EMPLOYEE TRAINING MANUAL

Topic: General House-call Training

ALL EMPLOYEES ARE REQUIRED TO KNOW THIS INFORMATION

👋 Employee Training Manual: How to Greet the Customer

Objective

To greet every customer with warmth, professionalism, and respect—setting a positive tone for the visit, creating trust, and showing that we care about their space and experience.

📌 Core Principles

- A friendly, respectful greeting builds instant rapport.
- We represent our company’s values with our attitude and appearance.
- Be on time, well-groomed, and wearing your uniform—first impressions matter.
- Always greet with a smile, positive energy, and polite language.

🧼 Step-by-Step: How to Greet the Customer

Knock or Ring Once

Announce your arrival by ringing the bell or knocking gently. Do not peek through windows or open the door.

Smile and Make Eye Contact

When the customer answers, stand with a relaxed posture and smile warmly.

Say Your Name and Company

Introduce yourself clearly: 'Hi! I’m [Your Name] with Katie’s Cleaning Crew. I’m here for your cleaning appointment.'

Confirm the Service

Briefly confirm what you’re there to do: 'We’ll be working on your kitchen and bathrooms today, correct?'

Ask Where to Start or for Notes

Ask: 'Would you like us to start anywhere specific?' or 'Are there any notes you’d like us to know today?'

Be Mindful of Personal Space

Stay a respectful distance back from the door and don’t enter until you’re invited in.

🤝 If the Customer is Not Home

If you're entering while the customer is away, follow any key or code instructions precisely. Send a quick courtesy text:
'Hi [Customer Name], this is [Your Name] from Katie’s Cleaning Crew. We’ve just arrived and are starting the cleaning now. Let us know if there’s anything special to keep in mind!'

✨ Pro Tip to Elevate the Experience

Use the customer’s name once during the greeting if you know it. People love hearing their name—it builds a personal connection immediately.

✅ Greeting Checklist

- Smiled and made eye contact
- Introduced yourself and the company clearly
- Confirmed services politely and professionally
- Asked about preferences or special requests
- Stayed respectful and calm, even if the customer seemed rushed

🚪 Employee Training Manual: Initial Walkthrough with the Customer

Objective

To begin every job with a short, professional walkthrough of the home alongside the customer—clarifying expectations, identifying special instructions, and building a strong foundation of communication and trust.

📌 Core Principles

- Always begin with a calm, friendly attitude.
- The walkthrough is a chance to listen, not to sell or overexplain.
- Clarify any unclear areas or priorities before starting.
- Set a tone of professionalism, care, and flexibility.

🚶 Step-by-Step: Initial Walkthrough Process

Politely Invite the Walkthrough

Say: 'Before I get started, would you mind showing me around so I can confirm what you'd like done today?'

Follow the Customer’s Lead

Let them walk you through the spaces. Nod, take mental notes, and ask clarifying questions only when needed.

Confirm Scope of Work

Say: 'Just to confirm—we’re doing the kitchen, bathrooms, and living area today, right?'

Ask About Special Requests

Ask: 'Is there anything you'd like us to focus on, avoid, or handle in a specific way?'

Clarify Any Grey Areas

Ask: 'Would you like us to tidy up personal items or leave them in place?' or 'Are there any delicate or off-limits items we should know about?'

Set the Tone

End with: 'Thank you for showing me around! I’ll get started now and let you know when everything’s complete.'

✨ Pro Tip to Elevate the Experience

If they mention something personal—like allergies, pets, or a recent renovation—make a mental note and acknowledge it later. It shows you listened and care.

✅ Initial Walkthrough Checklist

- Customer invited to walk you through the space
- Scope of work clearly confirmed
- Special instructions or preferences identified
- Delicate areas or items clarified
- Customer feels heard, respected, and confident

💳 Employee Training Manual: How to Collect Payment Professionally

Objective

To collect payment professionally, politely, and clearly—ensuring that customers feel respected and confident about the process, and that all payments are processed safely and correctly.

