



THE CUSTOMER SERVICE COLLECTION

SELF-STUDY WORKBOOK



The 7 Steps to Perfect Telephone Etiquette

“Turn new callers into lifelong customers”

Discovery Workbook

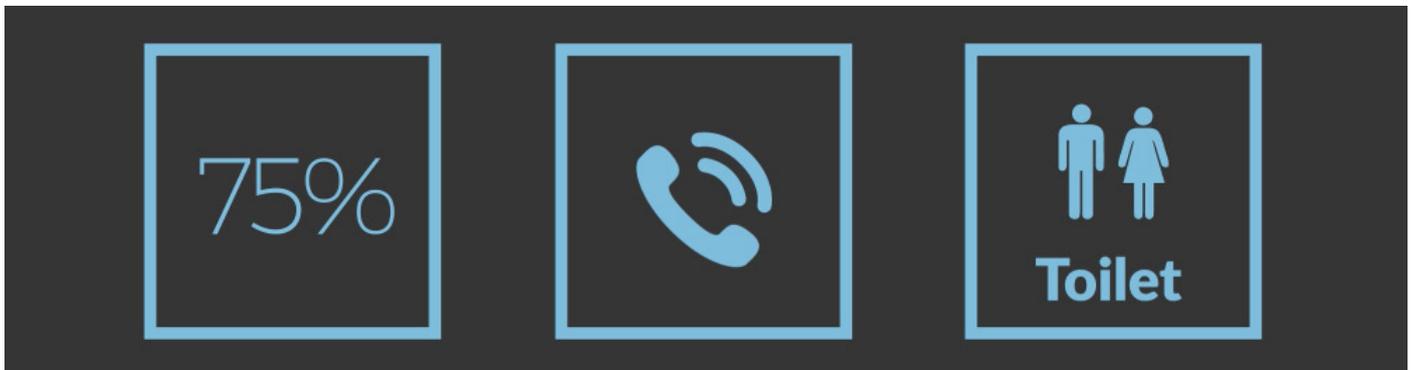
NAME



TELEPHONE ETIQUETTE

Is It Really That Important?

Did you know 75% of adults admit to using their phone whilst going to the bathroom!



With statistics like that – it’s no wonder so many customers think telephone etiquette is getting worse.

Every time you make or receive a call at work the conversation you have with customers will shape their entire perception of your company.

As the saying goes:

YOU NEVER GET A
SECOND CHANCE
.....TO MAKE A
FIRST IMPRESSION

...and amazingly, it takes just 6 seconds for the caller to make an impression of your business.



If you ‘WOW’ them – you could create a customer for life.

But get it wrong and the customer could hang up the phone for good.



STEP 1 ANSWERING THE CALL

Let's take a look at the seven steps to perfect telephone etiquette – so you can turn every new caller into a lifelong customer.

How long are you willing to wait from someone to answer your call before hanging up?

The reality is, the longer a customer has to wait to talk to a person, the harder it will be to satisfy them once their request is finally made.

Whilst it's not always possible to answer all calls within three rings, your aim should be to keep waiting times and abandonment rates to a minimum.

And when you speak to the customer – you must answer in an upbeat tone.

This means being happy – even if it's your 100th call of the day. If you're upbeat and positive, you'll be better positioned to dispel any angry or upset customers before they even speak a word to you.

TOP TIP

One thing you could try to stay happy – keep a little mirror at your desk above your phone with a note that says “smile!” - The reason is not psychological but rather physiological. When you smile, the soft palate at the back of your mouth raises and makes the sound waves more fluid. For those of you who sing in a choir (or in the shower), you know that the wider you open your mouth and the more teeth you show, the better tone you get. The same applies on the telephone. Smiling helps your voice to sound friendly, warm, and receptive.

TAKEAWAY

Answer all calls promptly and in an upbeat tone.

