

***CUSTOMER SERVICE OVER THE PHONE***



**INSTRUCTOR GUIDE**  
**4-HOUR COURSE**

***CUSTOMER SERVICE OVER THE PHONE***

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# Instructional design and learning philosophy

We are committed to providing the best core skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

## Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SME)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- Learning objectives — effective tools for managing, monitoring and evaluating training
- Meaningfulness — connects the topic to the students' past, present and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrate to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

## Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

# Course timing

## Module One: Customer Service Over the Phone

Type of Activity	Segment	Time
	Developing a service-centered attitude	10
	Build rapport	20
	Components of customer service	5
	Identify your role	10
	Role practice	10
	Use proper etiquette	5
	Listening skillfully	10
	Role plays	60



Reading



Written Exercise








Facilitate



Group Activity

# Course timing

## Module Two: Handling Angry Customers

Type of Activity	Segment	Time
	Handling angry customers	15
	Case study	15
	Saying "no" in a positive way	10
	Overcoming mistakes	10
	Strategies for staying motivated	5



Reading



Written Exercise








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Group Activity

# Course timing

## Module Three: Coaching for Accountability and Results

Type of Activity	Segment	Time
	Nine keys to effective leadership	5
	Service ace rubric	15
	How to give feedback that improves performance	10
	Positive reinforcement	15
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Reading



Written Exercise



Facilitate



Group Activity

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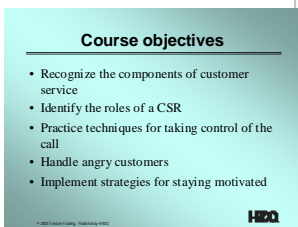
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## Course objectives

Successful completion of this course will increase your knowledge and ability to:

- Recognize the components of customer service
- Identify the roles of a customer service representative
- Practice techniques for taking control of the call
- Learn to handle angry customers
- Implement strategies for staying motivated



## ModuleOne



# ***CUSTOMER SERVICE OVER THE PHONE***

## Learning objectives

Successful completion of this chapter will increase your knowledge and ability to:

Build rapport with customers

Replace negative phrases with positive statements

Identify the components of customer service over the telephone

Define the various roles of a customer service representative

Use active listening skills

# Developing a service-centered attitude

Think of a time when you experienced great customer service over the phone. Describe your experience including the characteristics and behaviors of the customer service rep and your reactions.

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Now, think of a time when you experienced poor customer service over the phone. Describe your experience and contrast it with the experience above.

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Have participants complete the activity in the workbook. Debrief by sharing responses. Points to discuss include: felt cared about, rep was responsive and knowledgeable, was pleasant. In poor situation: didn't feel listened to, didn't get problem solved, felt frustrated, had to repeat issue. Have participants answer the question: "What does the word *Star* mean to you?" Share responses and use an opening to introduce the Service Star theme. Emphasize: From first call to last call, every customer must be treated as an individual who is important. Your words and tone should convey a "we" attitude (One Sprint) rather than an "us versus them" attitude. Preview the aspects of becoming a service star that will be discussed: developing rapport, accepting responsibility and ownership, and handling angry customers.

**Traits of a service star**

- Developing rapport
- Accepting responsibility and ownership
- Handling angry customers effectively



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**Statistics**

- Satisfied customers tell four to five others
- Dissatisfied customers tell nine to 12 others
- Only 4% of dissatisfied customers complain. If you respond within 24 to 48 hours, 82–95% of them will do business with you again.

**Build rapport**

- Use good phone etiquette
- Use customer's name and make customer feel unique
- Match customer's style
- Use a constant rhythm in your voice
- Use positive phrasing

Review the elements of building rapport. Polished voice tone is sincere and enthusiastic; not apathetic or condescending. Match customer's vocabulary by avoiding jargon. Emphasize the importance of using positive phrasing by having participants complete the practice. Suggested answers (or similar):

1. "Let me find out and call you back."
2. "Sam is an expert in that area and can help you with that."
3. "Let me speak with Suzanna and call you back."
4. "Your situation will be handled on the next computer update."
5. "I understand why you waited to call."
6. "I found the cause of the problem so now I can correct it."
7. "Here's how we handle that situation."
8. "Here's what we can do."
9. "Let me share some information with you."

## Build rapport

- Use good phone etiquette
- Polite words
- Polished voice tone
- Use customer's name and make customer feel unique
- Match customer's style
- Pace
- Vocabulary
- Use a constant rhythm in your voice
- Use positive phrasing

## Practice

Instructions: Replace the following negative phrases with a more positive approach.

Negative	Positive
1. "I don't know."	
2. "That's not my job."	
3. "You need to talk to someone else."	
4. "It won't be ready until ..."	
5. "You should have called sooner."	
6. "That's not our fault."	
7. "That's against our policy."	
8. "The only thing we can do is ..."	
9. "You're wrong."	

