



Your Passport to Professionalism:

## Phones

Steps in this module:

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1. **Learn: Read the following document.**
2. **Go to Check Your Success and complete the reflection activity.**

### Step 1—Learn

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#### Introduction

**Did you ever throw your phone against the wall in frustration when calling an organization?** Or, at least you wanted to. Don't you just hate voice mail jail? You are put on hold, bounced to different phones, and forced to leave a message when you only have a simple question to ask. Or, you get some bubble head on the organization's line who can't help you. Poor phone management can quickly spoil a good relationship between your customers and your organization.

Phones are still the most frequently used method of communication between customers and organizations, although emails are catching up. Every workplace has two kinds of customers: Internal customers, who comprise the members of your organization's team, and external customers, who are looking to you for help.

Exemplary customer service *builds on the Golden Rule*: Always do for others what you would like them to do for you. This applies to phone service and is the reason you need to use the best practices available to manage your workplace phones.

## The Basics

In today's world most callers are glad to be speaking with a human being instead of a machine. Your goal should be to keep it that way. Here are some strategies that will help you.

### Answer the Call!

What could be more basic to good phone service than answering the phone? Make it a priority, and answer all incoming phone calls **before the third ring**.



*Tip: If the person in your unit who is charged with answering the phone is busy, **pitch in and answer it**.*

### Be Understood

Another basic principle for phone service is to make yourself understood.

- *Speak clearly. **Enunciate.*** Sometimes people answer the phone and speak so fast that the customer is not even sure they have the right department. Read this as fast as you can: *"ThisisxyzcompanySallyspeakingcanIhelpyou?"* Sounds all too familiar. You need to slow down so the caller can understand what you are saying.
- **Pause** between phrases and ideas for clarity.
- Avoid using bureaucratic phrases and workgroup **jargon** that your customer may not know. *"John is in the RISA doing EAS reports with the COO for the SOS team."*
- Keep your **voice** volume moderate and vary your vocal pitch.

*TIP: **Avoid speaking in a monotone** that puts your customer to sleep. Avoid sounding like a tour guide repeating information in a sing-song voice. Talk to a customer as if they are a friend you are telling a story to sitting right there in front of you. Make it interesting and engaging.*

### Introduce Yourself



It is common courtesy to identify yourself. Also, to avoid confusion in case of misdialing or misdirection, tell your callers what department they have reached.

*"Main Library. This is Jim Johnson speaking. How may I help you?"*

### **Be Positive and Personal**

One business puts mirrors in front of the phone answering staff so they can see themselves smiling as they talk on the phone. It actually makes a difference. Even though you can't smile and shake your customers' hand over the phone, you can greet them with equivalent **warmth and welcome**. Develop a positive phone personality: train your voice and vocabulary to be positive even on a "down" day. Your introduction sets the tone for the call. Get off on the right foot by being friendly and cheerful.

- After the introduction, **use the customer's name** – nothing communicates warmth more than using a person's name during your call. Ask them to repeat their name if needed.
- An upbeat but authoritative manner works well
- Avoid using negative phrases like: "that's not possible"; "forget it"; " why didn't you...?"; "never heard of it"; and "it's against policy."

*TIP: Instead of saying, "I don't know", say, "Let me find out about that for you."*

- Be yourself. Even when you are dealing with negative clients, keep a **friendly tone**. It's amazing how rude a customer on the phone can be to you, but once you transfer them to the boss they are all smiles and kindness. Sometimes you are the buffer, the punching bag, so that your boss can deal with the customer more appropriately. Just accept it as part of your role and don't take it personally.

### **Listen**

As with all service to customers, it's important listen to the client and probe for information. Instead of assuming you know what the customer needs, let the customer tell you.

- Give the person time to think and speak
- Clarify: ask open-ended questions to draw out the customer's issues and concerns
- Take notes on the highlights

*TIP: Before you act on a request, **check your own understanding** by restating the customer's issue.*

## Close the Call Appropriately

Close the call in ways that the customer feels well served and appreciated.

- If you have made **promises**, assure the customer that you will fulfill them.  
*"I understand that you are on a deadline. I'll make sure that Mr. Bean sees your message as soon as he comes in."*
- **Thank your callers** and let them know their business is appreciated.  
*"I'm glad you called today, Mrs. Franks. We're happy to serve you."*
- Make sure that you and the customer have the **same expectations** about what needs to happen next.  
*"Once you have submitted your interlibrary loan, it should take between one and two weeks to fill. We will contact you by email when it arrives."*
- **Follow up:** As soon as possible, take the steps you need to ensure that the customer's needs will be met.



## Managing calls

### Preparing for a Call

When you make a call for work, **plan the basics of the conversation in advance**: What is the reason for the call? What are some important points you need to make? What are some desired outcomes?

*TIP: If the conversation wanders, you can use your plan to get the conversation back on track.*

### Using Voicemail

If you have to leave a voicemail, keep it short. Your conversation plan can help you keep your message brief. If there are too many details to relate, simply explain the topic and ask for a reply. Let the person know if you need a reply by a certain time.