CHALLENGE – ANSWERING THE PHONE RULES

How you answer the call sets the tone for the conversation and gives the customer an instant perception of your company. Challenge yourself to ALWAYS give a positive first impression by following the basics:

- 📞 Aim to answer the phone within 3 rings
- 📞 Greet the caller politely in a friendly tone
- 📞 Give your name and company name
- 📞 Ask the customer how you can help them

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STEP 2 BEGIN WITH AN INTRODUCTION

When you meet someone new face to face, you usually begin by introducing yourself.

And the same should be true at the beginning of phone calls.

So start every call with an introduction that includes your name and the company you work for.

You can also add the department you work for and a phrase like “how can I help you?”

This will let the caller know they’ve reached the right person and you’re ready to assist them.

TOP TIP

It’s a good idea to ask for the customer’s name and use it throughout the conversation to personalise the transaction.

TAKEAWAY

Always identify yourself.

In business situations, it’s appropriate to answer the phone with your name and the company you work for.

CHALLENGE – HOW WILL YOU ANSWER THE PHONE?

Fill in the blanks below with details specific to your company:

DIRECT LINE (A LINE THAT GOES STRAIGHT TO YOUR DESK):

“Good Morning/Afternoon - this is , how may I help you?”

COMPANY PHONE (RECEPTION OR GENERAL INCOMING AREA):

“Good Morning/Afternoon - , this is , how may I help you?”

DEPARTMENT PHONE (LINE THAT GOES TO A SPECIFIC GROUP OR DEPARTMENT):

“Good morning/afternoon - , this is , how may I help you.

NOTES

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STEP 3 GIVE YOUR FULL ATTENTION

You need to pay attention to your customer – not your co-workers.

In an office or call centre environment, colleagues and external noise can be very distracting.

But when you're speaking with a customer you must stay focused.

Make sure you concentrate on what your caller is saying.

You can't do this when you're multi-tasking. The customer on the phone deserves the same attention as a customer you'd deal with face to face – so avoid handling other tasks whilst on the phone so you can give that customer your undivided attention for the entire conversation.

TOP TIP

You shouldn't allow interruptions to occur during conversations. This means no side conversations with people around you. The person on the telephone takes precedence over someone who happens to walk in the office or passes by whilst you are on the phone.

But if you must interrupt, try saying to the customer: **"Please excuse me for a moment – I'll be right back"**

When you return, make sure you remember to thank them for holding.

TAKEAWAY

Pay attention to customers – not co-workers when on the phone.



STEP 4 TAKE GOOD NOTES & REPEAT

Get your pen and paper at the ready!

When on the phone to a customer, get into the habit of making short quick reference notes, including questions or points you wish to raise or comment on.

When your caller has finished speaking, you can refer back to your notes and take action.

If you're thinking of answers and responses whilst the customer is speaking, chances are you're not really listening.

By taking notes and repeating them back, the customer will know you were listening and you'll be able to resolve their issues quickly.

TOP TIP

Recap the facts: this means summarise and reflect back on the notes you've taken to check you heard the key facts and content of the customer's conversation correctly. It also lets the caller know you've understood them. Statements such as "what I'm hearing is..." and "sounds like you're saying..." are great ways to reflect back and summarise.

TAKEAWAY

When listening to the customer, make sure you take good notes on their issues and repeat them back.

CHALLENGE – HOW TO TAKE NOTES QUICKLY

When speaking to a customer you need to take notes quickly, but it can be hard to keep the notes neat and organised so you can use them – practise these steps to learn how to do it:

STEP 1

Get a sheet of paper or notepad ready before answering any call. Needless to say, you'll need a pen or pencil too.

STEP 2

Include the date at the top of the page and the customer name. This will come in handy later and you can keep notes in order in a file.

STEP 3

Listen carefully. Tough one, but if you don't listen, you can't take accurate notes.

STEP 4

Create a note format. For each customer issue (if multiple) give that its own line/ title and then include bullet pointed items to describe the issue underneath.

STEP 5

Indent issue titles and indent bullet pointed items underneath your topics. This will help you organise the content.

STEP 6

Only write down key words or phrases, not full sentences.

