

Bradford Council

Telephone Skills Course

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Course Objective:

By the end of this course you will be able to:

Handle phone calls while presenting a professional image and stay in control of challenging situations

Your Objectives:

List your three main objectives below. What do you want to learn On this course? What do you want to take away with you? What do you want to become better at? What do you need?

1.

2.

3.

1 Serving People on the Phone

"I don't answer the phone. I get the feeling whenever I do that there will be someone on the other end."

Fred Couples

Objective:

By the end of this session you will be able to:

Understand callers' outlook when contacting Bradford Council and adopt effective strategies to become more comfortable in handling any situation

1.1 Why Telephone Skills?

We all know how to talk to our family and friends and that's how we usually start to learn how to communicate on the phone. However, professional calls are often different. Customers can be very time conscious and interested only in getting their problem sorted. A colleague may just want to know if something is taken care of, so he can inform others of the status of the project. Alternatively, a manager of a company may want to know if she can work with you as a supplier for their production line. In all of these cases, professional handling of a call can significantly increase the likelihood of customer or colleague satisfaction and increase efficiency.

1.2 What do You Want?

Above all, good telephone skills give you the following:

- Customer satisfaction ensuring returning customers and increased productivity Ability to present a professional image
- Personal satisfaction knowing that you have handled the encounter or issue well. This can reduce your stress and anxiety.

1.3 What Customers Want?

Customers have certain needs that must be satisfied before they can feel they were treated professionally. Knowing these needs is critical to the success of any CSR interacting with clients. The following list shows some of the most critical needs of a customer:

- They want to see effort
- They want to have options
- They want to be understood
- They expect speedy service, especially when in a hurry
- They are sensitive to confidentiality
- They want to be seen as important
- They want their needs to be satisfied
- They want value for money, not just a cheap service
- They like simplicity. They can't be bothered to understand the complexity of your service or products.
- They want to be treated consistently and fairly, especially in comparison with other customers
- They like reliable service in order to make better decisions.

People who call you can be external or internal to your company. Telephone skills are not unique to external customers. It applies to both types and you should use your skills to handle a phone call professionally.

Callers Want CASH!

When thinking of your callers, consider their needs:

Convenience. They want to spend a minimum of effort. Assume that customers are inherently lazy.

Action. People want results when they call. Remember that the issue must have been important enough for the customer to warrant the expenditure of time and effort to call you.

Speed. People want to see effort on your side. They want their issue or query to be resolved as quickly as possible.

Hassle-Free. Callers don't want a solution that requires effort on their part. They want a jargon-free, understandable explanation for their issues and often a quick solution.

All this suggests that callers are very sensitive to time and as *time is money*, satisfying their needs is similar to rewarding them with CASH!

1.4 Fundamental Principles of Customer Service on the Phone

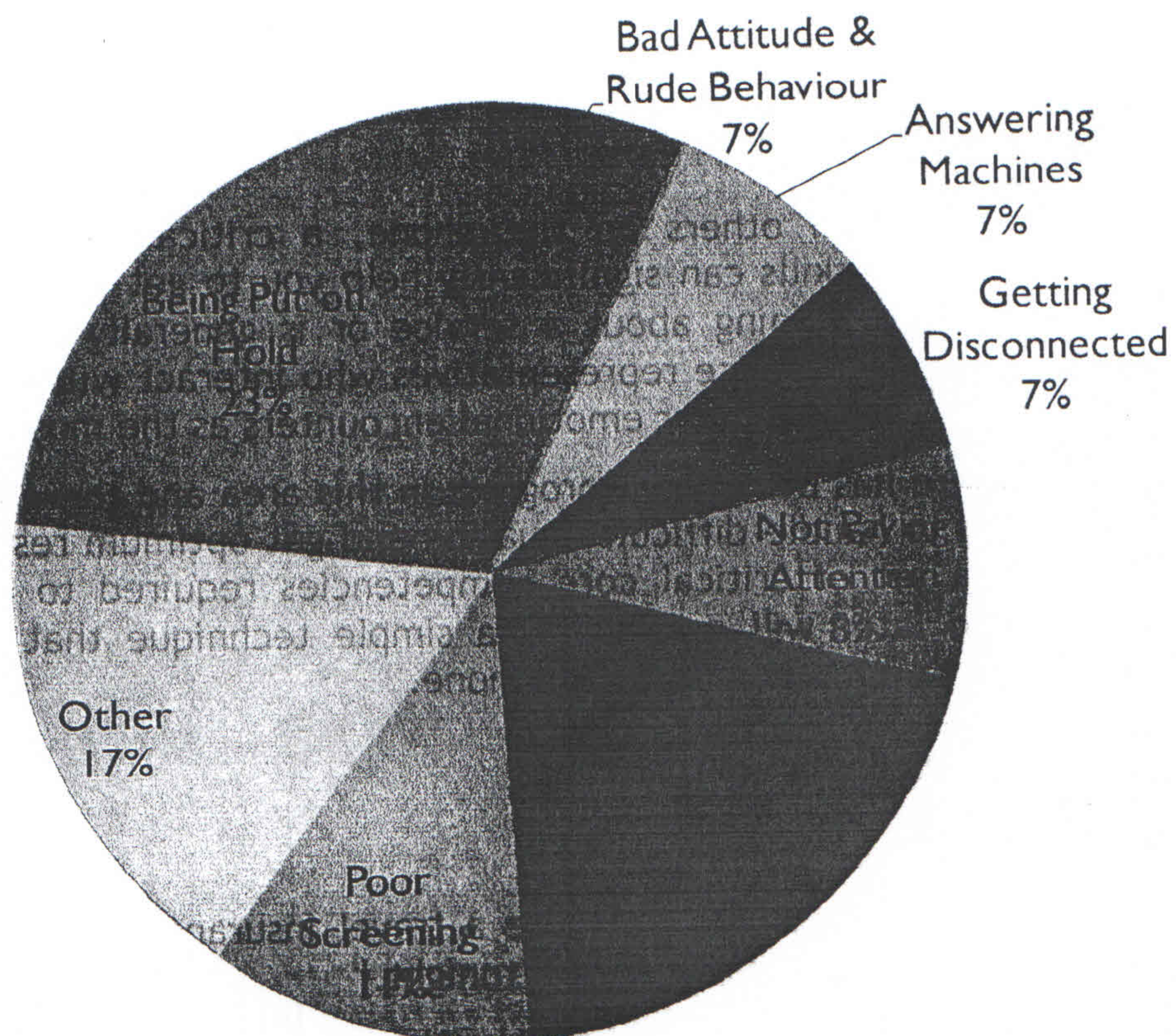
In analysing major call centres around the world, researchers have discovered that customers consistently want answers to the following questions (Brealey 2005):

- **Is anyone there?** The first concern for customer is to see if anyone is going to pick up the phone on the other side and how quickly would they do it.
- **Can you help me?** Is the Customer Service Representative (CSR) able to solve the customer's problem? Is he qualified and knowledgeable to do so?
- **Are you courteous?** Customers expect respect and want a *civil* exchange. How enthusiastic is the CSR to solve the customer's problem? Do the CSR care?

The above are known as the three universal customer service qualities that must be satisfied to present a service that customers or clients accept.

1.5 What Caller's Don't Like About Phone Conversations

Now that you have seen what callers expect from you, let's have a look at what they hate most while interacting through a phone with another person.



2 Emotional Intelligence

"In the last decade or so, science has discovered a tremendous amount about the role emotions play in our lives. Researchers have found that even more than IQ, your emotional awareness and abilities to handle feelings will determine your success and happiness in all walks of life, including family relationships."