📌 Core Principles

- Never assume the customer owes—always check the payment status first.
- Be polite, non-pushy, and friendly when discussing payment.
- We prefer checks payments but we also accept online credit card, Venmo, and cash.
- The employee may accept tips or refreshments if offered—but may NOT accept material items like books, furniture, or personal belongings.
- If unsure about anything, contact your manager before accepting or processing payment.

🧾 Step-by-Step: Collecting Payment

Complete the Job First

Do not bring up payment until the job is complete and the customer is satisfied.

Ask Politely About Payment Status

Say: 'Just to confirm—have you already taken care of payment through the booking system?'

Check the Online System

Our booking system prompts the customer to specify how they plan to pay. Check your notes to see if payment has already been made.

Accept Payment If Needed

If payment is still due, let the customer know we accept:
- Credit card (preferred)
- Check
- Venmo
- Cash

Process and Record Payment

Follow the steps in the app or booking system to log the payment method. Store checks and cash securely until returned to the office.

If No Payment is Ready

Say: 'No problem—you can still pay online later today through your confirmation email.' Do not pressure the client.

Accept Tips or Refreshments (If Offered)

You may accept a tip or drink if the client offers, but do not hint, ask, or suggest tipping in any way.

Do NOT Accept Material Gifts

Do not accept furniture, valuables, clothes, or other belongings. Even if the client insists, politely say:
'Thank you so much, but I'm not allowed to take personal items—it's company policy.'

✨ Pro Tip to Elevate the Experience

If a customer seems confused or unsure, offer to show them how to complete their payment online—never rush or embarrass them about it. Just say, no problem, and I'll ask Jeanie to call them.

✅ Payment Handling Checklist

- Job completed and customer satisfied before discussing payment
- Asked politely and clearly if payment has already been made
- Accepted approved methods only (credit card, check, Venmo, or cash)
- Did NOT accept material items, even if offered
- Logged payment or noted online payment instructions for later

✅ Employee Training Manual: Final Inspection with the Customer

Objective

To complete every service with a final walkthrough inspection alongside the customer—ensuring their satisfaction, identifying any missed spots, and giving them a chance to provide immediate feedback before you leave.

📌 Core Principles

- The job isn't done until the customer has had a chance to inspect your work.
- Final inspections help catch anything missed and show you care about quality.
- Walkthroughs build trust and reduce follow-up complaints.
- Always be professional, open to feedback, and proud of the work you've done.

🚶 Step-by-Step: Final Walkthrough Process

Finish Your Cleaning First

Before you approach the customer, make sure all tasks are done, and the space is free of tools and trash.

Invite the Customer to Walk Through

Say: 'Would you like to take a quick look around to make sure everything looks good before I pack up?'

Walk Room by Room

Move through the home with the customer, pointing out key areas cleaned (especially any special requests).

Ask for Feedback

Be polite and confident. Ask: 'Is there anything you'd like me to take another look at?' or 'Are you happy with how everything turned out?'

Address Any Issues Immediately

If something was missed, fix it on the spot. Stay positive and thank them for pointing it out.

Confirm They're Satisfied

Once the customer confirms they're happy, let them know you'll pack up and be out shortly.

✨ Pro Tip to Elevate the Experience

Compliment something about their space during the walkthrough. A simple, 'You have such a beautiful kitchen!' adds warmth to the interaction.

✅ Final Inspection Checklist

- All rooms cleaned and free of supplies
- Customer invited to inspect the space
- Walkthrough completed room-by-room
- Customer had opportunity to give feedback
- Any corrections made before leaving

🗣️ Employee Training Manual: Thank You & Goodbye Script

Objective

To leave a positive, professional final impression by thanking the customer, confirming their satisfaction, and politely closing the appointment with warmth and clarity.

📌 Core Principles

- End every visit with genuine appreciation.
- Leave the customer with a sense of calm, satisfaction, and trust.
- Be brief, clear, and friendly.
- Encourage future feedback or booking without being pushy.

🗨️ Sample Script: Thank You & Goodbye

"Everything is all set and cleaned up. Thank you so much for having us today!"

