

CUSTOMERS ON THE PHONE

WORKSHOP GUIDE



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LEARNING OBJECTIVES

At the end of the session delegates should be able to identify and deliver a good structured call which leads to a positive customer outcome.

Each delegate may be given a Personal Action Plan to record any learnings and personal development commitments that they make as a result of this training.

INTRODUCTION

This guide is designed for a manager or a facilitator to deliver a short workshop featuring videos from the Video Arts Customer Service Essentials Series. Each video comes with a series of activities around the following structure:

LOOK - watch the video and reflect on the content and message.

THINK - activities and questions linking the video to their own experience and workplace.

REMEMBER - a summary of the key learning points.

Each section relating to the video will last around 15 minutes.

PRACTISE - At the end of the series of videos there is a 30 minute practical training exercise which will bring the learnings together. Delegates should be encouraged to record any personal development actions on their Personal Action Plan sheet.

FEATURED VIDEOS

- First impressions on the phone (Yup?)
- Controlling the call (I could rustle up a Morris Dancer?)
- Agreeing actions (Thanks for calling the coastguard - goodbye!)

VIDEO 1 - FIRST IMPRESSIONS ON THE PHONE

LOOK (play the video, 3 minutes)

This time we are in a police station when the phone rings. It's someone reporting a bank robbery, but the call doesn't get off to a good start, meaning that the poor caller gets taken hostage and has to wait until our 'Good Service' comes on duty to pick up the pieces.

THINK (discussion, 10 minutes)

Why is the opening of a call so important?

Because it confirms that the customer has reached the right people and that something will happen. This removes anxiety and sets a good start to a constructive conversation. It also gives the Adviser a chance to prioritise the call if necessary.

What are the key ingredients of a good opening to a phone call?

A company name, a verbal handshake (exchange of names), an offer of help will usually suffice.

What is our organisation's standard opening for phone calls, is there one? How effective is it? How can it be improved?

REMEMBER – (recap, 2 minutes)

When you're on the phone, answer right away and use a verbal handshake. Smile as you talk, and introduce yourself.

- Answer straight away
- Use a verbal handshake
- Smile as you talk and introduce yourself

VIDEO 2 CONTROLLING THE CALL

LOOK (play the video, 3 minutes)

'Bad Service' is manning the emergency services phone lines when an urgent call from a very distressed customer comes in. 'Bad Service' jumps to conclusions and musters up all the assistance possible.

THINK (discussion, 10 minutes)

What did 'Bad Service' do wrong in the first instance?

He jumped to conclusions and didn't seek to understand the bigger picture before reacting.

What is the basic call structure that worked well the second time?

Greeting, open questions, summarised information, suggested next actions, closed the call.

Have any members of the group experienced customers who have over-reacted, and how did they deal with it?

REMEMBER – (recap, 2 minutes)

Control your call by sticking to a structure, asking open questions when you need to and show that you are listening. Record and repeat information so the caller feels connected.

- Use open questions
- Show that you're listening
- Record and repeat information

VIDEO 3 AGREEING ACTIONS

LOOK (play the video, 3 minutes)

Our customer is found all at sea, literally. He is calling the Coastguard who takes all of his information but fails to agree next steps, until 'Good Service' steps in to rescue the situation.

THINK (discussion, 10 minutes)

What does 'Good Service' do well?

Taking and recording information, summarising the information received.

Why is it important to agree next actions on every call?

You need to manage customer expectations clearly and effectively. If next actions are not agreed there could be a wide difference in what a customer expects to happen next.

REMEMBER – (recap, 2 minutes)

When closing the call, don't leave your customer 'lost at sea'. Agree actions and how they'll be followed up. Volunteer useful information and agree the next steps.

- Agree actions and how they'll be followed up
- Volunteer useful information
- Agree next steps

CUSTOMERS ON THE PHONE – PRACTISE

In this exercise delegates will practice their skills at recording and summarising information.

The Trainer should read a short statement, and the delegates have to record this in their own words in 140 characters or less, whilst capturing the relevant information.

A sample passage has been given below, but you may prefer to use a Company product or service guide.

Mr Jones called yesterday, and spoke to Marsha. He wanted to order 2 wardrobes but we only had 1 in stock in oak, but we did have 2 in walnut so he decided to take the walnut instead of the oak this time as he needs the wardrobes as soon as possible. The full price is £400 but we agreed to do a discount for him so he will only have to pay £300. He's an existing customer and has loads of our products in his house in Leeds. Usually he goes to the shop in the Trinity shopping centre. These are going to go in the bedroom on the second floor of his house. He is at home on Saturday morning as his wife is taking his children swimming and so he would like to arrange delivery for then. He has said that he would like to pay the drivers cash on delivery, which I have agreed, and we also promised to do delivery for free for him as he is such a good customer.

Key Information - (use current date)

Marsha DD/MM/YY Mr Jones existing cust order 2 walnut wardrobes £300 free delivery Saturday morning Leeds, 2nd floor cash on delivery

The key information above is 113 characters, 132 with spaces and contains 13 key pieces of information.

Delegates can swap papers for marking. Each piece of key information is awarded 1 point, the person with the most points wins!

The trainer can discuss the consequences of any missing information, some examples of this are below.

No adviser name, no one to be able to refer to internally,

No name, customer won't get his order

No cash on delivery, company loses revenue

No free delivery, customer gets over charged

At the end of this practical exercise delegates will be more aware of the value of recording information succinctly and accurately.

Invite each delegate to capture at least one thing that they will do differently in their workplace as a result of this exercise.