By John Gottman, Raising an Emotionally Intelligent Child

Objective:

By the end of this session you will be able to:

Handle emotionally charged conversations on the phone while staying in control

When interacting with others on the phone, a critical factor is to consider emotions. Emotional skills can significantly help you to get better results when a caller is upset, complaining about a service or is generally emotional. Indeed, experienced customer service representatives who interact with customers on the phone regularly usually consider emotional encounters as the most challenging.

Fortunately, there has been much progress in this area and there are a number of easy techniques to handle difficult situation and get optimum results. You will be introduced to a set of critical core competencies required to boost *emotional intelligence* and later will go through a simple technique that can be used to establish *rapport* with a person on the phone.

2.1 An Example Conversation

Consider the following conversation:

- "My flights are cancelled. I have a travel insurance policy with you and I need help finding a place to stay tonight."

How should a CSR respond to this? Consider the following.

- "If you give me your policy number I can open your account."

This sounds rather cold. There are no emotions there. This can be improved by empathy such as:

- “I am sorry to hear that your flight is cancelled and you have to stay overnight. Please give me your policy number. I will see what we can do for you.”

Here you have taken advantage of a technique known as showing **empathy**. Empathy can have a significant effect as it helps you to establish rapport.

When trying to establish rapport with someone, you seem to be communicating in the same frequency, quickly understand what the other person means and can easily take steps to resolve issues as they arise. Naturally, when communicating with other (whether on the phone or not) you should always aim to establish rapport to enhance your communication. This can be achieved through empathy as well as having good emotional skills.

2.2 *Emotional Intelligence Competencies*

Emotional skills can be measured through a number of competencies. These were suggested by Daniel Goleman in his bestseller, *“Emotional Intelligence: Why it can matter more than IQ”*.

Emotional Intelligence is the ability to recognise your emotions and understand how these affect you and those around you. People with a high level of emotional intelligence can communicate very well and can easily connect with others. They can make good decisions as they understand themselves and know how not to get carried away by emotions. They are goal-oriented, know what they want in life, understand other people’s needs and concerns and take steps to address them. All in all, people with high Emotional Intelligence are quite successful and studies suggest that EQ matters more than IQ for a person’s success in life.

Goleman developed a framework that defined a number of critical emotional intelligence competencies. These are as follows:

- **Self-awareness.** This captures how much you know about yourself. High levels suggest that the person is confident, proactive, uses self-examination and is not afraid to find faults in himself.
- **Self-regulation.** This represents the ability to control one’s emotions. A high level suggests that a person can control his anger and emotions, is assertive and can say no.
- **Self-Motivation.** People with high emotional intelligence are usually highly motivated. They like challenges and retain a positive attitude when dealing with them.
- **Social Awareness - Empathy.** This is a critical ability where a person can understand the needs, concerns and feelings of others. People who are empathic can easily communicate with everyone, establish rapport, share their inner thoughts and understand people’s world view. This helps them to establish strong relations with people and to become more successful in life.

- **Social Skills.** This captures the ability to interact with others and work as part of a team towards a mutual goal. People who are good at this can easily manage conflicts, handle disputes, solve misunderstandings and manage others.

How do Emotional Intelligence Competences translate to Telephone Skills?

SELF AWARENESS

- **Be proactive** - If an interaction on the phone didn't go as you desire then try to work out if you could have done something better. Think proactively. Never blame the caller, because this way you would never learn from your mistakes. A proactive attitude allows you to see the situation from the caller's point of view.
- **Emotional Awareness** - Recognizing ones emotions and their effects. People with this competence Know which emotions they are feeling and why. Realize the links between their feelings and what they think, do, and say. Recognize how their feelings affect their performance. Have a guiding awareness of their values and goals.
- **Self-confidence** - Sureness about one's capabilities. People with this competence present themselves with self-assurance; Have presence
- Are decisive, able to make sound decisions despite uncertainties.

SELF REGULATION

- **Self-control:** Managing disruptive emotions and impulses. People with this competence manage their impulsive feelings and distressing emotions well. Stay composed, positive, and unflappable even in trying moments. Think clearly and stay focused under pressure.
- **Be assertive.** People with this competence don't get angry or emotional on the phone, no matter what the other person says. Remember you can always hang-up and there is no physical harm involved. Listen careful and use empathic and assertive communication to express your opinion without sounding aggressive. Remain calm and self-aware and you will refrain from getting emotional. Refuse to take it personally no matter how emotional the conversation gets.

SELF MOTIVATION

- **Be positive.** Always use a positive language in your conversations and believe that you are here to serve others as best as you can. Remember as long as you are putting *effort* and showing *respect* you are doing the right thing.

SOCIAL AWARENESS

- **Empathy.** Sensing customer's feelings and perspective, and taking an active interest in their concerns. People with this competence are attentive to emotional cues and listen well. Show sensitivity and understand others perspectives. Strive to customer satisfaction based on understanding customers needs and feelings

SOCIAL SKILLS

- **Communication:** Sending clear and convincing messages. People with this competence Are effective in give-and-take, registering emotional cues in attuning their message. Deal with difficult issues straightforwardly. Listen well, seek mutual understanding, and welcome sharing of information fully. Foster open communication and stay receptive to bad news as well as good.

2.3 Empathy

- **An acknowledgement tactic**

Acknowledgement tactics are surprisingly powerful, considering how easy they are to learn. They are the most important tactic you will come across.

- **Empathy PROVES to the customer that you understand his emotional state.**

And they are most effective when you demonstrate that you also understand WHY the customer is upset.

- **Empathy statements do not involve AGREEING with or condoning the customers behaviour, be it anger, hostility, sarcasm**

We need to be absolutely clear that empathy statements do not involve agreeing with the customer, or condoning his or her abusive behaviour. Empathy statements convey that you are interested and concerned and that you understand Nothing more and nothing less.

- **Empathy allows the employee to relate to the customer in a non bureaucratic way.**

In a way that recognize that the customer is unique human being a person with unique reactions.

- **Short and to the point, and uncluttered with other detail.**
- **Empathy statements should not include the word BUT.**

Remember what it was like when you took your school report home. A parent would say "Well done, you got an A, BUT that English mark has got to improve".

What do you remember the compliment or the negative comment? It works the same for Empathy.

"I realize you've been waiting a long time BUT these people were before you"

Or

"I know this is upsetting BUT you have to follow the procedure"

Replace BUT with a pause. "I realize you have been waiting for a while, [pause] There are a number of people who have been here quite a while.

- **Requires the proper tone of voice**

You can make empathy statement sound sarcastic, aggressive or patronizing by the tone of voice you use. The best tone for empathy statement calm, matter of fact tone, so that it is clear to the customer that you have no hidden agenda and that you are making a simple statement of fact, rather than an accusation.

EMPATHY FORMULA . All you have to do is to show that you are concerned. This is accomplished by using a simple formula.

1. First, state your understanding using a phrase such as the following:
 - "I understand ..."
 - "I appreciate ..."
 - "I am sorry to hear ..."
2. Next, rephrase and mirror the statement the caller has just told you to show that you understand his or her concern. Try to use your own phrases to sound more convincing and it also shows that you have actually listened to the customer.

"I understand why you maybe upset by,"

"I can see you are angry about.....,"

"I can understand how frustrating it is .."

"I realize how complicated it is to ..."

"I cannot imagine how upsetting it is to..."

"I know how confusing it must be to..."

2.4 Tone of Voice

Research shows that % of the content of a conversation on the phone is carried through tone alone and words account for the remaining

Consider this carefully for a moment. It does not suggest that all communication is subject to this ratio. The researchers found that this ratio applied only to emotional conversations. In other words, when a caller is angry, upset or

emotional, your tone of voice can have as much as 82% effect in comparison with what you actually say. This finding emphasises the need for remaining calm and in control if a caller sounds agitated and impatient. Your calm manners are contagious and the caller will eventually match your style and tone of voice.