"Was there anything else you'd like us to touch up or revisit before we go?"

"Great—if you ever have any questions, feel free to reach out through your booking or leave us a note for next time."

"We really appreciate your business. Have a great day!"

(*If they tipped or offered food:*)
"Thank you so much, that's very kind of you!"

📝 Extra Notes

If the customer is not home:
- Leave a friendly note or follow-up text if approved by the company.
- Make sure everything is left tidy and secure, per client instructions.

If customer had a concern earlier:
- Briefly confirm the resolution and thank them for their feedback.

✨ Pro Tip to Elevate the Experience

Make eye contact, smile, and say their name if you know it. Personal touches create loyal, happy customers.

🚻 Employee Training Manual: Bathroom Etiquette During House Calls

Objective

To uphold professional and respectful bathroom etiquette while inside a client's home—maintaining hygiene standards and ensuring client comfort at all times.

📌 Core Principles

- Always treat the client's home—including the bathroom—with the same respect you would give a guest space in someone else's home.
- Only use the bathroom for quick, essential needs (e.g., handwashing or emergency bathroom use).
- Do not use the bathroom for long visits or for bowel movements—plan ahead and use a public restroom if needed.
- Always ask politely before using the restroom, unless the client has already given permission in notes or during orientation.
- Leave no trace—wipe down any water, dispose of paper neatly, and wash your hands thoroughly.

🧼 Step-by-Step: Proper Bathroom Etiquette

Plan Ahead

Use the restroom at a gas station, café, or public location before or between appointments.

Ask Before Using

If you need to use the client's bathroom for a quick visit, always ask politely: 'Would it be okay if I quickly used your restroom?'

Avoid Bowel Movements

Do not use the client's bathroom to poop. This can be awkward for the client and can leave lingering odors.

Clean Up After Yourself

Wipe down the sink area if you wash your hands. Make sure the toilet is flushed and the seat is left clean.

Use Your Own Supplies

If you need soap or a towel and don't see any, use your personal hygiene kit instead of touching the client's items.

Be Discreet

Never talk about using the bathroom with coworkers or clients. Keep it professional and private.

✨ Pro Tip to Elevate the Experience

Some clients are very sensitive about staff using their bathroom. When in doubt, wait or find a nearby public restroom—it's always better to be safe and respectful.

✅ Bathroom Etiquette Checklist

- Used bathroom only when necessary and with permission
- Did not use client's bathroom for bowel movements
- Left the area completely clean and dry
- Used personal hygiene supplies if client's were unavailable
- Maintained professionalism and discretion

🙈 Employee Training Manual: Respecting Client Privacy & Avoiding Embarrassing Situations

Objective

To handle sensitive, personal, or potentially embarrassing client items with professionalism, discretion, and care—ensuring clients feel respected, safe, and never judged during our house cleaning visits.

📌 Core Principles

- We are in people's private spaces and must treat their belongings with total respect.
- We are not here to judge anyone's lifestyle, habits, or personal preferences.
- It's never appropriate to laugh, comment, gossip, or react to something you find in a home.
- Our job is to clean and organize, not to make assumptions or intrude on anyone's privacy.

🚫 Examples of Sensitive Items You Might Encounter

- Sex toys or adult materials
- Marijuana or smoking products (legal or otherwise)
- Medications or prescriptions
- Personal documents, money, or private journals
- Religious or political items
- Underwear, dirty laundry, or body care products

🧼 What To Do When You Encounter a Sensitive Item

Do Not React

Do not laugh, raise your eyebrows, comment, or make facial expressions. Stay neutral and calm.

Do Not Mention It

Never bring it up to the client or coworkers. Even if it seems humorous or interesting—just move on.

Move Respectfully (If Needed)

If you must clean the area, gently shift the item aside using a clean cloth or glove and return it to its spot when done.

Keep It Private

Do not share or discuss what you saw with anyone else. We do not tell stories about our clients.

If Unsure, Leave It

If you're unsure whether something should be moved or touched, clean around it and leave it in place.

