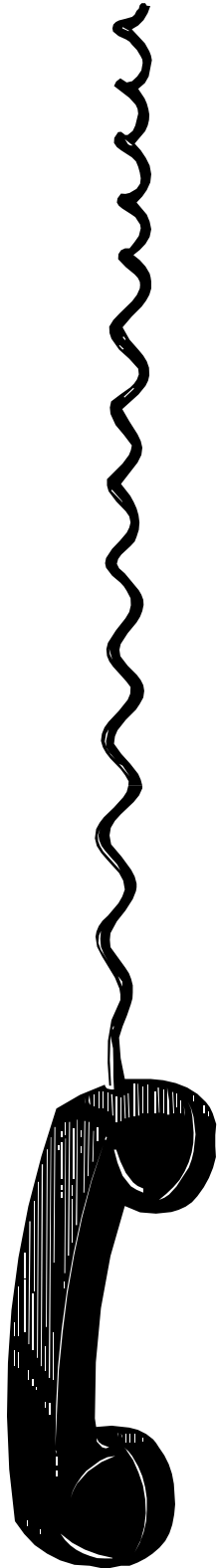


# Hold the Phone...It's a Customer Calling!



- 2 Providing exceptional Customer service
- 3 Customer service skills self-assessment
- 4 Listening to your voice
- 5 Practicing how you sound
- 6 Greeting the Customer
- 7 Practicing your pitch
- 9 That lost land of transfer and hold
- 10 When you're placing a call
- 11 Taking control of the call
- 12 Avoid fighting words!
- 13 Phrasing it positively and politely
- 14 Effectively handling a Customer contact
- 15 Your action plan
- 16 D.E.F.U.S.E. difficult people
- 17 Suggested reading
- 18 Rate of speaking

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# Customer service skills self-assessment

	That's me	Most of the time	Once a while	Doesn't happen
1. I'm aware of the impact my facial expressions and body language have on the sound of my voice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I'm aware of how my voice influences my Customer's perceptions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I match my rate of speaking to my Customer's to help build rapport.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I answer my telephone by the second ring.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I have paper and pencil or pen handy to take notes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I have a friendly-sounding greeting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. I use the Customer's name in conversation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. I give Customers a definite time by which I will call them back.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. I summarize what's been discussed—including any action items and completion dates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. I remember to thank the Customer for their call.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. When leaving a message, I communicate the response I would like from the Customer—including any action items or specific time frames.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. I know how to move along a chatty Customer—nicely!	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. I consciously phrase responses positively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. I avoid defending, explaining and justifying a situation to an upset Customer.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. I'm diligent about follow up—if I say I will, I do.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. I can laugh at myself.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

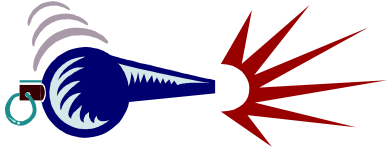
**My goals for today:**

.....

.....

.....

.....



## Listening to your voice

Tape yourself. Yes, that's how you sound!

Check your:

■ Tone

■ Volume

■ Pace

■ Pitch

■ **Breath control—diaphragm breathing**

- Sit quietly—with both feet on the floor if in a chair, perhaps legs crossed if on the floor
- Relax hands—hold nothing—resting them on knees or in lap
- Close your eyes
- Initially, for practice, place your palm flat on the front of your waist between the bottom of your ribcage and your abdomen.
- Breathe in through your nose with your mouth closed
- Feel your rib cage expand as your shoulders remain still (that's your diaphragm expanding)
- Exhale slooooooowly through your slightly open mouth—pulling your diaphragm toward your spine.
- Now try inhaling to a count of 3. Hold for 1 count. Exhale to a count of 3. Hold for 1 count.
- Breathe rhythmically

### Avoid the five vocal turnoffs

- 
- 
- 
- 
- 



### Vary your:

- Volume to emphasize contrast
- Pace to emphasize key points
- Pitch to create interest