PRACTICE: EMPATHIC REPLIES

Consider the following statements from callers. Reply to them with an empathic sentence and tone based on the guidelines covered in this session.

Caller Remark	"The dishwasher I bought from you got blocked after the second use and completely ruined my kitchen."
Your Reply	
Caller Remark	"The central heating system you installed doesn't do anything. My 8 year old girl caught cold 2 days ago and temperature sensors show a reading of about 8 degrees even when the heating is fully turned on."
Your Reply	

Caller Remark	"The ticket machine ate my credit card and I missed my train thanks to your broken machine!"
Your Reply	

2.5 Assertiveness

- Do you find it difficult to say no?
- Can you always ask for what you want?
- Do you feel that you sometimes are being treated like a doormat?
- Do people sometimes find your comments/reactions aggressive?
- Do you feel guilty if you think you have not been nice enough?

ASSERTIVENESS.

When we behave assertively we stand up for our own needs, opinions or rights without violating those of other people. We convey this confidence in our respect for others in our verbal expression.

In other words, we acknowledge that there may be different, and equally valid, points of view and that others have different experiences.

Asking open questions so that you can find out what other people think or want in any given situation.

Suggesting possible courses of action to other people and not giving heavy-handed advice of the "you should" variety

Submissive Behaviour over the phone

Voice

- Sometimes wobbly
- Tone may be singsong or whining
- Over-soft or over-warm
- Often dull and in monotone

- Quiet, often drops away at the end

Speech Pattern

- Hesitant and filled with pauses
- Sometimes jerks from fast to slow
- Frequent throat clearing

Aggressive Behaviour over the phone

Voice

- Very firm
- Tone is sarcastic
- Sometimes cold
- Hard and sharp
- Rises at end, often shouting

Speech pattern

- Fluent
- Often abrupt, clipped
- Emphasises blaming words
- Often fast

Body talk - can we sense body talk down the phone?

Submissive

- hand-wringing
- Hunching shoulders
- Stepping back
- Covering mouth with hand
- Nervous movements which detract
- Shrugs and shuffles
- Arms crossed for protection

Aggressive

- Finger pointing
- Fist thumping
- Sits upright or leans forward

- Stands upright head in air
- Strides around impatiently

Assertive Behaviour over the phone

Voice

- Steady and firm
- Tone is middle range, rich and warm
- Sincere and clear
- Not over-loud or quiet

Speech pattern

- Fluent
- Emphasises key words
- Steady, even pace

Facial expression

- Smiles when pleased
- Jaw relaxed but not loose

Body talk

- Stands upright or relaxed - not slouching or cowering stands with head held up
- Open hand movements inviting to speak getting Information

3. Lowering Language Barriers

Objective:

*By the end of this session you will be able to:
To ensure our services are more accessible and inclusive.*

3.1 Which of these phrases do you prefer to use - when talking with other professionals?

- People with limited English
- Non-English speaker
- People who need help with English
- English as an additional language [EAL]
- ESOL speaker [English for Speakers of other languages]
- A Polish speaker

3.2 Tuning in

- When we first come into contact with a customer we need to go into a process of "Tuning in"
- You need to tune into the customer; the customer needs to tune into you.
- You have 18% words 82% tone to help you tune in

3.3 How do you tune in to your customer?

- Small talk
- Linguistic rapport
- Assess level of English

Employee: "Have you been here before?"
Customer: "Yes"
Employee: "The weather is nice"
Customer: "Yes"

What is your ASSESSMENT of the level of English in this above dialogue?

Outbound calling, you ring a customer that has just been "tuned in" to a programme or another conversation

Employee	"Hello, this is Sara from Benefits Section, Bradford Council"
Customer	"Yes "

What is your ASSESSMENT of this dialogue?

3.4 To repeat or not to repeat?

If a caller doesn't seem to understand, should you

- [a] repeat what you said?
- [b] rephrase what you said?

3.5 Ways of communication

Which are most challenging for people who are learning a language?

Speaking	Listening and understanding
Reading	Writing

3.6 Block capital or sentence case?

Which is easier to read? Why?

[A] Go to Epping Road office on Monday 23 June at 2pm. Ask for the Duty Officer.

[B] GO TO THE EPPING ROAD OFFICE ON MONDAY 23 JUNE AT 2PM. ASK FOR THE DUTY OFFICER.

3.7 Difficult types of words

- **Concepts/abstracts:** *priority, facilitate, safe-guarding, confidentiality, person-centre.*
- **Acronyms, Names / Titles:** *RSVP, ASBO, Scheme Manager, HomeSwapper, Support Worker, Project Coordinator*
- **Contractions:** *couldn't, isn't, you're, shouldn't've,*
What is the difference in sound? Say the word in full.

- **Technical words:** *impartial, eligible, early learning, legal guardian.*
Picture cards and visuals are useful.

Look at the lists below. If you took a picture of these, what would you see in the photo?

[a] Licence, contract, document, agreement, form tenancy, policy, order, bond guarantee, report, plan notice, statement.

[b] Benefits, allowances, rent, arrears, amount, fine, contribution, expenditure, maintenance, payment

[c] Operative, advisor, member, contractor, officer, non-dependant, team, leader, manager.

3.8 Helping customers understand technical words

- Use the simple word *so they know they know, basically, what you are talking about.*
- Use the technical word, *if needed. Repeating this word helps reinforce it.*
- Call the customer "you" and your organisation "we"
- **Chunking**, *is when you break down sentences into segments. This allows space - and time - for customers to catch up, process and understand what you have said.*
- **Repeating key words** *also helps reinforce information and slows the pace of new words for the listener*

Why do customers say they understand when they don't?

4. Getting Information

"In business, you don't get what you deserve, you get what you negotiate."

Chester L. Karrass

Objective:

By the end of this session you will be able to:

Ask ideal questions from callers to maximise information transfer

Asking questions is a fundamental part of effective communication and exchange of information. By asking the right question at the right time, you get access to more information, can manage people more effectively and build stronger relationships by avoiding misunderstandings.

2.6 Questions

Questions are a powerful way of:-

- Learning about your caller
- Accessing more information
- Relationship building
- Avoiding misunderstandings
- Information connection / confirmation

2.7 Open Question prefixes

- Describe to me...
- Talk me through...
- Explain to me...
- Tell me more ...

- Is there anything else that I haven't asked that might be useful to know?

2.8 Block of 3. Avoid interrogation, stick to 3 questions in the following way:

- Firstly, can I start by taking your name, And now your address? Thank you and your date of birth....

OR

- So that I can help you, it is normal to confirm a few details. Firstly, starting with your name and address, Thank you and your date of birth.....

2.9 ALLY words - positive and upbeat!

- | | |
|----------------|-----------------|
| • Specifically | • Secondly |
| • Firstly | • Precisely |
| • Finally | • Normally |
| • Normally | • Recently |
| • Typically | • Traditionally |
| • Generally | • Completely |
| • Currently | • Hopefully |
| • Previously | • Exclusively |
| • Roughly | • Currently |

SIGNPOSTING

Letting the customer know where they are in the conversation is important. If your customer needs to complete a process, tell them. Example:

“This process is going to take 8 minutes, are you sitting comfortably?”