## Build rapport

### Accept responsibility and take ownership

- Take control of call
- Direct the conversation
- Use closed-ended questions
- Clarify and summarize
- Use your name twice: when first receiving the call and after the customer has vented
- Give the customer choices
- Avoid holds and transfers, but if you must, handle them effectively

### Effective holds

- Explain why you are putting the customer on hold.
- Never say, "Hang on" or "Hold on." Say, "I am going to put you on hold, okay?"
- After you put a customer on hold, check back every 30-45 seconds.

### Effective transfers

- Transfer only if necessary.
- Make sure you're transferring the call to the right person or office.
- Alert the person to whom you are transferring the call.
- Explain why you are transferring the call and to whom.
- Give the customer the phone number and extension in case they need to call back.

A Service Star not only establishes rapport with customers, they also take ownership of each and every call. They handle as many as possible without transferring the customer or putting them on hold.

Example of using your name: "My name is \_\_\_\_\_ and I am glad that I am here to take care of that problem."

**Holds:** People dislike being put on hold because they feel they are in limbo, they feel powerless and that they may be left on hold indefinitely.

**Transfers:** Customers usually don't mind being transferred once. But more than that—they're irate. When transferring a caller, think of yourself as a "verbal escort". Explain the benefit of being transferred to the customer—in terms of saving time, greater knowledge, quicker action, etc.

**Be a verbal escort**

- Alert the person to whom you are transferring the call
- Explain why you are transferring and to whom
- Stay on the line to introduce both parties



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Another hallmark of a Service Star is the ability to explain company policies without putting down his or her employer or the customer. Complete the activity to gain experience translating a corporate policy into a customer-oriented explanation. Walk them through an example such as requiring a deposit or requiring a specific due date. Then have participants work in pairs or small groups working on their own examples. Debrief the activity by sharing responses with the entire group and evaluating them using the questions in the workbook.

## Build rapport

### Explanation practice

Instructions: Identify a policy or procedure that you have had to explain to a customer that you would like to share in a simpler or more effective way:

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Now, revise your explanation taking into consideration the following:

- Is it complete from the customer's point of view?
- Does it contain any unnecessary information from the customer's point of view?
- Is the language as simple as possible?
- Are the benefits to the customer clear?

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# Components of customer service

- Friendliness
- Competence
- Reliability


## What's different over the phone?

- No ability to read gestures and body language
- No other information for the customer to rely on
- Harder to build trust

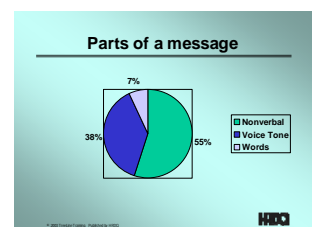
Friendliness: builds rapport.  
Competence: takes ownership, follows through.  
Reliability: builds trust, the customer knows they will get exactly what they want and need.  
Discuss Mehrabian's study: 55% of a message is communicated through nonverbal gestures and body language, 38% through tone of voice, and only 7% through the words themselves. So, talking on the phone eliminates the largest aspect people usually rely on to communicate—tone of voice and words become much more important.  
Ask participants what other information customers might rely on when dealing with an organization in person.  
Possible answers: the physical environment, other customers.

**Components of service**

- Friendliness
- Competence
- Reliability



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An effective CSR plays many roles and can quickly determine which role is most appropriate.

**Activity:** Ask participants to name the various roles, and characteristics of the roles as a CSR. **Debrief** by reviewing the overheads. The components of customer service correlate to the three roles:

friendliness=Friend;

competence=Detective;

reliability=Teacher

Friend: acts as a host, makes the caller feel comfortable, doesn't make promises that can't be kept. Use the Friend role as your initial mode when talking to a customer and when the customer has experienced poor service.

Detective: solves problems, is persistent. Use when the customer has a problem.

Teacher: gently educates, is never condescending. Use when the customer is unsure or misguided in what they need.

Direct participants to the appendices at the back of the workbook. Have them complete the self-assessments for each role.

## Identify your role

### Who are you?



riend





etective



eacher



**Friend**

- Acts as host
- Makes caller feel comfortable
- Does not make promises that cannot be kept
- Use initially or when customer has experienced poor service





**Detective**

- Solves problems
- Is persistent
- Use when the customer has a problem



**Teacher**

- Gently educates
- Is never condescending
- Use when the customer is unsure or misguided in what they need



## Role practice

Read the description of each caller and identify which role is most appropriate.

Scenario	Most appropriate role
1. Ramon Rivera placed an order two weeks ago and hasn't received it. The order was supposed to be delivered in 3-5 days.	
2. Shirley Smith is comparison shopping and has already phoned two of your competitors. She's calling again with detailed questions.	
3. Patty Peterson is starting to lose her cool—she has been transferred twice and was cut off trying to track down her refund.	

Have participants complete this activity in pairs or small groups. Debrief by sharing answers with the entire group. Answers: Ramon: the Detective role is most appropriate. Shirley: the Teacher role is most appropriate. Patty: the Friend role is most appropriate.

