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Tools, tips and tactics for the frontline customer service professional

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The Takeaway

Stop sitting and start moving

Yet another study shows the negative impacts of sitting for extended periods of time. The evidence is clear, sitting is bad for your heart, joints, muscles, metabolism, and even mental health. As a rep, you're likely sitting for eight or nine hours a day while working. So try these quick tips to add a little movement to your day:

Make it a habit. Set a timer to remind yourself to stand up and stretch every 30 minutes.

Exercise in place. Instead of standing and stretching, try 10 to 15 repetitions of pointing and flexing each foot, seated calf raises, and marching in place.

Take the stairs. Going to see a coworker on another floor? Take the stairs. It's one of the easiest ways to add more movement to the workday. Eating your lunch on a different floor can also help add movement — and fresh perspective. **ITCC**

Help customers stay focused and on track

Even calls with chatty, rambling, and disorganized customers can be handled quickly and efficiently — if you know how.

With each call, customer service reps must perform a delicate balancing act. On the one hand, you never want to rush a customer. Each customer deserves to know they are heard and valued. On the other hand you must handle calls quickly and efficiently in order to get to the next customer.

Communication skills, product knowledge, and technical skills are all essential to handling calls efficiently. But beyond the fundamentals, service experts suggest the following practical techniques to resolve calls more quickly.

Technique 1. Use sign-posts to prepare customers. One of the most effective ways to manage call length is through sign-posting. This technique involves alerting customers to what comes next.

One way to use sign-posting is to simply outline the flow of the call. This helps the customer to feel more in control and keeps them from veering off in the wrong direction. For example:

"I'd like to start by confirming your account details, then we can discuss the current situation and the best resolution. How does that sound?"

A second use of sign-posting is to alert customers to information that you will need in the course of the call so that they can begin gathering materials. For example:

"In a few moments I will need your credit or debit card details to process your order." Or, "After I enter your contact information, I will ask you for the account number on your last statement."

Each organization is different, but virtually all reps can find signposts that will help customers feel in control and move calls forward.

Technique 2. Bring rambling customers back on track. One of the most frequent causes of lengthy calls is the customer who rambles or goes off-topic. Often customers don't know what information is relevant so they want to tell you everything and let you sort it out. While it's important that customers feel heard, it's also important to gently guide the conversation back to the main issue. This can be done in three steps:

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1. Acknowledge the customer's concerns.
2. Narrow the focus by summarizing the key points that the customer has made.
3. Redirect the conversation to the primary issue with a narrowly focused question.

The rep's statement might sound like this: "Thank you for providing that information, the situation sounds very complicated. To summarize, the main issue is that you are no longer receiving your subscription. What is the last issue that you received?"

Technique 3. End calls with talkative customers. Some customers may continue the conversation even after their issue has been resolved. While taking the time to build rapport is important, it's equally important to politely end those calls and move on to the next customer. This can be done with the following three actions:

1. Give the customer a sense of closure by stating how the problem or issue was resolved and the next steps to be taken.
2. Use closing phrases such as, "to summarize," or "to wrap up," or "before we finish."
3. Offer additional resources if appropriate.

Your closing might sound like this:

"I'm glad we were able to

Service Note

Post a sign to direct customers

Customers typically come to the call with everything needed to resolve a problem. But when they don't, valuable time can be lost while they search for important information. Sign-posting is a simple but effective technique to help customers get organized. This month's main article explains how to use sign-posts. Three additional examples are shown below:

- "In a moment, I'll give you your case number, you may want to write this down for future reference."
- "I need to ask you to hold for a few moments. When I return I'll need your account number and product code."
- "I'll be ready for your credit card number after I take your shipping details."

resolve this issue today. To summarize, we updated your contact details and restarted your subscription. Is there anything else that I can help with? For any questions in the future, you may call us or visit our website and click the green 'help' button."

Technique 4. Know when to escalate or transfer. Frontline reps want to help — it's what you do. Unfortunately the desire to help can sometimes get in the way of handling calls quickly. You must understand what you can handle, what your limitations are, and if you can successfully resolve an issue for the customer. If you are not able to meet the customer's needs, don't hesitate to transfer

the call to someone who has the necessary skills and authority.

Technique 5. Use standard abbreviations. Once a customer call is completed, the after-call work begins. This work includes things like updating your systems, setting up follow-up tasks, and communicating with other departments. Often after-call work takes longer than the actual call. One way to manage the length of this work, and to minimize confusion among coworkers, is taking clear and complete notes and using agreed on abbreviations. These might be specific to your work or standard abbreviations such as PT for patient, Info. for information, and DOB for date of birth. **TCC**

Pop Quiz

Test your knowledge of customer service with this month's pop quiz. Answer each statement true or false. Turn to page 4 to check your answers.

		True	False
1.	Call quality is more important than call length.		
2.	Sign-posts can be used in every service setting.		
3.	Customers recognize "closing phrases."		

A monthly roundup . . .

What makes service memorable?

The opportunity to create special experiences for customers doesn't happen every day — but when it does, service leaders create memorable experiences that are personal and unexpected.

A new report from McKinsey & Company looks at how hotels and other service organizations can provide personalized and memorable customer experiences like these:

- When a guest lost her wedding ring while swimming, the general manager hired a metal detector service to find it.
- An executive staying at a hotel was scheduled to close an important deal the next morning, but he'd forgotten to pack his dress shoes. The concierge happened to wear the same size and offered his shoes to the guest. The guest closed the deal.
- A little girl with an illness was staying with her family at a desert ranch hotel. The girl dreamed of riding a unicorn, so the hotel put one of its horses in a unicorn costume (complete with horn) and made the girl's dreams come true. The family now comes back every year.