If you are completing a form, tell the customer you are doing this and how long it will take. Signpost to relax customer and to ensure they know what is going to happen next on the phone. Customers react better and cooperate when they are informed and understand the reasons behind your questions or actions. Example:

“It may go quiet for a little bit as I need to complete the details section of the page, I won't keep you too long, is this ok”

Call handlers should almost narrate the phone call as it occurs, letting the customer know exactly what's happening at each step of the way. Example:

“So that I am able to troubleshoot accurately to figure out why the dishwasher isn't cleaning the way it should, I need to ask you some questions ”

5. Telephone Etiquette

Objective:

By the end of this session you will be able to:

Handle your phone conversations professionally and leave a positive impression on the other person

PRACTICE: INITIATING PHONE CALLS

Follow the instructions in the handout given by the tutor and use the space below to capture the positive and negative qualities of phone calls.

Scenario A- your comments HERE

Scenario B- your comments HERE

5.1 Making a Phone Call

WHEN MAKING OUTBOUND CALLS...

1. Identify yourself.
2. State your company.
3. Explain why you are calling.
4. Make sure the person has time to listen to you.
5. Proceed with information exchange.
6. Understand the customers concerns and provide solutions or alternatives courses of actions.
7. Explain to the customer what will happen next.
8. Ask if the customer needs anything else.
9. Let the customer finish the call

Guidelines:

- Call when you promised to call.
- Be prepared. Have all the information you need at hand before you make the call.
- Use a calm and respectful tone at all times

5.2 Receiving a Call

Consider the following conversation taking place on the phone:

You: "Hello"

Caller: "Is that XYZ Corporation?"

You: "Yes"

Caller: "I want the marketing department please."

You: "This is the marketing department."

This takes too much of your time and the caller's time. Instead, you should provide the info upfront to minimise the length of this encounter.

When you receive a call, pick up the phone and state the following:

1	Start with a greeting	"Good morning/Good afternoon"
2	State your company name or department	"Human Resources department"
3	State your own name	"Margaret, Margaret Thompson speaking"

As you can see, this provides all the information in one chunk and allows the caller to move on to their query. However, going through all three can be too much especially if you have to repeat them over and over again. You may appear robotic or the sentence might get muffled over time due to repetition. Instead you can vary it by using only two statements of the three presented here. The changing pattern allows you to show enthusiasm while still covering the critical information upfront. As an option you can finish the statements with, "How may I help you?"

5.3 Closing a Call

Suppose you want to close a phone call. Consider the following closing statement:

You: "Ok, Mr. Stevens, I don't think there is anything else I can do for you. Call us back in a week time. Bye."

It's rather cold, unhelpful and somewhat rude. The caller is left with a very negative impression. This is exactly what you want to avoid. When you had a suboptimal conversation, closing properly can significantly improve your image since people have short memories and are more likely to remember your good professional handling at the end of the conversation more than at the beginning of it.

When closing a call use the following steps:

Step	Example
Thank the caller for calling	"I enjoyed working with you on this issue" "Nice talking to you"
Appreciate the caller's time and effort	"Thanks for letting us know about the issues" "I am glad we were able to help" "I really appreciate the time you spent to let us know about the recent developments"

Provide a summary of key points covered and agreed	"So, the agreement is that we will refund your purchase within 15 days"
Reassure that any promises will be kept	"We will certainly look into this so it won't happen again"
Specify what happens next	"So, I am expecting a copy of your insurance cover letter within a week"
Anything else	"Is there anything else I can do for you?"
Thanks and say good-bye	"Thanks for your call"
	"Thank you"
	"Have a nice day"
Warm feeling	"You are welcome"
	"My pleasure"
	"Enjoy your holiday"
	"Hope you get well soon"
	"Happy to Help"

DO NOT DROP THE WARM TONE UNTIL THE END OF THE CONVERSATION

5.4 Summary of a Call

So as a summary, you should go through the following steps when answering a call:

Open the Call	Start with a greeting
	State your company name or department
	State your own name. Margaret, Margaret Thompson
Body of the Call	Listen to the query
	Establish rapport by making an empathic statement
	Ask open questions to understand the problem better
Close the Call	Provide solutions
	Thank the caller for calling
	Appreciate the caller's time and effort

	Provide a summary of key points covered and agreed
	Reassure that any promises will be kept
	Specify what happens next
	Anything else
	Thanks and say good-bye

5.5 Picking up Someone Else's Phone

Sometimes you may need to answer someone else's phone. There is a technique to this which helps you sound professional and also reduces your stress.

Here is how it works:

Order	Step	Comments
1	<i>Prepare before picking up the phone</i>	Before answering find a pen and paper so you are ready to take notes when you pick up the phone.
2	<i>Pick up the phone</i>	
3	<i>State the person's name and then your name</i>	Example: "Jane Brown's phone, Meg Clark speaking"
4	<i>Take Notes</i>	Make appropriate notes to hand over to your colleague. Detail provided below.
5	<i>Repeat the notes back to caller</i>	Repeat the information back to the caller to check for correctness especially if the call is critical and important.

When taking notes, you need to consider the following details as a minimum:

Caller's Name	Time / Date Contacted
<input type="text"/>	<input type="text"/>
Caller's Organisation	
<input type="text"/>	
Caller's Contact Details (Phone or e-mail)	
<input type="text"/>	
Message	
<input type="text"/>	
Required Actions	
<input type="text"/>	
Your Name	
<input type="text"/>	

Remember:

- Required actions can be those on your behalf or on the target person's behalf
- Don't forget to record who it was that took the message (your own name) so your colleague can get to you if clarification is required. If neglected, this can reduce efficiency.

5.6 Putting on Hold

In order to process the customers' requests, sometimes you may need to put them on hold. If you handle this correctly, then it's perfectly OK and understandable. However, it is also easy to leave a really bad impression if the customer doesn't know what you are up to and how long he or she has to wait.

You can follow a number of simple guidelines to stay on the right track.

- 1 *Let the customer know why you are putting them on hold.*
- 2 *Tell the customer how long you will put them on hold for.*
- 3 *Ask for permission before you put the customer on hold.*

To Place Someone on Hold

- May I put you on hold for a moment while I look that up/handle that issue/etc.?
- If you could hold for a moment. I would be happy to look that up/handle that issue/etc.
- May I please put you on hold for a moment.
- Would you like to hold for a moment or would you like for me to call you back?
 - Remember to wait for the caller's answer.
 - If it takes you more than one minute, pick the telephone back up and let the caller know you are still working on finding a resolution.

5.7 Wrong Department

Suppose someone calls you and you realise that they should have been connected to a different department. Consider using the following statement:

You: "You have got the wrong department."

This suggests that the caller has made a mistake. Now consider this,

You: "You have not been put through to the right department."

This suggests that your colleague has made a mistake. None of the above statements are useful or positive.

Instead you can use the following guidelines:

Ask probing questions to get more details

"What is it you wanted to query about?"

Advice who they need to talk to for this

"I see, for this issue you need to talk to our repair centre"

Opt 1: "I will transfer you to them now"

Opt 2: "You need to contact them at X"

5.8 Transfer

Transferring a call is very similar to putting on hold. Follow these steps:

Order	Step
1	Tell who you are transferring to
2	Explain why
3	Explain what the new contact knows
4	Explain what happens if they could not get a response (optional)
5	Give phone number (optional)
6	Transfer the call (optional)

To Transfer

- Let me put you in touch with (Person's Name/Department's Name). He/she/they can handle that for you.
- (Person's Name/Department's Name) is the subject matter expert. I can connect you with him/her/them.
- (Person's Name/Department's Name) can help you with that. One moment and I can put you through.
 - If appropriate give the extension to the caller.
 - If possible, stay on the line and introduce the caller to the person/department who can help

Example:

CSR: "Let me put you in touch with our accounting department. They can process your payment. Is that OK?"

Customer: "Sure"

CSR: "I'll explain to them about your situation, so they can process the payment for you straight away."