#### **Specify the form of reply you prefer (Return call? Email? Meeting?)**

*"Hi Jerry, this is Connie Smith. I am calling to confirm your arrival time and location for the presentation. I just sent you an email with the information"*

*you should need, but if you have a question please call me at this number by 5pm tomorrow 555-555-5555. Once again, that is 555-555-5555. Thank you."*

**Slow down!** One of the **most irritating mistakes** people make is speaking too fast when leaving the return call number. **Always** enunciate the number, then **repeat it** once again *s-l-o-w-l-y* so that the person has time to grab a pen and write it down.

*TIP: If you have a private phone line, rehearse your voicemail messages before recording them. Be as brief as possible. For example, isn't it stating the obvious to tell your caller that you can't come to the phone now? Does it make a difference what else you might be doing (on the phone; away from your desk)? If your voicemail system announces the date and time before a message is played back, why ask your caller to leave that info?*

### Putting a Caller on Hold

If you have to put callers on hold, briefly explain why and for **how long**. Ask if they would **prefer a call-back** instead of being put on hold. (If they do, ask for a call-back number, and get back to them as soon as possible.)

*"I need to check with my supervisor about that, Mr. Allen. It may take me a few minutes to find her. Would you like to hold, or would you like me to you back?"*

Provide callers on hold with progress reports every 30 to 45 seconds. Offer them choices if possible.

*"That line is still busy, Mr. Allen. Will you continue to hold or should I have Dr. Gray call you back?"*

### Using the Speakerphone

Use the speakerphone **only when necessary**. That usually means when you need more than one person to be in on the conversation at your end. Speaker phones have a very distracting delay in the transmission. Your voice sounds like you are in a cave. The microphone/speaker picks up all the background noise around you. These things can be **very distracting**. Always ask permission before putting someone on the speakerphone, and always identify others who are listening in. Do your best to ensure that the call is not overheard by disinterested parties.

*TIP: If you're in an office, close the door and, if you can, mute music or other potentially distracting sounds.*

## Transferring Calls

If answering phones is part of your job, knowing how to use your telephone customer service system is critical. It should be one of the first things you learn.

Before attempting to transfer someone, make sure you can do it correctly. Learn both ways to transfer a call.

- 1) You should be able to transfer the caller so that the new extension rings or goes directly to voicemail.
- 2) You should also know how to talk to a contact at the transfer extension before you put the caller through. Use this method if you are not sure you are sending the caller to the right work unit.

*TIP: If you don't know the steps to transfer callers, keep a list of instructions by the phone.*

Do your best to avoid a customer being passed around from office to office, or worse, getting lost inside a system with no option to talk to a real person. Knowing which work groups are responsible for which functions across the organization, especially those whose functions connect with those of your unit, will help.

Before you transfer a caller **exchange information**. Record the caller's name and number so that you can call them back if you need to. Give the caller the extension number of the transfer so that, if the call is dropped, he or she will not have to start again with you.

## Handling Complaints

Angry customers on the phone often say things that they wouldn't if you were face to face. When you become involved with irate customers on the phone, with a major exception: You will not be able to project your empathy through your facial expression and body language. Therefore, **you will need to use your words and your tone of voice to impart your willingness to help**. Here's a recap of the major strategies for handling angry clients.



TIP: Research indicates that if you don't interrupt an angry customer, the average time they will complain is about 1 minute. You must let them complete their complaint or they will keep complaining.

It is common for an angry customer's story to be a jumble of accusations and emotions. The claims the customer is making may sound doubtful or far-fetched. *Don't assume* that it is. Give them the benefit of the doubt: There are several possible reasons for the miscommunication:

- They may just be **doing a poor job of explaining** what happened or what they need.
- They could be **describing the situation as they perceived** it without intending to mislead.
- They **may have been confused** by the original information.
- They **may not have received** information they should have gotten.

You will help yourself and your customer manage the situation successfully if you **listen patiently** and help your customer clarify his or her facts and feelings, needs and concerns.

### Step 1: Summarize what they said

A very important step in defusing an angry customer is to summarize the complaint, and ask them "did I understand you correctly?" For example, after a customer complains about not being notified of an important deadline, you might say:

*"You are upset because we told you that we would email you when the deadline arrived, but you received no notice from us. Is this correct?"* Wait until they say "yes" or give you more clarification. Repeat what you heard so that they know you understand their complaint.

### Step 2: Empathize

Rather than immediately looking for a solution, simply say

**"I can understand why you would be upset. That would upset me too."**

Or...

**"I understand that it bothered you."** Or...

**"I'm really sorry that you had to go through that. It must have been very frustrating."**

Remember, this is not accepting blame or agreeing with their complaint. It's simply showing them that you heard them and understand why they are upset.

### **Step 3: Ask how they would like to resolve the issue**

Rather than *telling* them what you can do, simply *ask* "**how can we resolve this for you?**" Or, "**what would you like us to do?**" Then wait for their suggestion. If it's a reasonable request, then you can do what they want and it will be solved. If the request is unreasonable you simply say, "I don't have the ability to do what you ask, but here's what I can do for you." Explain what you *can* do, and ask, "**is this okay with you?**"

Once you arrive at a workable solution, thank them.

