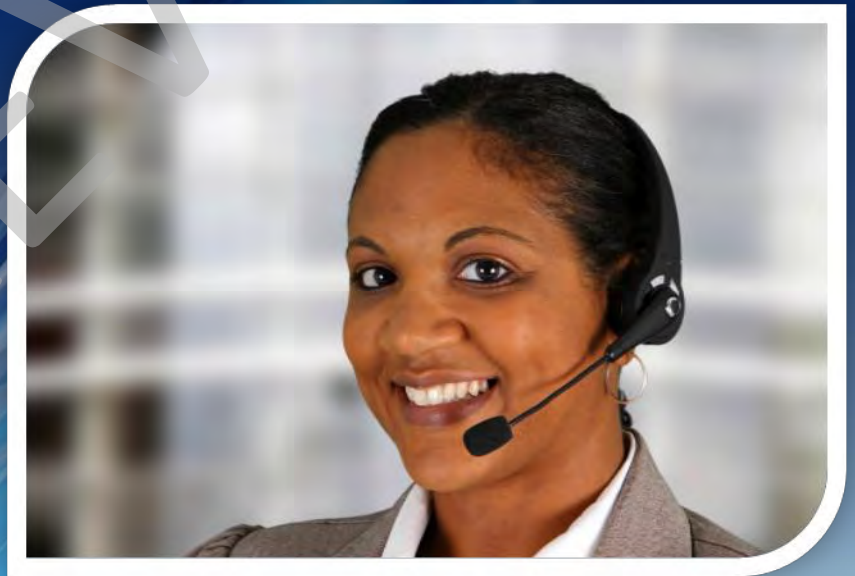


REPRODUCIBLE TRAINING LIBRARY

Customizable Soft-Skills Courseware

Customer Service over the Phone



Instructor Guide

Copyright © 2008 by HRDQ
Published by HRDQ
Authorized distributor Dekon Business Solutions

Phone: 0040 734 350 525
Web: www.dekon.biz

The Microsoft name, Word®, PowerPoint®, and Outlook® are the property of Microsoft Corporation.

Cover image copyright © 2013 by Rob Marmion. Used under license from Shutterstock.com.

The material in this publication is provided “as is.” HRDQ disclaims any warranties, expressed or implied, regarding its accuracy or reliability, and assumes no responsibility for errors or omissions. To the extent permissible by law, HRDQ accepts no liability for any injuries or damages caused by acting upon or using the content contained in this publication.

ISBN 978-1-58854-524-4
EN-02-MY-13

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.

Contents

Please note: Only the pages highlighted in yellow below are those featured in this preview.

Licensing agreement.....iv

Instructional design and learning philosophyv

Course timingvi

Course objectivesxi

Module One: Customer Service Over the Phone

Learning objectives..... 2

Developing a Service-Centered Attitude..... 3

Build rapport 4

Components of customer service 7

Identify your role 8

Role practice..... 9

Use proper etiquette 10

Listening skillfully..... 11

Role plays 12

Module Two: Handling Angry Customers

Learning objectives..... 16

Handling angry customers 18

Saying "no" in a positive way 22

Overcoming mistakes..... 23

Strategies for staying motivated..... 24

Module Three: Coaching for Accountability and Results

Learning objectives..... 26

Nine keys to effective leadership 27

Service ace rubric..... 28

How to give feedback that improves performance 31

Positive reinforcement..... 33

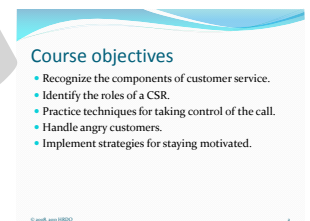
Appendix

Service roles self-assessment.....	36
Building rapport assessment	39
Action plan	41
Course review	43
Solutions for every training challenge	45

Course objectives

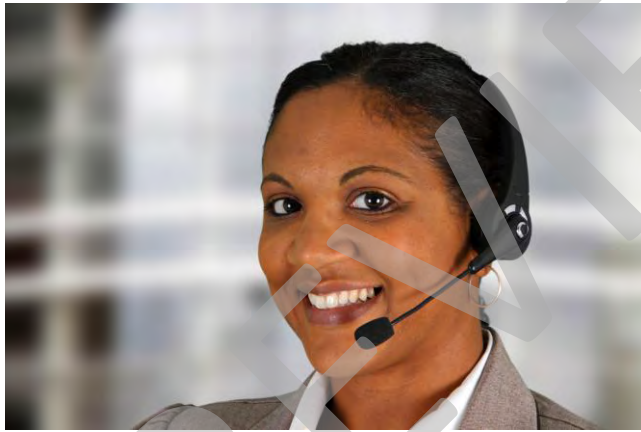
Successful completion of this course will increase your knowledge and ability to:

- ◇ 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



PREVIEW


ModuleOne



CUSTOMER SERVICE OVER THE PHONE

Statistics

- Satisfied customers tell 4 to 5 others.
- Dissatisfied customers tell 9 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."	