Customer: "Good, thanks"

CSR: "Ok, I am transferring you now..."

Options (Not connected):

CSR: "If you could not get hold of them, please call back and ask for Jane and I'll tell you what to do next."

Options (Phone number):

CSR: "Here is the phone number for the accounts department."

The critical part of this response is to make sure that you **keep the customer informed**. As long as the customer knows what is happening and you have asked their permission before transferring them and they know what will happen when they get connected to the other side, you have handled the call professionally.

5.9 When a Customer Thanks You

- It's my pleasure.
- I'm glad to be able to help.
- You are welcome. Is there anything else I can help you with today?

5.10 When a Customer is Frustrated

- Let me see if I can help you work through this issue.
- Let's take it from the beginning and see if we can work through this together.
- I can hear that you are upset, and I do want to help you.
- I'm listening to you....
- If appropriate, repeat what the caller has said. Reframe any negative statements into solution-oriented ones.
- Stay calm. If the customer needs to vent, don't jump to the solution too quickly. The caller may not be ready to listen to you yet.

PRACTICE: PUTTING ON HOLD

Consider the following case studies. How do you handle each case? Write your responses and discuss with the group.

A customer called your Camera Sales Department to enquire about the status of the repair of their camera. You realise that they must have got the wrong department and they really need to contact the Repair Centre for this.

You need to enquire from your manager about the information just given to you by the customer. This might take only a minute if your manager can be reached.

You need to transfer the customer to your colleague in a different department. You don't know if your colleague is at her desk and your colleague doesn't know anything about your customer.

6 Dealing with People

“There are two types of people; those who come into a room and say, ‘Well, here I am!’ and those who come in and say, ‘Ah, there you are.’”

Frederick L. Collins

Objective:

By the end of this session you will be able to:

Handle phone calls based on the types of people you are communicating with

Some people are not very talkative on the phone while others do not want to stop talking. To handle everyone well, you should first identify what type they belong to and then proceed to handle them accordingly. In this session, you will learn about different types of callers and learn about best strategies to deal with them.

6.1 Passive Caller

Type:

- They won't volunteer information
- They may not share their needs
- They can be quiet

Handling:

- Periodically ask for their needs
- Ask probing question. Use open questions to get more information.
- Use spaces between your sentences to encourage the caller to fill the gap. This technique is known as *silence technique* which is extensively used in negotiations to effectively 'force' the other party to provide more clues about their positions.

6.2 Talkative Caller

Type:

- They seem to have a lot of time
- They are charming to talk to though can easily go off-topic

Handling:

- Ask closed questions to confirm facts and restrict the scope of the conversation
- Use less space between your sentences to discourage interruption by the caller so you can keep the conversation focused
- Use short answers to discourage talking about topics other than the current business

6.3 *Repeat Caller*

Type:

- The customer keeps calling back despite being told about a situation.

Handling:

- Initially, explain that there is not much you can do. If calls are repeated, explain that there is not much they can gain by calling. Finally explain what will happen if they call again.

Here is an example:

1. First call. Answer by,
 - "As I stated earlier, you need to wait until tomorrow before you can talk to the manager"
2. Second call.
 - "I really can't do much at this point and I suggest you save your time and instead call back tomorrow."
3. Third call.
 - "If you call again, I would not be able to tell you any more than I have already and I will simply state the same thing again. This could be a waste of your time. You will get better results if you wait until tomorrow."

6.4 *Demanding Caller*

Type:

- Want a lot for their time or money
- They are to the point. They are task oriented and interested only in business. Non business talk is kept to a minimum

Handling:

- Don't take their demand or aggressiveness personally.
 - They are time conscious and focused on getting more.
 - They are interested in the business and you are just the person at the gate which is letting them (or preventing them) to get what they want.
- Be direct and to the point when answering or clarifying.
- Avoid arguments.
 - If they act aggressively or try to make a point, accept it and move on. Any negativity or stating "but" would immediately lead to an argument. A customer usually wins an argument since you are more

restricted in dealing with them that they are with you, so avoid getting into an argument in the first place.

- Focus on what you can do for the customer within your capability.
- Don't take the bait to have a philosophical conversation about a business issue. This will only lead to a heated debate and will become more difficult to get out the longer it goes. For example, don't get into a discussion of why you have a particular company policy, why your pricing structure is the way it is and so on.
- Keep a calm and friendly tone at all times.

6.5 *Angry Caller*

Type:

- A caller is angry about your products/services or treatment.

Handling:

- When dealing with an angry caller, the highest priority is to:
 - ***Save the relationship***
 - ***Solve the problem***
- Let the person share their mind with you. In short, let them get it out. This doesn't mean you should get affected by it.
- Remember, the caller is not angry at you but the system, the product or the treatment he has received. Work to identify the root cause of the problem and reassure them that you have their best interest in mind.
- Probe for facts. An angry person is usually emotional and can easily exaggerate.
 - Don't respond to the exaggeration or acknowledge it. Instead deliver your sentences filled with pure facts.
 - Don't deny the statements on exaggerations you hear from the caller. This will shift the conversation to discussing the validity of the exaggeration. This will not get you anywhere. Instead, ask closed clarification questions and show that all you want to know is the set of facts to provide a more effective help.
- An angry person wants a reaction from you. Provide it to them by:
 - Saying 'sorry' in a way that shows you mean it. This will satisfy most people.
 - An angry caller wants to show that their time is wasted, their intelligence has been questioned or they have been insulted. Whether true or not, it is still a good idea to say "sorry". Since they know it might not have been your fault, saying sorry can have a very positive effect on an angry caller.
- Show respect and put effort to resolve the caller's issues. Do as much as you can to help a caller. This will satisfy most people.
- Be as empathic as possible.

6.6 Continued Aggression

Sometimes, an angry caller may lose it and become more aggressive. To handle the situation, you can progressively warn them on what you might do. The following example illustrates:

1st Warning:

“Mr, Robertson, I really like to help you, but if you keep on shouting I won’t be able to do so.”

2nd Warning

“I’m sorry Mr. Robertson. I cannot be spoken to like this. If you continue to shout I will terminate the call.”

Usually, after giving the second warning, most people take the hint and realise how far they have drifted off. They often apologise and calm down or even say that they didn’t mean to upset you.

Sometimes, this might not be enough in which case you can simply terminate the call. Whatever the job, you are not expected to respond to such callers. In addition, anger is an accumulative emotion. With time, the person will cool down. When they call later, they might not even be angry anymore. You can then move on to handle their case in a better environment.

IMPACT IDENTIFICATION EXERCISE

Listed below are a number of behaviours, which some people would describe as aggressive. Although the effect of these may vary according to circumstances, please rate these according to the extent to which you consider each is likely to have an impact on you if you had to deal with a person exhibiting the behaviour in cases where it might be over the phone or face to face (where appropriate)

The rankings are as follows:

A - an extremely high impact B - high impact C - moderate impact

D - slight impact E - no impact

Dealing with a person who:

No	Behaviour	Impact Face to Face	Impact Over the Phone
1	Being sarcastic		
2	Critical of you & your abilities		
3	Being rude		
4	Swearing as part of general speech		
5	Shouting		
6	Using obscene language.		
7	Making personal comments about you		
8	Constant eye contact/staring		
9	Threatening you		
10	Talking over you/not listening		
11	Banging desks		

No	Behaviour	Impact Face to Face	Impact Over the Phone
12	Pointing/jabbing		
13	Spitting		
14	Threatens to complain about you		

PRACTICE: CALLER TYPES

Consider the following cases. For each case:

- Identify the type of the caller.
- Analyse the situation and present your strategy to handle the call.
- What would you say?