✨ Pro Tip to Elevate the Experience

The more invisible and respectful we are when encountering personal items, the more trust we build with our clients—and the more likely they are to recommend us.

✅ Discretion Checklist

- No comments or reactions to private items
- Sensitive items handled (if necessary) with a cloth or gloves
- Nothing is moved unless absolutely required for cleaning
- Client never hears about or feels embarrassed by our visit
- Team members never share client information or stories

🧘 Employee Training Manual: Handling Angry or Aggressive Customers

Objective

To stay calm, professional, and safe when interacting with an angry or aggressive customer—resolving the situation respectfully without escalating it, and protecting your well-being and the company's reputation.

📌 Core Principles

- Stay calm and don't take it personally.
- Listen first—most people want to feel heard.
- Be respectful and never argue back.
- Set boundaries if someone is being inappropriate or unsafe.
- Report the situation immediately once you're safe.

🧼 Step-by-Step: Handling an Angry Customer

Stay Calm and Neutral

Take a deep breath and speak in a calm tone. Do not raise your voice or show frustration.

Listen Without Interrupting

Let them explain why they're upset. Often, being heard is enough to calm someone down.

Acknowledge, Then Redirect

Say something like: 'I understand you're frustrated. Let me see what I can do to help.' This shows you're trying to resolve the issue.

Don't Argue or Get Defensive

Even if you disagree, stay polite. Avoid phrases like 'that's not my fault.' Stay focused on solving the problem.

Offer a Clear Next Step

If you can fix the issue, explain how. If not, say you'll contact your manager or have someone follow up.

Remove Yourself If You Feel Unsafe

If the client is yelling, threatening, or behaving inappropriately, excuse yourself and leave the property. Then report the incident immediately.

🚫 Never Do the Following

- Don't yell back or argue, even if you're right.
- Don't insult the customer or take jabs.
- Don't ignore the issue or walk away without saying anything.
- Don't threaten, record them, or touch anything that could escalate the situation.

✨ Pro Tip to Elevate the Experience

Use names if you know them. Saying, 'I hear you, Mr. Davis,' builds a personal connection that can diffuse tension quickly.

✅ Resolution Checklist

- Stayed calm and didn't react emotionally
- Listened fully before speaking
- Responded respectfully and clearly
- Offered a reasonable next step or solution
- Removed yourself and reported the situation if unsafe

📣 Employee Training Manual: How to Handle Customer Complaints

Objective

To respond to customer complaints with empathy, professionalism, and problem-solving—turning a negative situation into an opportunity to build trust and satisfaction.

📌 Core Principles

- Stay calm, respectful, and non-defensive.
- Listen actively without interrupting.
- Acknowledge the complaint and validate the customer’s concern.
- Take responsibility when appropriate, and offer a solution or escalation.
- Always follow up or document the complaint properly for management review.

🧼 Step-by-Step: Responding to a Complaint

Listen Fully

Let the customer explain the issue. Make eye contact, nod, and avoid interrupting.

Acknowledge and Empathize

Say something like: 'I understand why that would be frustrating. I’m really sorry you’re feeling that way.'

Apologize if Appropriate

Even if the issue wasn’t your fault, you can say: 'I’m sorry this didn’t meet your expectations. Let’s make it right.'

Ask for Clarification

Gently ask for specifics if you need more details to understand the complaint.

Offer a Solution

If it’s within your power, resolve the issue on the spot. If not, assure them that you’ll contact a supervisor immediately.

Report or Document

Always report the complaint through the proper internal process so the company can follow up.

🚫 Never Do the Following

- Don’t argue or try to 'win' the conversation.
- Don’t blame the customer or another staff member.
- Don’t say 'It’s not my job' or 'That’s not my fault.'
- Don’t ignore or dismiss the concern—even small issues matter.

✨ Pro Tip to Elevate the Experience

Repeat back part of the complaint to show you’ve listened: 'So just to confirm—you said the floor under the bed wasn’t vacuumed?' This builds trust instantly.