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.



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."

Handling angry customers

Understanding why customers get mad is not enough—you need to know how to handle tough customers.

Ask participants for examples of common signs of losing your cool. Expect answers such as: throat tightens, sweaty palms, heart pounding, face flushed, fists clenched, etc.

Lead participants through a demonstration of deep breathing.

A calming object can be a family photo, memento from a vacation, funny saying, etc.

Buy time by putting the customer on hold *briefly* or asking questions.

Calming customers: Never say, “Calm down.” That only makes people angrier.

Instead, let them vent and express their feelings. Of course, you don’t have to listen to verbal abuse.

Trigger words are especially noticeable over the phone without body language to soften them. Ask for examples of trigger words (“We can’t, policy, you didn’t”).



Stay calm yourself

- ◇ Recognize your own signs of losing your cool
- ◇ Practice deep breathing
- ◇ Get a drink of water
- ◇ Use positive self-talk
- ◇ Look at a calming object
- ◇ Buy time if necessary

Calm them down

- ◇ Let them vent
- ◇ Avoid trigger words
- ◇ Empathize
 - Drain emotions first
 - Move to problem solving when the customer is ready

Solve their problem

- ◇ Agree on the situation
- ◇ Prioritize if there are several issues involved
- ◇ Determine the solution
 - Involve the customer: Ask them to recommend a solution
 - Offer two options if possible
 - Avoid transferring to your supervisor
- ◇ Follow up
 - Keep the customer informed

Overcoming mistakes

- ◇ Apologize sincerely
- ◇ Take responsibility
 - Do not blame or make excuses
- ◇ Solve the problem quickly
 - Do what is most useful to the customer, not what is easiest for you
- ◇ Do something extra

Case study

Nancy Edwards buys a \$2500 computer and pays \$75 for next-day delivery. She calls the following day because she has not received her computer and needs it for an important presentation. You look up the order and see that it was not shipped because you did not receive authorization on her credit card. Ms. Edwards is extremely irate because she did not receive a call from credit informing her of a problem. She demands to speak to a manager.

What would you say to this customer?

How would you resolve this situation?

Sometimes the reason for a customer's anger is a mistake made by you or your organization. Resolving it effectively can convert lukewarm customers into lifelong customers. Review the points and brainstorm ideas for doing something extra in your organization. It may be waiving shipping fees or offering overnight delivery at no extra charge or including a coupon for dollars off their next purchase.

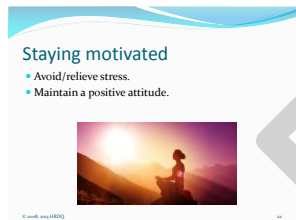
Case study: Have participants work in small groups. Allow several minutes for them to read and answer the questions. Possible response: "Ms. Edwards, you must be very frustrated. I can help you. I'll contact the credit department and see what delayed the authorization. Then I'll call you back and we'll make plans to get your computer to you." Second question: Get Ms. Edwards' input—perhaps shipping the computer that day and waiving the shipping fee (assuming no actual credit problem).

Being a CSR is a high-stress job. It's easy to burn out and get cynical. Use these strategies to combat burn out and stay positive.

Review the points and demonstrate easy stress-relieving stretches that can be done at your desk. Examples: pressing shoulder blades back, shrugging shoulders up to ears and dropping, gentle head rolls, rotating ankles, etc. Maintaining a positive attitude: Give examples of self-talk.

You can combine this with the next point by providing humorous examples of self-talk. Acting "as if": Tell participants to think of a time they were grouchy or mad at home and the phone rang—they probably answered with a polite tone even though they didn't feel that way.

Track successes: keep a piggy bank on your desk and deposit a quarter every time you handle a difficult customer effectively, or simply post a chart at your desk and place a check each time a call goes well.