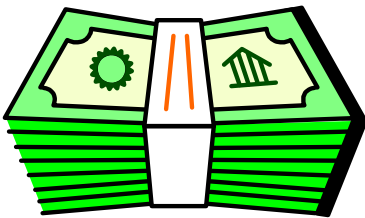
## Practicing how you sound

### ■ Articulation



Once upon a time there lived in the San Fernando Valley a boy by the name of Theophilus Thistle who was a successful thistle sifter. Next door to the Thistle Sifter, Theophilus, lived another boy, Peter Piper, the Pickled Pepper Picker. Unfortunately, Theophilus Thistle often thrust three thousand thistles through the thick of his thumb and Peter, while picking peppers, often got pickled himself. One afternoon, after picking a peck of pickled peppers and becoming quite pickled, Peter wandered down to the beach of Santa Monica (to do a little surfing) and there he met the girl of this story. Now for the sake of simplicity we shall call the girl “She.” She sold sea shells by the seashore and Peter the Pickled Pepper Picker often purchased the sea shells and they became quite good friends. As time passed, their friendship grew and they were finally married. Peter Piper picked Theophilus Thistle to be his best man. Theophilus Thistle, who was really a very successful Thistle Sifter, thrust three thousand thistles through the thick of his thumb. But Peter, who wasn’t pickled, and She, who wasn’t selling sea shells, got married anyway. And they lived happily ever after.

### ■ Inflection



1. **I** didn’t say he stole the money.
2. I **didn’t** say he stole the money.
3. I didn’t **say** he stole the money.
4. I didn’t say **he** stole the money.
5. I didn’t say he **stole** the money.
6. I didn’t say he stole **the** money.
7. I didn’t say he stole the **money**.

### ■ Remember to pause

*The right word may be effective;  
but no word was ever as effective  
as a rightly timed pause.*

—Mark Twain

If you’ve just explained something or offered an option,  
the Customer is likely \_\_\_\_\_ .



# Greeting the Customer

- Customers want the phone to be answered by \_\_\_\_ to \_\_\_\_ rings.
- 90% hang up after \_\_\_\_\_ rings.
- Check how you sound...have a warm **Greeting:**
  - \* "Good morning/afternoon, Costco. This is \_\_\_\_\_.
  - How may I **help** you?"

## Call Path .....

### 1. Greeting

.....  
.....

### 2. Assurance of Help

.....  
.....

The **Great Middle**...when  
you do all the things you  
do so well!

### 3. Offer of

#### Additional Help

.....  
.....

### 4. Recommitment Line

.....  
.....



# WII-FM

.....

- Get the caller's name. **Write it down.** Use it in conversation.
- Write down their opening statement

.....  
.....

### ■ Give your **Assurance of Help**

\* "I'll be happy to **help** you with that."

.....

### ■ Wrap up conversation with an **Offer of Additional Help**

\* "And is there anything else I can **help** you with \_\_\_\_\_?"

### ■ Close with **Recommitment Line**

\* "Thank you for doing business with Costco, \_\_\_\_\_!"

OR

\* "Thank you for your business, \_\_\_\_\_!"

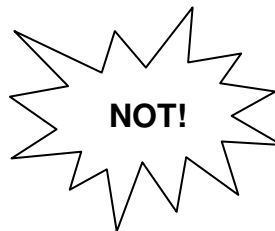
OR

\* "Thank you for your order, \_\_\_\_\_!"

# Practicing your pitch



## 1. Greeting

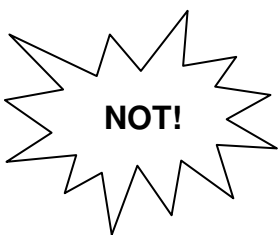


How may I help you?

How may I help you?

## 2. Promise of help

I'll be happy to help you with that.



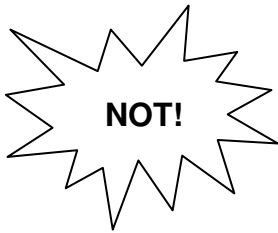
I'll be happy to help you with that.

---

### 3. Offer of Additional Help

---

And is there anything else I can help you with?



And is there anything else I can help you with?

### 4. Thank you—or recommitment line

---

Thank you for your business (order) \_\_\_\_\_!

# That lost land of *transfer* and *hold*

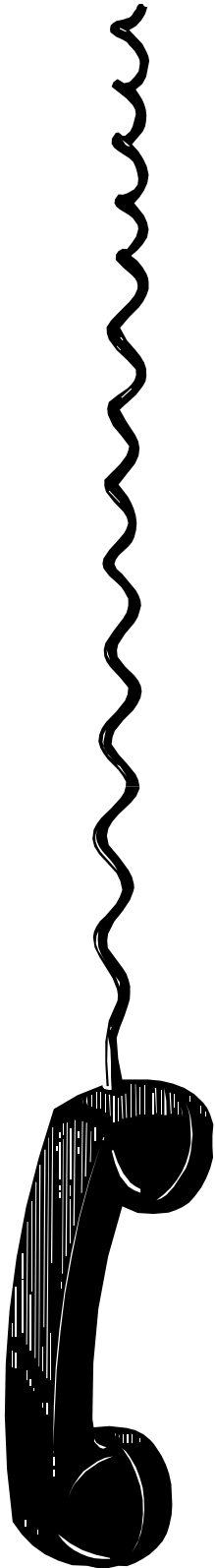


When you need to connect the caller with someone else, stress the benefits to them. **Wii-fm!**

.....  
.....  
.....  
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.....

