

CUSTOMER SERVICE

The Telephone Connection

STUDY GUIDE

PREVIEW

TABLE OF CONTENTS

PREFACE	3
INTRODUCTION	4
“CUSTOMER”	6
• <i>The Greeting</i>	8
• <i>Listening Skills</i>	11
• <i>Telephone Courtesy</i>	16
“SERVICE”	20
• <i>Product and System Knowledge</i>	22
• <i>Complaints</i>	26
• <i>Problem Solving</i>	31
CONCLUSION	34
QUIZ	36
CERTIFICATE OF COMPLETION	39

PREFACE

This study guide is intended for use with the video training program, *Customer Service: The Telephone Connection*. It is designed to review the topics covered in the video and reinforce your understanding of telephone customer service techniques.

Discussion questions are presented in the chapters that cover specific learning content: the greeting, listening skills, telephone courtesy, product and system knowledge, complaints, and problem solving. These questions can be answered while reading this guide on your own or they can be used as the basis for role-playing exercises if you are participating in group training.

There is a quiz at the end of this study guide to test your knowledge of various points raised in the video. You will also find a certificate of completion that can be signed by your instructor to verify that you received this training.



INTRODUCTION

Why study telephone customer service? After all, it seems pretty straightforward. Just pick up the phone and talk, right? But actually there's a lot more to it.

When you answer the phone, you are the most important person in your company at that particular moment. Your voice and the relationship you establish with the caller carries over to every other employee, all the way to the top of the organization. This applies especially for new callers, since you will be the one to make the crucial "first impression" on them.

That first impression and subsequent relationship building couldn't be more important because humans enjoy social interaction. We tend to personalize all of our relationships. We even humanize our connections with animals and sometimes with inanimate things like boats and cars. We judge organizations and develop emotional responses to them based on the interactions we have with their representatives. How we feel about a customer service rep often transfers into a feeling about an entire organization.

It's a big responsibility so you have to make a commitment with every call. And this commitment starts with developing the skills you need to provide telephone customer service that is positive and professional, and connects with customers on a human level that makes them feel good about your organization and how it responds to their needs.

PREVIEW



“CUSTOMER”

Customers matter. Whether they are called shoppers, clients, patrons, guests, patients or members of the public—your organization could not exist without them. And you wouldn't be here now, learning about how best to serve them.

Think about the good experiences you've had when you have been a customer, yourself. And maybe a few experiences that weren't so good. Isn't it much more pleasant to feel valued as a customer and get the help you need from the customer service representative who is there to assist you?

We're all busy and have a lot going on. Whether we are shopping, running errands or taking care of business, what we want is helpful, fast service that is considerate and respectful and meets our needs.

Without exaggerating too much, what we're trying to say is that good customer service helps make the world go around. Or at least makes life a lot easier for all of us.

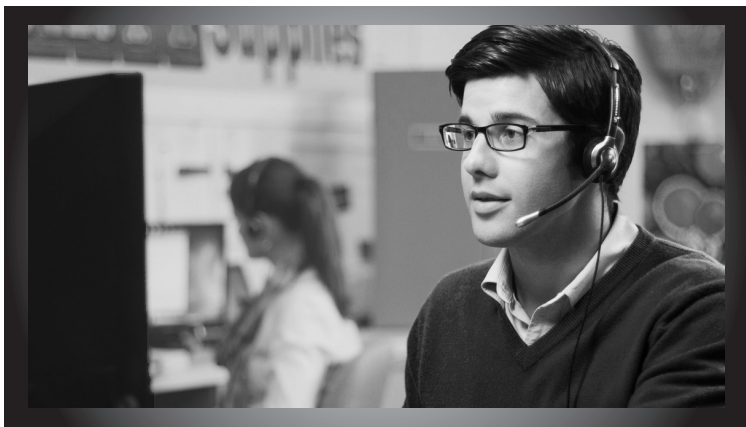
Telephone customer service is a big part of this.