Ask participants what bugs them the most about customer calls. Some of the most frequent comments you will hear are, "They ramble, they don't know what they want, they never get to the point," etc. The ability to take control of a call will head off many of these irritations. Taking control of a call has three parts: proper etiquette, building rapport, and ending effectively.

Note that "use the customer's name" is mentioned a couple times on the next few pages. It's important, and it's important not to overdo it as well. Two to three times is appropriate for a typical conversation.

Transfers: Ask participants for their ideas on how to avoid saying the word transfer, then show the overhead examples to debrief.

Detractors: To illustrate the voice-tone detractors, repeat the same statement three times (for example, "Thank you for calling Bigcorp. How may I help you?"), each time using a different detractor (apathetic, condescending, robotic).

## Use proper etiquette

Be polite

Use the customer's name (Ms. Tanaka, Mr. Riley, Dr. Gunther) unless they tell you otherwise

Handle "holds" effectively

Ask permission-and wait for an answer

45-60 seconds maximum—call back if it will be longer

Thank the customer for holding, but don't apologize for putting them on hold

Handle transfers graciously

Avoid saying the word "transfer"

Pass along all known customer information so they don't have to repeat themselves

Stay on the line—be the glue between and customer and the person who can help them

Avoid voice-tone detractors

Apathetic

Condescending

Robotic

### Taking control of the call

- Use proper etiquette.
- Build rapport.
- End the call diplomatically.



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### Alternatives to "transfer"

- "Let me connect you with ..."
- "Let me have you speak with ..."
- "Ms. Jones can help you with that. Let me connect you with her."

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# Listening skillfully

## Active listening

- Eliminate distractions
- Suspend judgment
- Do not interrupt
- Tolerate silence
- Take notes
- Ask questions
- "Friend" questions
- Elaborate on needs and wants
- Draw out feelings
- Reassure the customer
- "Detective" questions
- Obtain specific facts
- Guide the conversation to a particular focus
- Clear up generalizations
- "Teacher" questions
- Interpret what you heard the customer say
- Clarify or expand on the customer's comments
- Suggest course of action
- Paraphrase and restate to confirm understanding

Another core skill for providing customer service is listening and asking appropriate questions.

Eliminate distractions: discuss the difference between external (noise, the customer's accent, etc.) and internal (self-talk, other things on your mind, being tired, etc.).

Do not interrupt: show you are listening with phrases such as "uh huh, I see, yes," etc.

Tolerate silence: let slower talkers take their time getting their story out—it will save you time in the long run.

Take notes: tell the customer you are taking notes.

Questioning techniques: "Friend" questions tend to be open-ended.

"Detective" questions tend to be closed-ended.


"Teacher" questions are often a combination.

Paraphrase: this is not the same thing as repeating.

Demonstrate the difference.

**Skillful listening**

- Eliminate distractions.
- Suspend judgment.
- Don't interrupt.
- Tolerate silence.
- Take notes.
- Ask questions.
- Paraphrase to confirm understanding.



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Tell participants this is where they get to practice their new skills in a no-risk environment. Note: There will be time for about six rounds of practice (each being about ten minutes). Have participants work in groups of three and change roles after each round—one being call center rep, the second a the customer describe in the scenario, and the third observer/coach. For each scenario, have participants act out their designated roles. Have the observer use the space provided in the Appendix to take notes. Feedback should be aimed at how well the call center rep builds rapport, takes responsibility, handles angry customers by empathizing and allowing them to vent. The final question practices skills for transferring customers. Debrief by asking what skills were easiest to master and what areas they feel they need more practice.

## Role plays

Instructions: Work in groups of three to practice what you've learned about becoming a Service Ace. Designate roles: customer, call center rep, and observer/coach. Read each scenario and practice the skills you've learned. The observer/coach will offer feedback (use the space provided in the appendix to take notes). Change roles after each scenario.

### Role play 1

A customer who received a duplicate billing is calling. The error was supposed to have been corrected on his last statement, but the charge has shown up again on his current statement. How do you handle this call?

### Role play 2

A customer is calling because her phone line was turned off by mistake (she has paid her bills on time and in full). She's yelling and threatening to sue. How do you handle this call?

### Role play 3

A customer is calling because they have changed long-distance carriers (to a competitor). However, they are still being charged an access fee from Sprint every month. This is the second time they have called to complain. How do you handle this call?

## Role plays

### Role play 4

You've just successfully handled a customer's problem and now have an opportunity to determine what additional services may serve her needs. How do you probe without pushing too hard or offending the customer?

### Role play 5

An upset customer is calling. He says that this is the third time he's called and the previous rep he spoke with promised him she would take care of his problem, but he hasn't heard from her in a week. He's complaining that no one has taken responsibility to solve his problem and he's right. How do you handle the call?

### Role play 6

A customer is calling and asks for some information you need to look up. You realize you need to transfer the customer to another department and the customer was already transferred once to you. How do you handle the call?








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