- Ask permission to put someone on hold
  - And wait for their answer!
  
- Get back to the Customer after no more than \_\_\_\_\_ seconds
  - Check back with them before the time is up
  - When you return, say *“Thank you for holding. How may I help you?”*
  
- Give the **option** of a **call back** rather than holding
  
- Avoid the word *“transfer”*
  - Say instead, *“Let me connect you with...”*  
*“I’ll have you talk to...”*
  - Give them the other person’s \_\_\_\_\_ and \_\_\_\_\_ in case they’re disconnected
  - Check to see if the person is there. Get Customer’s **permission** before putting them through to **voice mail**
  - Pass along Customer information to the next person
  
- Give them a **definite time** when you will call them back
  - Call them back within that time frame—even if you do not **have the answer!**
  
- Focus your complete attention on the caller
  - **Let them know you’re taking notes** or entering *their* information into the computer. The **Wii-fm** for you? They’ll \_\_\_\_\_ !
  
- **Close with summation** of what’s been discussed and any action items and completion dates—and gain their agreement
  
- **Thank them their business.** Use **their name** in closing.

# When you're placing a call



## If you've reached the person directly

- Always **identify yourself**—using last name, too, if there might be confusion

- Mention a brief memory jogger **Returning a call:**

*"Hello \_\_\_\_\_? This is \_\_\_\_\_ from Group Health Cooperative returning your call. How may I help you?"*

### Initiating a call:

*"This is \_\_\_\_\_ from Group Health Cooperative. I'm calling about \_\_\_\_\_."*

- Be prepared so you can be brief and to the point
- **Thank them** for their time

## If you're leaving a message on voice mail

- Speak up
- Speak relatively slowly
- Enunciate more carefully
- Spell your name if it's at all unusual
- Leave your telephone number...even if you're *sure* they know it!
- **Slow down when you say your number**
- Be sure to leave all important information
- **Communicate the response** you would like from them—including any **action items or specific time frames**. Give them a **WII-fm!**
- **Repeat** your name and **phone number** at the end of a lengthy message

## Some final telephone tips

- Be prepared
- Hold the phone so your voice is not muffled
- Remember, you can hear a smile!
- Hang up last

# Taking control of the call

You can use any phrase in the column on the left with any phrase in the column on the right.



When you need to change the subject and lead the caller to the business at hand, start with a ► **positive comment** about what was said and follow it with a ► **lead-in phrase, question or statement.**

► **Positive comment**

► **Lead-in**

That's definitely important, (name)

Now what do you think about \_\_\_\_\_?

That's super, (name)

Before I forget \_\_\_\_\_.

I know what you're saying, (name)

How would you feel about \_\_\_\_\_?

That's interesting, (name)

Along that same line \_\_\_\_\_.

Hey, that's great, (name)

By the way, were you aware \_\_\_\_\_?

I agree, (name)

It's interesting to note \_\_\_\_\_.

I didn't know that, (name)

I think you'll also find this interesting.

Me, too.

Come to think of it, you may want to know about \_\_\_\_\_

I see what you mean, (name)

Might I mention to you that \_\_\_\_\_?

It sounds like...

That reminds me...

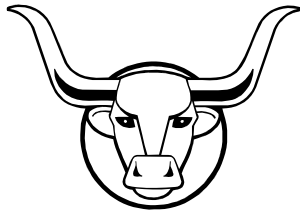
Let me...

.....  
 .....



Pick the phrases that sound like something you would say or use these as inspiration and come up with some of your own.

# Avoid fighting words!



**Certain words** have the same effect on people as waving a red flag in front of a bull! Avoid these *red flag* words & phrases. Replace them with neutral ones. The **Wii-fm** for you? Our language also affects our self-esteem. You'll feel better about yourself and others will be more likely to respond positively!

**Attitude suggested:**

.....

.....

.....

.....

.....

.....

.....

**Red flag phrases**

**Calming phrases**

You should have...

I can understand why you

You'll have to...

May I ask you to...

Why didn't you?

I can see why

I have to

I will, Let me, I'd be happy to

I'll try

I'll take care of this  
Let me see what I can do

I can't

Let me find out for you

That's not my responsibility

I'll find out who...