Conversation	<p>Customer:</p> <p>"Hi, Julie. This is Mark. How is it going? I heard that you are opening a new branch in Bristol in the new shopping centre. Business must be going well? Did you hear that they discovered a World War 2 bomb when excavating the site? Imagine that..." [carries on talking]</p>
Type	
Analysis	

<i>Your Response</i>	
<i>Conversation</i>	Customer: “I am shocked to see that you have increased your prices. How can you do that? It is already too expensive. You say you are good at sales. Well, if increasing prices mean being good at sales, then I have to start questioning everything else you do. I want you to sell me the products with previous year’s prices. I am not paying anymore than that!”
<i>Type</i>	
<i>Analysis</i>	
<i>Your Response</i>	

Conversation	<p>Customer: "Hi, I am interested in your heating products...[GAP]...can you tell me about them".</p> <p>You: ... you provide some information...</p> <p>Customer: "I see...[Pause]"</p>
Type	
Analysis	
Your Response	

7 Giving Information

"Trust yourself. You know more than you think you do."

Benjamin Spock

Objective:

By the end of this session you will be able to:

Provide information clearly and efficiently while increasing retention and checking understanding

To improve the communication, you need to use a number of proven guidelines that reduce the chances of misunderstanding and help to utilise time as best as possible.

7.1 Example Conversation

Consider the following conversation:

- Caller:** "I tried to use your new time logging software, but I am kind of lost."
- CSR:** "No problem, tell me what the problem was and I will help you."
- Caller:** "Well, emm, to be honest I don't really know what the problem is? It just freezes over when I press the button after I fill in all the boxes."
- CSR:** "That could be due to our server patch implementation. We are using Server 7.0 now and this means all inbound requests are directed to HTTPS server."
- Caller:** "Ok, I am not sure I am following. I just want to enter my details into the system."
- CSR:** "Oh, I see. Well that's easy all you need to do is to go to our HTTPS server, login, go to scheduling, under usernames, find 'Secure Entry', then enter the number shown at the top next to the curly icon and press OK 3 times. You should see a welcome screen, though I was told some people who use Firefox may not see this screen, but I am not sure. Follow this

and if you had any problems call us back. Is there anything else I can help you with?"

Caller: *[Lost and baffled]*

In this conversation, the caller is getting more and more confused. The CSR is making many mistakes:

- CSR is asking general questions without structure.
- CSR is using a lot of jargon which don't mean anything to the caller.
- The explanation is given in one long sentence.
- The guidance has many steps that are easy to confuse if not followed accurately.
- CSR doesn't seem to be sure how the system should respond which reduces the caller's confidence in the guidance given.
- There is no checking or feedback to make sure the caller has understood the correct sequence.
- The caller is likely to still have problems after the call which is wasteful for both parties.

To address these issues and provide information in a way to maximise usefulness, you need to use the following guidelines.

7.2 Guidelines

- **Reduce pace.** Provide information in a slow pace. Concepts are usually much easier to understand if a person is familiar with them. As an expert who is going to provide information, you would naturally talk faster than the other person can understand due to their unfamiliarity with the subject. You need to put conscious effort to reduce your pace, sometimes to a level which might be painful to you, though suitable for the other person.
- **Use less jargon.** Reduce technical words. The best way to achieve this is to phrase your sentences based on a caller's needs. This also encourages you to understand their needs, and therefore deliver a better guidance.
- **Use chunking.** Research suggests that the capacity of our short term memory is about 7 ± 2 . If you are going to provide a step-by-step guidance involving 10 steps or more, you cannot expect the other person to keep it in their head. For some people (and depending on how tired they are) this can be as low as 5 steps. If you have more to say, you need to chunk the information down to a smaller number of pieces.
- **Use recap and refresh.** When you explain something, it is always possible that the caller may not fully understand your explanation. They can be new to the subject or your product, they may find your accent difficult to understand, the line quality might not be good or there could be many other reasons. It always pays to refresh their mind and check understanding by providing a summary. This also improves your professional image.
- **Provide auxiliary content.** Ideally, when you have to provide a step by step approach, you should always guide the person through the process. This way you can provide the information as you go without overwhelming the caller. This is however not always possible (e.g. when the steps take a long time to execute). In this case, you should provide written or visual

guidelines so the caller can use it as reference. Emails, websites or company flyers are ideal solutions.

7.3 Improved Conversation

Let's have a look at an improved conversation to see how this works in practice:

- Caller:** "I tried to use your new time logging software, but I am kind of lost."
- CSR:** "No problem. What was exactly the problem you experienced?"
- Caller:** "Well, I am unable to enter my details into the system."
- CSR:** "I see. Can you login and enter your details in the boxes?"
- Caller:** "Yes, I did that. But when I press the button after I fill in all the boxes, it freezes."
- CSR:** "Ok, that could be because of a software upgrade we are going through. But don't worry, I will show you how to enter your details into the system."
- Caller:** "Ah, that will be great."
- CSR:** "Do you have the computer in front of you? If you do, I can guide you now."
- Caller:** "No, I am not behind a computer at the moment."
- CSR:** "That's not a problem. I can send you the step-by step guidelines by email. If you give me your address I will send it right away."
- Caller:** "Oh, that's excellent. It's probably better to do it this way anyway. My email is...."

6.3.1 Educating the Customer through "Cross Selling" into more effective / efficient services and channels

- By the way, were you aware that you can text, email, use an online form?
- Should you find yourself in this situation again you can text, email, use an online form..

AT WORK - identify frequently asked questions and look at effective and efficient services and channels that you can "cross sell"

8 Assertive communication and the Factors of the Voice – 4P's

“A man is but the product of his thoughts what he thinks, he becomes.”

Mahatma Gandhi

When talking on the phone, it is not always about what you say, it also matters how you say it.

When going through emotional conversations or communicating with customers from different cultures or ethnic backgrounds the tone, power, pitch, pause, pace can be significantly more important than the words you say.

When communicating **assertively** you need to consider the 4P's. Assertive communication as opposed to passive or aggressive communication is usually the best way to handle communication, especially aggressive communication.

8.1 Tone of voice

This can be described as the light and shade of the voice, which also demonstrates and displays emotion. The light and shade demonstrates warmth or coldness, smoothness or roughness, harshness or gentleness, tension or relaxation.

Most of us can quickly identify someone's mood by the tone they use.

Example: *‘Oh yes, the bulk collection crew have arrived’* said in warm tone implies a successful visit. Alternatively, said with a cold tone it implies an unsuccessful visit.

Listen carefully to your caller's tone to identify their satisfaction or dissatisfaction.

Practice saying the following sentence in various tones.

“Sanah didn’t show up for work today.”

Try it with the following styles:

- Facts
- Secret
- Surprise
- Question
- Anger
- Disgust
- Suspicious

As you can see saying a simple sentence in different tones can significantly change its meaning. Amazingly enough it is rather easy to pick up the meaning by just listening to the tone. This is why it is so crucial to get the tone right.

To deliver a message with the right tone, you need to adopt the right attitude. Most experienced call centre staff know that you can literally hear someone smile on the other end of the line. Somehow we manage to pick it up even if we can’t see it. If you want the other person to hear your smile, all you need to do is to smile. Don’t assume that because the other person can’t see you, they can’t detect your emotional state through your voice and choice of words. Focus on your attitude to make it easy to adopt the right tone of voice and choice of words.

8.2 Power

- Too loud, too quite?
- Quiet is often associated with a lack of assertion, loud is associated with aggression,
- Power is the emphasis or stress put on a word or part of a word by lowering or raising the voice.

