Agent: Hi, may I speak with [John] please?
2. Gatekeeper: [Response]
3. Agent: Oh, I thought [John] was the owner of [Business Name].
4. Gatekeeper: [Response]
5. Agent: Ok, then who's the owner over there?
6. Gatekeeper: [Response]
7. Agent: Great, can I speak with [Owner Name]? It's regarding the finances of [Business Name] and it's really important.



Main Script:

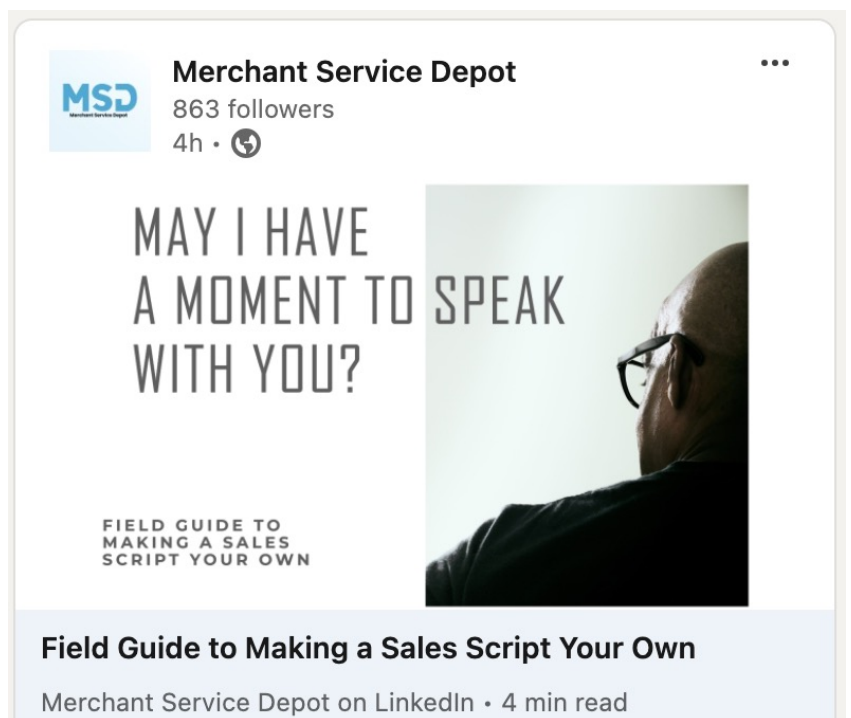
1. Agent: Hi, is this [Owner Name]? Great, how are you doing today?
2. Owner: [Response]
3. Agent: This call is regarding the finances of [Business Name]. I know you're super busy, so I'll just take a minute and get off the phone with you.
4. Agent: My name is [Your Name] and I'm calling from Merchant Service Depot. We were doing some research in [Location Name] and it looks like we can save [Business Name] a significant amount on your processing costs.
5. Agent: We can save you 70-90% on your processing costs, which translates to \$70-90 savings on every \$100 billed.
6. Agent: We have a representative in your area named [Rep Name]. They have tons of experience and have been in the industry for a long time.
7. Agent: [Rep Name] can stop by tomorrow to give you all the information. Would 10:15 or 11:30 work better for you?
8. Owner: [Response]
9. Agent: Fantastic. [Rep Name] will be out to see you tomorrow at [Time]. Can you make sure to have your merchant statement ready for them? Thanks, that'll speed everything up a lot!
10. Agent: Now, if you want to save the most money, write down this code: D420. Do you have it? Ok, this code qualifies you for the large savings on your processing.
11. Agent: Lastly, just a couple of questions to get everything going. What processor are you with now? [Record Answer]
12. Agent: How much credit card volume do you do every month? [Record Answer]
13. Agent: Ok, thanks, it was great talking to you. I'm going to transfer the call to our dispatch department to confirm the time. Give me one second.



Dispatch Department:

1. Dispatcher: Hi, is this [Owner Name]?
2. Owner: [Response]
3. Dispatcher: Just to confirm, you are the owner of [Business Name], correct?
4. Owner: [Response]
5. Dispatcher: Alright, now we have you down for [Day] at [Time] with [Rep Name]. They'll be out to see you to show you everything about our program.
6. Dispatcher: Just to confirm, you will have your merchant statement available, is that right? Great, that will speed everything up a lot.
7. Dispatcher: Lastly, your address, I have it here as [Address of Business]. Perfect.
8. Dispatcher: We'll see you tomorrow at [Day/Time]. Thanks so much, and have a great day. Goodbye.

Check out our linkedin
for a 4 mon read on
making this your own



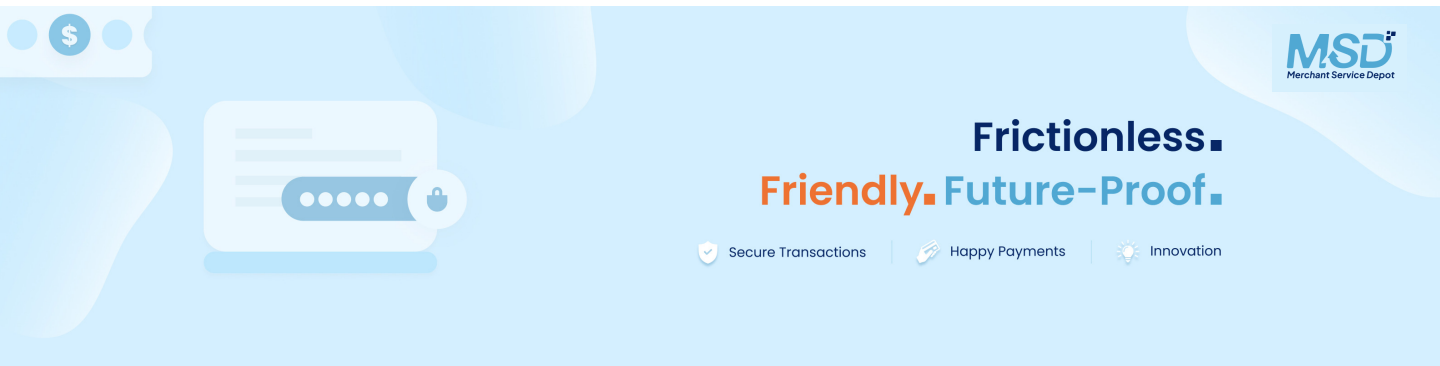
Personalized Instructions for MSD Rep and Customer

For MSD Rep:

1. Prepare: Make sure you know the details of the savings we offer and the benefits for the customer.
2. Engage: Be polite and professional, ensuring you address the customer's needs quickly and efficiently.
3. Confirm: Verify the appointment time and ensure the customer has the necessary documents ready.
4. Follow-Up: Transfer the call to the dispatch department smoothly for final confirmation.

For Customer:

1. Understand: The call is regarding potential savings on your processing costs.
2. Prepare: Have your merchant statement ready for the appointment.
3. Verify: Note down the savings code (D420) provided by the agent.
4. Appointment: Confirm the date and time of the representative's visit.
5. Save: Be ready to discuss your current processor and credit card volume for the best savings evaluation.



THANK YOU.