It's not our policy

Here's what we can do  
Here's what you can do

But

\_\_\_\_\_

No Problem

\_\_\_\_\_

I'm glad I could help...

I'm happy to...

My pleasure...



**L-ing:**

- ⊙ defending
- ⊙ explaining
- ⊙ justifying

It sounds like you're making \_\_\_\_\_.

# Phrasing it positively and politely

**Practice:** Rewrite the following statements

## Our goals are to

- Own the message
- Tell what you *can* do, not what you *can't* do
- Find the piece of the message you can do something about
- Say "No" and "I don't know" positively.



## WIIFM

Some hints for practices:

- Use their **name**
- Stress the **benefits** to the receiver...use the condition-benefit formula

"We will do. ....

.....

if you will do. ...."

- Avoid **Red Flag** words
- Use the **magic words!**  
.....  
.....

- "We can't get that scheduled until Thursday."

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- "I don't handle billings."

---



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- "I can't do that; it's not our policy."

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- "We don't have that available."

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- "I'll have to check on our inventory."

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- "I can't imagine why they transferred your call to me. I'll have to transfer you to accounting."

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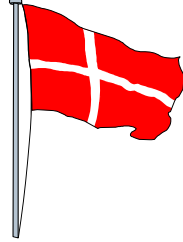


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# Your action plan



Two Red Flag phrases I frequently use and the phrases I will use to replace them

.....  
.....  
.....  
.....

*Not everything that is faced can be changed; but nothing can be changed that is not faced.*  
—Franklin D. Roosevelt



Something I do well and will continue to do as I interact with Customers on the telephone

.....  
.....  
.....

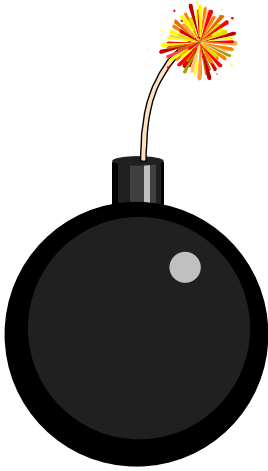
*You cannot teach a person anything. You can only help them discover it in themselves.*  
—Galileo



Something I will focus on in my next telephone interaction with a Customer

.....  
.....  
.....

# D. E. F. U. S. E. difficult people



## If you're dealing with a really angry person:

- Breathe!
- Let them vent
- Listen-until they start to repeat themselves
- Interrupt by saying their \_\_\_\_\_
- Quickly backtrack what you've heard
- Go to **D.E.F.U.S.E.**

## **D**o assume accountability

- Project positive intent...demonstrate your willingness to **help**
- Take **ownership** of the situation and **apologize**, if appropriate

## **E**mpathize with their emotions

- Make an **empathetic** statement:  
*"I'd be upset too!"*    *"I can appreciate why you're angry."*
- Consciously use **Pacing**

## **F**ocus on the issue, not the person

- Remember to avoid taking this personally...it's **not about you!**

## **U**se good listening skills

- Make attentive sounds—or words—on the phone:  
*"I see."*    *"Okay."*    *"Uh-huh."*
- Let them know you heard by using **Backtracking**

## **S**eek an agreed-upon definition of the problem

- Encourage the other person to **brainstorm** a solution
- Be **specific** and constructive—ask **Clarifying** questions:  
*"What would you like to see us do?"*  
*"What would an acceptable situation look like?"*  
*"How can we make this work for you?"*

## **E**xplore possible options

- Go for a **win-win**: offer **options**: *"We can do this..."*  
*"One thing we might try is..."*  
*"We have several options...which would you prefer?"*
- End with a **summary** of what has been discussed—including any action items and completion dates--and gain their agreement

## Suggested Reading

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*Talking from 9 to 5*. 1994.
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## Rate of Speaking



- ▶ The following passage is 140 words in length. The average speaking rate in America is 125 – 150 wpm. Time yourself and see how you do:

There is no set rule for the rate of speaking of individuals. Some people can speak at a rate of one hundred ninety words per minute and be clearly understood, while others must speak as slowly as ninety words per minute to achieve the same understanding. Most experts feel, however, that there is more to be gained by speaking slowly. They have decided that a rate of about one hundred forty words per minute is a safe rate. The main disadvantage of speaking too fast is that you cannot be understood easily. Speaking too fast has other disadvantages. Your audience may get the impression that they are being pressured into something. In addition they may get the impression that you are very rushed and concerned with time. To be really understood, we recommend that you speak slowly.

- ▶ And, remember to vary your rate of speaking for emphasis. Part of what causes a monotone voice is speaking at the same rate all the time.