8.3 Pitch

- Not too high / too low
- Rich warm medium / low pitch with some variance for interest
- Don’t forget to smile - it lifts the tone

8.4 Pause

- If several pauses are used before or after words it could indicate that the caller is displaying an emotional state of anger.
- Pause to allow the customer to absorb information

8.5 Pace

If you regularly deal with certain content, you get to know it very well. Unfortunately, this means that you might go through it at an incredibly high speed that the other person may not understand.

Slower rate of speech also shows that the person is more educated and knowledgeable. Knowledge of more vocabulary allows a person to use more descriptive words to deliver what they mean and hence reduce the number of words in a sentence. This allows them to talk slower while still delivering the same message. This trend is so strong that people are almost conditioned to it which explains why people become quiet when someone starts to explain something slowly to others. Perhaps people naturally assume that the person is wise and has something valuable to say.

Unfortunately, most people seem to drift to fast talk when delivering information, especially information that they are most familiar with. This can easily overwhelm a person on the other side of the line as you move on with incredible speed.

Benefits of slower rate of speech are:

- **Understanding.** Increased understanding for the listener.
- **Emphasis.** Ability to stress different parts of the message or keywords to deliver your specific meaning as accurately as possible.
- **Drift.** Reduces the chances of drift for the listener by going slower through the content.
- **Pronunciation.** A clear pronunciation minimises misunderstanding through unfamiliarity with accents.
- **Pause.** Adding pause helps you to understand if a listener is following you and has understood your main message so far.

A simple technique to decrease your speed is to use large mouth movements. Most TV presenters and news readers use an exaggerated mouth movement when speaking. This helps them to reduce their rate of speech to an ideal level between 140 and 160 words per minute.

8.6 Out of Context

Consider these statements:

- “Know what I mean?”
- “You don’t understand, huh?”
- “In simple terms...”
- “In layman terms...”
- “To put it simply for you...”

Sometimes, you could say statements that can be taken out of context or interpreted the wrong way. It is important to avoid such statements and reduce the risk of misunderstandings.

The following are a number of examples that you should avoid saying or be very careful when you state them:

Instead, you should use statements such as the following which delivers the message in a much more professional and polite way:

- “That’s a lot of information. Would you like me to go over any specific parts again?”

Or blame yourself:

- “I’m not sure I did a good job explaining all that. Do you have any questions so far that you might like to ask before we move on?”
- “That’s a good question and I’m glad you asked that.”

Next, clarify issues with,

- “I would need your help on this. Please tell me exactly what steps you went through...”

8.7 Cultural Issues

7.7.1 Perception of Government

It is important to be aware that people, particularly from areas of the world where government oppression is common, may view government and you in particular, with a great deal more fear, anxiety and hostility than you might encounter from people with a different experiences with government.

It is important at least in some cases, to avoid coming across as bureaucratic or as one who holds considerable power.

Also behaviour that seems aimed at you, may be more related to the person’s experience elsewhere.

7.7.2 Communication / Tone of Voice

Different cultures have different tones of voice that are used in emotional circumstances. Some cultures are more expressive and the tone/language makes people from these cultures sound as if they are much angrier than they actually are.

*Try not to over react to the tone of voice, particularly if you are dealing with someone from a different country or culture. Also be aware that your own tone of voice may mean something different than you intend and that it may be misinterpreted. If you say something in what you think is a cool professional manner, and this seems to escalate hostility , it may be beneficial to explore with the person whether there is **misunderstanding**.*

7.7.3 Language

For people from other cultures, the words we use may be hard to understand, or worse, may be insulting. What you may see as

perfectly harmless may be culturally inappropriate. In the event that you do say something that seems to upset the other person, a good approach is to ask "Have I said something to upset you?" and then to apologize to the person if they explain. If they attack you for the use of a word, don't defend yourself, but simply thank them for informing you that it is inappropriate. Also, if you tend to use idiomatic expressions [slangs] then don't. Slang is almost always culturally specific and someone from another culture probably won't understand it or worse, may take offense.

8.8 Specific Tactics

7.8.1 Avoid Stereotyping

Do not stereotype people according to ethnic background. While they may share some things in common with other people with the same heritage, they may not. For example, Native people from different nations, or reserves can differ as much from one another as they do from non-native people.

7.8.2 Observe Carefully and be open to learning

Look for signs of escalation or lack of understanding. Try to catch the problems early. Be prepared to look at your own behaviour as part of the problem. Take the opportunity to learn about the cultural group.

7.8.3 Don't Yell

For people with English as a second language, don't yell to make yourself understood. They can hear just fine. You may want to slow down your speech slightly. A particularly good way to do this is to pause more often between sentences rather than between words.

7.8.4 Be Patient and understanding

Be extra patient and be aware that what you may take as common sense or common knowledge may not be so obvious to the other person. Remember that your customer is also frustrated at language and cultural differences that may be causing misunderstanding.

9 Scenarios

Objective:

By the end of this session you will be able to:

Handle challenging scenarios and common situations when interacting on the phone

In this session, you will explore a number of common scenarios that you may encounter while interacting with others on the phone. Scenarios usually provide a clear example of a situation and make it easy to see how guidelines must be implemented. They are also easier to remember when referring back to the guidelines. You will also go through a number of elaborate scenarios which are designed to refresh your memory on guidelines you have already gone through during the course and provide new angles on how to serve better on the phone.

Try this exercise to start with

- Split into groups
- The conversation is fully recorded on paper. So each group should write one statement on the paper and pass it to the other group. The other group, after thinking about their reply can write it and pass it back.
- One group should only respond assertively and the other group has a choice to respond anyway they like; aggressively, passively or assertively.

Subjection of conversation	A customer has tried to gain access to the library and has been informed that they will not be able to get any books from the library as long as the desk is closed and it is thought that the desk opens at 8.00am."
Conversation log	

Statement	A customer has tried to gain access to the building and has been told they are not allowed to enter the building without being escorted by security.
Conversation log	
Statement	A customer has just been told by a customer advisor that the they are not disorganised, the service is simply short of staff.
Conversation log	

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9.1 Frequently Encountered Scenarios

Secondly, let's go through a number of common situations that you might encounter when on the phone.

9.1.1 Scenario A

You are working at the main office. Your manager, Mr Smith, has left for a meeting. He said he would be back very soon. This was 2 hours ago. The phone rings. What would you do?

Solution:

You need to pick up the phone and explain the situation.

You: "Good afternoon, Fairfax Learning and Development Centre. How can I help you?"

Customer: "Can I speak to Mr. Smith. He told me to call back after lunch."

You: "My apologies, Mr. Smith is not available at the moment. He was indeed planning to be here, but an urgent matter required his attention. If you could leave your details with me, I will make sure that he will get back to you as soon as possible. I am very sorry about this."

9.1.2 Scenario B

A customer may tell you that your colleague has given him a different advice and so he wants to be treated differently. How do you respond?

Solution:

Your colleague might have really told the customer differently, but it is also possible that the customer wants to intimidate you into getting better results. In any case, don't fall for the bait. Focus the conversation on the issue at hand and suggest solving it your way. The customer is free to go and talk to the other colleague if he wants. Effectively you want to provide a choice for the customer.

9.1.3 Scenario C

You work in the customer service department of an upmarket furniture store which supplies very expensive products. Your manager Mrs. Bennett is expecting a call from Mr. Jones, a difficult customer who has been unhappy about your products. Mrs. Bennett has just left her desk for the bathrooms. The phone rings and you pick it up. It is Mr. Jones. How do you handle the call?