The telephone continues to fill an important need, in spite of the fact that more and more customer service is taking place online these days. Certain situations are handled more efficiently when discussed directly over the phone. Other situations lend themselves to the personal touch possible with voice communications. And many customers still prefer speaking to a live human being instead of using a computer, especially when dealing with delicate subjects or complex issues.

But working with customers over the telephone presents special challenges. You can't see your customers and read their body language. Usually you don't know what they look like or the setting they are calling from. Your only cues as to what they need and how they want you to deal with them come from their tone of voice and the words they use.

The reverse is also true. They can't see you and probably don't have any idea who you are. The only way you can communicate your ability to provide customer service and your willingness to help them is by your tone of voice and the words you choose.

And this applies even when your job doesn't involve dealing with outsiders. Your coworkers could be considered your "customers," too. Sometimes they need your help on the phone just like outside customers do. That's another reason why developing your customer service skills is so important. And also why you're likely to be using them, every single day.



THE GREETING

We all feel good when people demonstrate they are happy to hear from us. That's why it all starts with your greeting. No matter who is on the other end of the call, how you greet them really matters. It can set the tone for your entire conversation.

Be ready for the call before you pick it up. If you use a customer service system of any kind, be sure it is up and running. Have a pencil and notepad handy so you can write down the customer's name and company so they will not have to repeat it.

Try to answer before the third ring. This shows respect for your customer's time and demonstrates your eagerness to be of help.

Keep your greeting short and clear. State your company's name, your own name and perhaps something extra. Your something extra might be "Good Morning" or "Good Afternoon" or "How may I help you?" or "How may I direct your call?" If a call has been transferred to you, repeating your company name is unnecessary but identifying your department as well as yourself can be helpful.

It's OK to use a standard phrase, but always use a pleasant and upbeat voice. Voice tones are critical. Unless your voice is cheerful and energetic, even a careful choice of words will fail to sound warm and

welcoming. In fact, the tone of your voice will usually override the actual words you use.

So start off with the right attitude and maintain it throughout the call. Enthusiasm is contagious—be positive and enthusiastic about the products or services you are providing. Speak clearly and offer to help.

Attitude and clarity also apply when using voicemail systems and leaving messages. If a customer tries to reach you, but you are away or on another call, it's important that your voicemail greeting also be welcoming and professional. And if your responsibilities include making outgoing calls to customers or placing follow-up calls about previous customer service issues, any messages you leave should be the same.

That's why it's important to give some thought as to what you might say before you actually place a customer call in case you reach the customer's voicemail instead. Otherwise, you could get caught by surprise and end up leaving a message that is unprofessional at best—or downright confusing at worst. You often can't redo it once you leave a message on someone else's phone. So plan ahead.

Consider writing down what you need to say, or at least have any necessary documents handy so you can read off invoice numbers, amounts, or any other important information. Speak slowly and clearly. Leave the date and time of your call in case their systems don't capture this. Briefly state the specific reasons for your call. Then leave your preferred method for the customer to reply, usually a phone number but perhaps a text or email address. Spell out the email address if there could be any doubt. And then end your message with thanks.

When you create your own outgoing voicemail greeting, similar rules apply. Make the greeting personal and informative. Speak slowly and clearly. Tell the caller when they should expect a return call from you. If you will be away for longer than a short period of time, let them know whether you will be able to check your messages while you are out. If you won't be checking messages, provide callers with options

such as another person they can contact in your absence. Give them brief instructions how to reach that person. If they need to hit special keys, let them know how your voicemail system works. (A common example would be “Touch zero to reach an operator.”) Finally, be sure to end with thanks.

Your greeting, whether made in person over the phone or left on a voicemail system, introduces you and sets the stage for the customer’s experience with you and your organization. First impressions ARE important—make the best of them.

Discussion question: The Greeting

Try this role-playing exercise. Repeat the sentence “Customer service is a wonderful opportunity” eight times, attempting to demonstrate each of the following eight attitudes. What changes do you notice both in the way you sound and in the way you feel as you vary your voice tones?

Warmth _____ **Coldness** _____

Excitement _____ **Depression** _____

Cheerfulness _____ **Seriousness** _____

Interest _____ **Boredom** _____