Ask the Experts

Cross-selling and upselling in customer service

"We've recently been asked to add some selling to our customer service responsibilities. Basically offering a premium version of something that the customer has or asks about. I don't see myself as a salesperson and I'm having trouble getting past the 'ick' factor. Is selling really part of customer service?"

The "ick" factor

"There are many different approaches to sales — and some are definitely pushy and I'd be uncomfortable with them," says remote rep Naomi Jackson. "But as a customer service rep, you're going to focus on identifying customer needs, laying out options, and creating a call environment that gives the customer space to make their own decisions. With this approach, you'll find that selling can be integrated into your customer service work without damaging your relationship with your customers or giving you what you call the 'ick.'"

Listen for opportunities

If you listen carefully, you'll start to recognize many opportunities for selling every day. "Often when a customer expresses dissatisfaction about some aspect of a product or service, they are giving you an opening to offer an additional or upgraded product that will better meet their needs," explains Laura Peyton a long-time rep who works closely with her company's sales team.

"Here's an example from my own shopping experience," says Peyton. "I was ordering pet supplies (from a company that rhymes with goeey) and mentioned that the flea and tick treatment worked really well but that it didn't last long. The rep

mentioned another brand that's a few dollars more but also longer-lasting. I decided to try it. Because she was solving a problem I saw her as helpful and knowledgeable not pushy.

"Also, it's often helpful to give the customer alternatives. After offering what you feel is the best solution (long-lasting spray), present additional options (maybe the flea and tick chews). This gives customers the satisfaction of knowing that they made the decision on their own, rather than feeling pressured into buying something," she says.

Use a customer-first approach

The most important thing to remember is that you must maintain a customer-oriented approach rather than a sales-oriented approach. Nanda Monsey, a help desk technician, explains: "What I mean by that is that your first responsibility is not to sell something, your first responsibility is taking care of the customer's immediate needs. Never attempt to cross-sell or upsell until you've resolved the customer's initial problem or issue."



Ask the experts. Have a question or comment you'd like to share? Just email info@CustomerServiceGroup.com. Please use the subject "Ask the Experts."

Refreshers and quick tips . . .

Good news

The SS United States, a relic of ocean liner history, will be sunk to create the world's largest [artificial reef](#) off the coast of Florida.

A Utah girl drew a picture of her dream playground, and her [town built it](#).

Avoid negative language

When delivering bad news to a customer every word counts. The more positive you can be in presenting the situation and the alternatives, the less likely the customer will be to focus on the negative aspects of the situation. Phrases to avoid include:

- Damage control.
- This is the best of a bad situation.
- This is the best that we can do.
- It's the lesser of two evils.

A two-part technique to head off problems

Instead of resolving problems, try resolving and preventing problems. Service quality experts Karen Leland and Keith Bailey suggest doing this with a simple two part technique. In the first part, you explain what you can do. In the second part you explain what the customer can do. Here's how it works:

“My favorite road sign is ‘Falling Rocks.’ What exactly am I supposed to do with that information?”

— Jimmy Carr, Comedian

• What I will do is... This lets customers know that you want to help them. Then add the specific actions you'll take to get their issue resolved. It may not be exactly the resolution the customer wants, but it will create a compromise situation and lessen the customer's frustration.

• What you can do is... This lets customers know that they have some control over the outcome, and that the two of you are partners in problem resolution. This is where you suggest what the customer can do in the future to avoid similar problems.

It's all in the voice

Your voice could be giving you an undeserved black eye, according to service consultant Kimberly King. If you're not aware of and careful about how you use your voice you may be sending unwanted negative messages to customers. Are you:

- Bored because you are talking too slowly.
- Agitated because you are talking too loudly.
- Lacking confidence because you are talking too softly.
- Rushed because you are talking too quickly.

To create a positive experience for your customers, King

says, “Remember to sit up straight, project your voice, fluctuate your tone, and vary your pace to add emphasis to certain words that you want customers to remember.” [TCC](#)

Pop quiz answers

1. **True.** While the quality of a call is more important than the length of a call, call handle time still has an impact on a service operations productivity and ability to serve all customers well.
2. **True.** Alerting the customer to next steps and information needed can significantly reduce the length of a call. And you won't be left hanging while the customer looks for their credit card or reading glasses.
3. **True.** Common phrases such as “to summarize,” or “to wrap up,” or “before we finish,” all signal that a call is coming to an end.

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SkillSharpeners

The manager's companion to *Customer Communicator*

December 2024

December's highlights

In this month's issue of *Customer Communicator* your team will find:

1. Practical techniques to manage call length.
2. Fun examples of memorable service from leading hotels.
3. Tips on moving to service-plus-sales, pop quiz, good news, and ideas for adding a little movement to the work day.

Manager's notes

Every few months a new study comes out linking prolonged sitting with a whole host of medical issues. The latest even links regular, lengthy periods of sitting with mental health issues.

This month, the "Takeaway" column on page one suggests ways that reps can add a little movement to their day. But before you are confronted with a service team doing calisthenics in the aisles, take some time to discuss this important topic, practice these or other exercises, and clarify when and where stretching is not just approved, but encouraged.

Also on page one is the article, "Help customers stay focused and on track." The article includes many useful techniques such as sign-posting calls, closing calls with talkative customers, and re-focusing rambling customers. The final two suggestions regarding escalations and the use of abbreviations are good topics for team meetings and activities.

First, it's critical that everyone on the team understand when and how to escalate calls. This will, of course, vary by organization and is important to review regularly.

Second is standard abbreviations. Abbreviations can speed the time needed to write call notes, but they can also lead to confusion if everyone is using their own unique abbreviations. Does PT mean part-time, physical therapy, patient, or pacific time? If you don't have a list of standard abbreviations, consider asking a small group of reps to take on this project.