*"Thank you for telling us about this. We appreciate it when people let us know how to improve our services."*

- **If needed, offer to have your supervisor talk to the caller.**

### **Your cell phone at work**

So, you walk into an office and see a staff person on their cell phone. What do think is happening? A private conversation is going on. In most business settings, they do not use cell phones to conduct business. So, if your boss walks by your desk at work and sees your cell phone on the desk, or sees you talking on your cell phone, what do they conclude? That you are more interested in private calls than business. There are some exceptions to this, but not many.

Leave your cell phone in your backpack and turn it off while you are at work. It is extremely rare that you need to check your phone while at work. Keep it out of sight.

### **Your cell phone for conducting business**

Whenever possible use a land-line to make business calls. If that is not possible, get into a very quiet space and use your cell. Cell phones are inferior to land lines. They amplify background noise, have a half a second transmission delay, and have poor microphones. Many managers will purposely cut short cell phone calls because of the distractions. But if a cell phone is all that is available make sure you minimize those distractions.

## In Closing

People who call for service expect to be treated well and they are surprisingly quick to judge if they aren't. The quality of your phone service can easily be the difference between a happy customer and a disgruntled one. As described in this module, quality telephone service is evidenced in the way you approach your responsibilities and your customer with a positive attitude, plan for good communication, listen effectively, and manage the phone system. As with all good customer service, it rests on the Golden Rule.

**Continue on the next page...**



## Step 2—Check Your Success

### Application

1. Read the case study below.
2. Based on your understanding of good telephone customer service as outlined above, rate and explain your score for the employee's call management.

### Script of the Call

#### Call #1

#### *Call to campus Library.*

Employee: [with energy] This is Jenny Brown in the Main Library. How may I help you?

Caller (student): I'm calling about my interlibrary loan.

Jenny: I'll be glad to check on that for you. What is your name?

Tom: Tom French.

Jenny: What type of information did you request?

Tom: It was about the Depression.

Jenny: Was it a book, an article, or some other type of information?

Tom: Oh, it was a book.

Jenny: OK, Tom. I need a minute or so to check on it. Do you want to hold, or should I call you back?

Tom: I'll wait.

[Jenny returns]

Jenny: Sorry for the wait, Tom. There's nothing with your name on it on the shelf. When did you put in your request?

Tom: Yesterday.

Jenny: I see the problem. The interlibrary loans come from other libraries. It can take up to two weeks to fill a request. You'll receive an email when it comes in. You can also call back next week. I'll be glad to check on it again.

Tom: But I need it tomorrow so I can write a paper.

Jenny: I can make a note to notify you right away if it comes in, but you should probably make other plans. Do you need some help finding other sources for the information you need?

Tom: I guess so, but I really wanted that book.

Jenny: Come in to the library as soon as you can and ask for help at the desk. We'll be glad to help you find something. The Depression is a popular topic. We should be able to find you what you need.

Tom: I hope so.

Jenny: The library is open until 11:00 tonight. We open up again at 8:00 tomorrow morning. Is there anything else I can help you with?

Tom: No.

Jenny: Thanks for calling, Tom. Good luck with your paper.

Tom: Thanks, bye.

Jenny: Goodbye.

## Call #2

### ***Call to the campus Library.***

Employee: Library.

Caller (student): I'm calling about my interlibrary loan.

Employee: What is your name?

Tom: Tom French.

Employee: Hold on a minute (puts Tom on hold)

[Employee returns]

Employee: It's not there.

Tom: But I need it tomorrow so I can write a paper.

Employee: The form says you'll get an email when it comes in.

Tom: I really needed that book, I've waited a week already.

Employee: You can't expect the Inter Library Loans to come in one week. They take a long time. You should order them ahead of time.

Tom: I just hoped it would arrive in time.

Employee: It's written in bold on the order form you filled out "*up to two weeks delivery time*"

Tom: But what am I supposed to do now?

Employee: I guess you'll have to find something else.

Tom: [sarcastically.] That's just great. Hangs up

[Tom hangs up.]

Employee: [To receiver] Don't take it out on me if you procrastinate!

**Go to the following chart and explain call #2**

**Analyzing the call**

Aspect of call #2	Good	OK	Poor	Comments (explain your rating)
The employee's introduction				
The employee's ability to clarify the caller's issues				
The employee's ability to be understood by the caller				
The employee's skill as a listener				
The employee's empathy				
The employee's helpfulness to resolve the issue				
Concluding the call				

**Complete the reflection exercise on the following page, save and review with your supervisor or mentor for feedback and guidance.**

Phones		Name of Student:	
<p>A. Write a script of the introduction you plan to use when you pick up the phone on the job.</p>		<p>B. You have a required choir rehearsal on a day you have been scheduled to work. Plan the phone call you will make to tell your supervisor.</p>	
<p>C. When you make the call that you planned in item 3, your supervisor does not answer the phone. Script the voicemail message you will leave her or him.</p>			