STEP 7

If the customer is speaking too quickly, politely ask them to repeat any issue you don't feel you have appropriately captured.

STEP 8

Practise taking notes quickly by hand. You might want to develop your own shorthand so you can take notes super quick.

STEP 9

When the customer has finished talking, spend some time talking them through the notes you have taken to make sure you have captured all points.

STEP 10

Keep your notes safe in a file, in date order. Even better, why not type up your notes at the end of the day. If you do, you will create a great customer reference guide.



STEP 5 AVOID ANNOYING HABITS

If the thought of hearing someone eating or chewing gum whilst you speak to them on the phone sends shivers down your spine – you're not alone.

A recent study found 80% of us think using the phone whilst eating is rude.

It even has a name – Misophonia – which means the hatred of sound.

Whether it's a true psychological disorder, or just a shared annoyance – sufferers of Misophonia have feelings of disgust, anger or frustration brought on by certain sounds, commonly associated with others eating.

Hardly the feelings you want your customers to experience when talking to you.

So make it a hard and fast rule that you don't eat or chew when you're on the phone.

TOP TIP

Don't eat at your desk. If you cram in a lunch whilst e-mailing, picking up the phone and shuffling paper you will miss the fullness signals (so you overeat) and you'll miss the pleasure signals (so likely just grab an unhealthy lunch) because your attention is somewhere else. Make a habit of eating away from your desk.

TAKEAWAY

The noise of you eating on the phone can seriously irritate and anger your customers. Make sure you don't do it.



STEP 6 RESOLVE ISSUES IMMEDIATELY

If you can, you should aim to resolve your customer's issues while you have them on the phone.

As the first point of contact, the customer will be looking to you for answers, so make sure you address that straight away.

If you do, the customer will gain confidence in you and your company.

The key to achieving this is to always be prepared. Understanding your company, the departments, key personnel and decision makers will save you valuable time and allow a quick response to customers.

Why not create a 'cheat sheet' – a handy reference guide to help you deal with customer calls quickly.

TOP TIP

Avoid putting people on hold for more than 30 seconds. 30 seconds is a lifetime to an angry customer on hold. If you believe it will take longer than 30 seconds to help your customer, tell them so and offer to call them back. When you call back, give a specific time and date in which you will call so they can know when to expect an answer.

TAKEAWAY

Try to resolve customer issues while you have them on the phone.

CHALLENGE – CHEAT SHEET

Use the template below to help build a cheat sheet perfect for your company. Fill in each section and refer back to it next time you get stuck on the phone.

CUSTOMER QUESTION CATEGORIES

E.g. I need more information.

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COMMON CUSTOMER QUESTIONS

What are the common customer questions you face – also capture simple responses to these questions.

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EMPLOYEE RESPONSIBILITIES

What department or roles are responsible for complaint resolution?

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KEY DEPARTMENTS

List the key department names and numbers for quick reference.

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STEP 7 END ON A POSITIVE

No matter how the conversation with the customer progresses, try to end it on a positive note.

It helps to repeat your action plan and next steps so the customer knows exactly what to expect in terms of a solution to their issue.

Even if you've not solved the problem completely, make sure you have resolution in terms of follow up action.

Remember – the last few sentences of your conversation will be what the customer remembers best, so keep it friendly and proactive at the end.

It's best to finish the call by thanking the customer for calling.

TOP TIP

Follow through on all calls. If you promise information, try to call back promptly or have someone else call for you if you can't return the call promptly.

TAKEAWAY

Always end a call with positivity, a resolution and most importantly – a thank you.

ACTION PLAN

KEY SKILLS (WHAT ARE THE KEY SKILLS YOU HAVE LEARNT DURING THIS COURSE)

WHAT WILL YOU DO DIFFERENTLY IN THE WORKPLACE?

WHAT OBSTACLES MIGHT GET IN THE WAY OF YOU ACHIEVING THIS?

WHAT, OR WHO MAY HELP YOU OVERCOME THESE BARRIERS?