✅ Complaint Handling Checklist

- Customer felt heard and respected
- Complaint was acknowledged without defensiveness
- Apology or empathy was offered
- Resolution was provided or next step was clearly explained
- Complaint documented or passed to management

🚪 Employee Training Manual: When to Leave a Customer’s Home & Escalate to a Manager

Objective

To recognize situations where your safety, comfort, or ability to do your job is compromised—and to know when it is appropriate to leave the customer’s home and escalate the situation to a supervisor immediately.

📌 Core Principles

- Your safety always comes first—no task or client is more important than your well-being.
- If something feels off, threatening, or inappropriate, trust your instincts.
- You are never expected to stay in a situation where you feel unsafe, disrespected, or harassed.
- When in doubt, leave professionally and call your manager.

🚨 Step-by-Step: When and How to Leave

Stop Immediately

If something happens that makes you feel threatened, unsafe, or extremely uncomfortable, stop what you’re doing.

Excuse Yourself Politely

Say something like, 'I'm going to step outside and make a quick call to my manager.' Avoid confrontation or accusing language.

Exit the Home

Remove yourself from the space calmly and respectfully. Take your cleaning gear with you if it’s safe to do so.

Call Your Supervisor

Contact your manager or lead immediately. Explain the situation clearly and calmly.

Do Not Re-enter

Do not return to the client’s home unless your manager instructs you to. Let management handle next steps with the client.

⚠️ Situations That Require Immediate Escalation

- The customer is yelling, threatening, or acting aggressively.
- Sexual, inappropriate, or uncomfortable comments or behavior.
- Drugs, weapons, or dangerous items are exposed in an unsafe way.
- You feel unsafe due to the location, condition of the home, or people present.
- You witness illegal activity or believe a crime is happening.
- You are being asked to perform duties that are not part of your job or are unsafe.

🗣️ Scripted Example (Optional)

"I'm not feeling comfortable in this situation and I'd like to step outside for a moment. I'll be calling my manager to check in before I continue."

✅ Safety & Escalation Checklist

- Left the space immediately without confrontation
- Informed supervisor as soon as possible
- Did not re-enter the space without approval
- Escalated due to clearly unsafe, threatening, or inappropriate situation
- Protected yourself while maintaining professionalism

🙏 Employee Training Manual: How to Apologize Professionally

Objective

To offer sincere, respectful, and professional apologies that acknowledge concerns, maintain trust, and reflect our high standard of customer care—even when the issue wasn't directly your fault.

📌 Core Principles

- A real apology shows that we care—not that we're guilty.
- Be direct, humble, and sincere.
- Acknowledge the concern without making excuses.
- Apologize once—then focus on solutions.
- A professional apology can turn a frustrated client into a loyal one.

🧼 Step-by-Step: Apologizing the Right Way

Stay Calm and Composed

Take a breath and speak with a calm, even tone. The goal is to stay grounded even if the client is upset.

Acknowledge the Issue

Even if you didn't cause the problem, say something like: 'I understand this wasn't what you expected.'

Apologize Sincerely

Use clear and simple language: 'I'm really sorry this happened.' or 'I apologize for the inconvenience.'

Avoid Defensiveness

Don't try to explain it away or say it wasn't your fault. Focus on making it right.

Offer a Solution or Next Step

Let them know how you'll fix it or who will follow up. Example: 'I'll make sure that gets corrected right away.'

Thank Them for Speaking Up

Say: 'I appreciate you letting us know. We want to get it right.' It helps close the conversation positively.

🚫 Avoid These Phrases

- 'It's not my fault.'
- 'I didn't do that, someone else did.'
- 'Well, you didn't mention that before.'
- 'That's just how we do it.'
- Excessive or sarcastic apologies like 'Sorry you feel that way.'

✨ Pro Tip to Elevate the Experience

Apologize with eye contact and steady posture. Body language matters just as much as your words when making an apology feel genuine.

✅ Professional Apology Checklist

- Apology delivered sincerely and calmly
- Issue acknowledged clearly
- No defensiveness or blame-shifting
- Solution or follow-up communicated
- Client felt respected and reassured