Solution:

When you know a person would be back to their desk very soon, it is better if you can hold the customer on the line as opposed to let them go. If you tell them to call back, it is likely that they won't call back in a few minutes, but give it plenty of time to make sure the person has returned. This has two major risks. The first is that the caller might not call again. This could be due to a number of reasons such as forgetting to make the call again (which can be a potential sale loss), or give it up altogether for something better that they might have found since their call.

The second risk is that when the caller calls back and the person they want to talk to is unavailable again, it may appear as if the caller is avoided. This is particularly important if the caller has a negative view of you already or wants to complain.

In this situation, the caller is not happy about the service and the manager already expects a call. You don't want to risk appearing as a company who wants to avoid the customer, so you must be careful. Hence, initially you should not ask the caller to call back. Instead, you should buy time. The best thing to do is explain the absence in longer than normal sentences and then ask for details of the person so you can get your manager to call him back. This allows you to spend a bit more time and hopefully your manager will be back. Alternatively, you have the details of the person and as soon as the manager is back, she can give him a call which should be fine with the caller as they have just called you.

Here is what you can say:

You: "White Furniture Customer Service Department, how can I help you?"

Customer: "This is Mr. Jones. I need to speak to Mrs. Bennett"

You: "Oh, Mrs. Bennett just left her desk, but she hasn't gone far. I think she could be back any minute. I think you just missed her. May I ask what this call is about? I can then forward this message to her when she comes back in a minutes and get her to call you? Does she have your contact number?"

Notice that you are asking several questions at once but this is only used to fill the gap and buy time. You can then go back to each question again and get answers one by one. Going through this can easily take up to a minute which could be all

you need. Of course, if Mrs. Bennett is still not back, you can safely hang up knowing that you have the caller's details.

9.1.4 Scenario D

A customer is not happy with your service and threatens to complain to the press. How do you handle this?

Solution

Do not take the bait. Just say,

“Yes, I understand, that's certainly your right if you like to do so. I can get you to talk to our manager if that helps, but it's entirely up to you.”

You want to imply that talking to the manager is more beneficial to the customer than talking to the press but at the same time you are acknowledging client's rights in taking alternative actions.

9.2 Angry Caller

When you are on the phone, it is always possible that you may come across someone who is angry about your products or services. It is also possible that they could be angry because of something else in their life, but they channel that anger towards you due to some slight irritation they might have experienced after using your products or services.

You should always handle these types of callers carefully for several critical reasons. You don't want to lose them and endanger the relationship, you don't want to bring down your own company and you don't want to get affected by the comments you hear from them.

Consider the following conversation:

CSR: "Widget Limited. How can I help you?"

Customer: "Hi, I want to report a serious mistake on your behalf. I ordered a network router from you and I explicitly asked for one that connects to Ethernet. You have shipped a version that I cannot use and now I have to go through all the hassle of sending it back. That's why I asked you explicitly before ordering, so this won't happen!"

CSR: "I see. Well I wasn't involved in this order so I am not sure what they have told you?"

Customer: "Well, I don't care. You didn't deliver what I wanted and are now wasting my time because I have to send it back and get another one."

CSR: "Listen, if you continue to shout like this, I can't do anything and I will hang up!"

Customer: "WHAT! I can't believe this. This is ridiculous. I am going to sue your entire corporation."

The customer got really angry in this case. What went wrong?

PRACTICE: ANGRY CALLER

Consider the above example. Identify what went wrong and how you can improve the experience. Use the principles discussed earlier and redo the conversation, this time with a friendly CSR who can handle the situation. The aim is to end up with a satisfied customer.

Analysis	
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<i>Customer</i>	
<i>CSR</i>	
<i>Customer</i>	
<i>CSR</i>	
<i>Customer</i>	

CSR	
-----	--

9.3 System Breakdown

When dealing with a caller, you might have a system breakdown or your computer might become too slow to allow you to deal with the call as desired. This usually happens without warning, so you must always be prepared to handle such situations with the correct technique. This case also applies to situations when you simply don't have the information or don't know how to deal with the request.

Consider the following scenario:

Customer: "Hi, I like to check the status of my pension investments."
CSR: "Sure, I need to get your account details."
Customer: [Provides info]
CSR: "The system is playing up. Just hold on." [Silence...]
Customer: "Ok" [Getting Impatient]
CSR: "My computer is very slow. It has been very slow all day."
Customer: "So how can I check the status? I need it today to make a decision."
CSR: "Well, this thing is not working. So I am not sure."
Customer: "Ah, this is getting nowhere. Forget it!" [Customer starts to think if it was a good idea to have invested in his pension with this company]

PRACTICE: SYSTEM BREAKDOWN

Considering, the above example. Identify what went wrong and how you can improve the experience. Use the principles discussed earlier and redo the conversation, this time with a friendly CSR who can handle the situation. The aim is to end up with a satisfied customer.

<i>Analysis</i>	
<i>Customer</i>	
<i>CSR</i>	
<i>Customer</i>	

CSR	
Customer	
CSR	

10 Scenario Answers

This section contains the answer for the scenarios given in Section 8.

10.1 Angry Customer

When dealing with an angry person, the key is to stay calm, be self-aware and try to put yourself in other person's position.

CSR: "Widget Limited. How can I help you?"

Customer: "Hi, I want to report a serious mistake on your behalf. I ordered a network router from you and I explicitly asked for one that connects to Ethernet. You have shipped a version that I cannot use and now I have to go through all the hassle of sending it back. That's why I asked you explicitly before ordering, so this won't happen!"

CSR: "I am sorry to hear that you had some problems. In order to help you, I need to know a bit more about your experience. Could you please tell me what product you have received from us?"

Customer: "Emm, it's a DSL-2000"

CSR: "Right, let me look up the details for you...this won't take long. This router is indeed an Ethernet router. To use it, you need to attach the extra adapter supplied in the box."

Customer: "Adapter. What adapter?"

CSR: "Did you not receive an adapter in the box? It looks like a black cube."

Customer: "Oh! Yes there was something like that in the box, I didn't realise what it was for."

CSR: "No problem. All you need to do is to connect that to the box and use as an Ethernet router. Is there anything else I can help you with?"

Customer: "No that's all right. Thanks for the help."

10.1.1 Analysis

How to improve as CSA:

- Assure the customer that you are trying to help
- Do not confront and defend. Instead defuse and switch topics.
- Use empathetic responses, much like a broken tape recorder, until customer is calmed down. Sometimes, the first apologies are not heard and all you have to do as CSA is to repeat them rather than expanding them.
- Get back to the main topic as quickly as you can.
- Do not take the bait. Let it go.
- Offer choices and empower the customer. The more choices the customer has, the more they feel in control. Even if they have limited choice, make an effort not to make it obvious.

10.2 System Breakdown

Customer: "Hi, I like to check the status of my pension investments."

CSR: "Thank you, I need to access your account details and this will take under a minute."

Customer: [Provides info]

CSR: "I apologise, it seems that the computer is slightly slow at the moment. This is very rare. If you just give me a few seconds to see if I can resolve it..."

Customer: "Ok" [Understanding]

CSR: "Sorry about this. I am not in a position to resolve your enquiry however, I can make sure someone will look into this so it won't happen again. I will transfer you now to my colleague who can provide you with the status of your report. My colleagues number is XXXXXX. I will pass on your details to my colleague so you don't have to explain it all over again. Is this OK?"

Customer: "Yeah, that's fine."

CSR: "Apologies again. I will transfer you now..."

Customer: "Thanks."

10.2.1 Analysis

When you don't have the information at hand, or if your system does not function as it should, you should artfully present the case in such a way to satisfy the following:

- Show that you can still solve the caller's issue or direct them to someone who can.
- Say you are sorry about the suboptimal performance and will ensure that it won't happen again in the future.
- Explain what happens next and how the customer is going to get the service they required.

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