Strategies for staying motivated

Avoid/relieve stress

- ◇ Use your breaks wisely
 - Walk
 - Read
 - Listen to music
 - Eat healthy snacks
 - Don't whine
- ◇ Give yourself an anchor
 - Photo
 - Memento
 - Favorite quote
- ◇ Develop a buddy system
 - Limited venting
 - Coaching/encouragement

Maintain a positive attitude

- ◇ Self-talk
- ◇ Sense of humor
- ◇ Act "as if"
- ◇ Track successes

How to give feedback that improves performance

1. Set the tone

- ◇ Open the conversation with a question that gets the other person's agreement to have a discussion
 - "Can I get your input on something?"
 - "I've reviewed your call observation and wanted to talk over a few things. Is now a good time?"

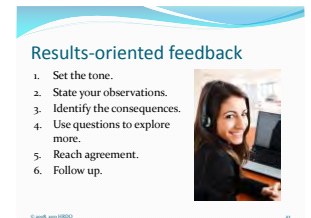
2. State your observations

- ◇ Use statements that focus on behavior and the facts as you state your observations and perceptions.
 - "I noticed you had trouble handling the customer's request and seemed frustrated after the call."
 - "When the VP asked who was interested in participating in the next level of training, I noticed you didn't raise your hand. I'm curious about your reasons."

3. Identify the consequences

- ◇ Explain the consequences or impact of the situation. Focus on organization-wide, team and personal goals.
 - "I'm concerned that the call contributed to the customer's perception that Sprint representatives are not knowledgeable."
 - "We need to meet our goals of minimizing service errors and the additional training will be beneficial to all reps."

The first part of coaching for results is developing a consistent set of standards and using them (the rubric). The second part of coaching for results is conveying evaluations in a manner that makes call center reps receptive to the feedback. Additionally, the feedback must be focused on observable behavior changes in order to be effective. The six-step process (summarized on the slide) walks you through this process. This page looks at the first three steps of the improvement process.



Course review

1. What are the three components of customer service?

2. The different roles a CSR can play over the telephone include which of the following:
 - a. Friend
 - b. Foe
 - c. Scientist
 - d. Disciplinarian
 - e. Detective
 - f. Receptionist
 - g. Teacher
3. Proper etiquette for a CSR includes which of the following. Check all that apply.
 - Always use the customer's first name
 - Asking permission to put customers on hold
 - If necessary to leave customers on hold for longer than 45-60 minutes, call back.
 - Transfer as many calls as possible
 - Thank the customer for calling
4. Active listening means having long periods of silence.
 True False
5. When you or your company made a mistake that has upset a customer you should do which of the following:
 - a. Apologize sincerely
 - b. Transfer the call
 - c. Accept responsibility
 - d. Let them know how lucky they are
 - e. Give them something extra

1. Friendliness, competence, and reliability
2. Friend, detective, and teacher
3. Ask permission to put the customer on hold and thank the customer for calling
4. False
5. A, C, and E

What our Clients Say about the Reproducible Training Library

“I have used many of the *Reproducible Training* programs and I can't say enough good things about them. The content is easy to tailor—I've even combined programs to meet my clients' specific needs. Not only am I able to provide my clients with a professionally developed, customized program at a reasonable price, but I've saved myself a lot of time and frustration, too. I plan to buy more programs in the future. I highly recommend them!”

Rosemary C. Rulka, MS, SPHR
President
R.C. Rulka Consulting, LLC

“We chose the *Reproducible Training Library* for the open-source format and customizable materials. The programs are well structured and rich with content. Preparation to delivery was less than 2 hours, and the addition of our company themes make the materials look like they were designed in house.”

James T. Puett
Manager, Leadership and Organizational Development
Healthways Human Resources

Delivering high-quality, customized training has never been simpler.

The *Reproducible Training Library* is your comprehensive source for soft-skills content that's downloadable, customizable, reproducible, and affordable. From communication and leadership to team building, negotiating, and more, our experts have done the development work for you. Whether you use the materials “right out of the box” or tailor the content to your needs—download to delivery takes just a few clicks.

Features and Benefits

- *Instant Access:* Your program is available to you for immediate download.
- *Quality Content:* Top-notch development enables you to deliver a rich program.
- *Ability to Customize:* Make the program yours, or use it “right out of the box.”
- *Unlimited Use:* Reprint the materials as much as you like, as often as you like.

Get Started Today!

Have questions?

Contact us at 0040 734 350 525 or office@dekon.biz.