

COMMUNICATING ON THE PHONE

WORKSHOP GUIDE



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LEARNING OBJECTIVES

This course aims to give you the skills to use the telephone effectively in a business context.

This guide is designed for a manager or a facilitator to deliver a short workshop featuring videos from the Video Arts Workplace 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.

ACTION PLAN - At the end of the series of videos and activities delegates should be encouraged to share the most important actions they will take and record actions on their Personal Action Plan sheet.

FEATURED VIDEOS

- Phone greetings
- Phone skills
- Closing the phone call

VIDEO 1 – PHONE GREETINGS

LOOK (play the video, 3 minutes)

The telephone can be a very powerful communication tool and yet we often overlook its strengths and weaknesses because we are so familiar with it.

THINK (10 minutes discussion)

Ask the group to think back to a bad call they've experienced with a colleague or customer. What was it that made the call so uncomfortable? How can we improve the way we deal with customers or colleagues over the phone?

Suggest the following points to the group;

Keep it simple

- The greeting you use to answer the phone can set the tone for the whole conversation so keep it simple and professional.
- Good morning/afternoon/evening is a great start, and it's a good idea to say the name of your company too. That way, your callers can be sure that they've reached the right place.

Be positive and polite

- The person you're talking with on the other end of the call doesn't have the contextual benefit of seeing your body language.
- Voice tone can also sometimes be lost through the phone line, so it's important to make sure you speak clearly, positively and politely.
- Smiling really does make a big difference to the sound of our voice.

REMEMBER (recap, 2 minutes)

- Answer the call in three rings.
- Put a smile in your voice.
- Introduce yourself.
- Ask if it is convenient.

VIDEO 2 – PHONE SKILLS

LOOK (play video, 3 minutes)

A customer's first impression of you is formed during their first few seconds of contact over the phone, or in person. It's key to engage them, be polite and show you understand and are clearly listening to them.

THINK (10 minutes discussion)

Think back to a time when you've dealt with a customer or colleague complaining over the telephone. How could you have improved the way you dealt with the call? Suggest the following steps to the group,

Actively listen

- Let them talk through their problems and get it all out of their system.
- As they talk, make indications that you are listening such as "uh huh", "really?", etc.
- Use their name as much as you can.

Allow the client to express their opinions

- Allow them to communicate their feelings however they choose to, without passing judgement.

Be empathetic

- Make sure the customer knows that you understand their frustration and acknowledge any mistakes that have been made.
- Recognise the customer's feelings about the mistakes - that is, how it must have felt to be the customer in this situation.

Know when to ask open or closed questions

- Asking open questions such as how, what and where, signals to the caller that you are taking them seriously.
- Asking closed questions will help you nail down an agreement or establish facts.

Record and repeat

- Ask about the facts and details of the matter at hand to make sure the situation is clear in your own head.
- Show the customer you understand and have taken note of their complaints by repeating what they have said.

REMEMBER (recap, 2 minutes)

- Use the caller's name.
- Use active listening.
- Record and repeat information.

VIDEO 3 – CLOSING THE PHONE CALL

LOOK (play, video 3 minutes)

Always end what started off as a bad call with a customer on a positive note, with a clear resolution to the problem and a clear plan you both agree on.

THINK (allow 10 minutes)

Have the group ever ended a call with a supplier, customer or colleague not really having a firm plan in place? How do you leave the caller reassured that a resolution has been made?

Gain agreement on your resolution

- Make sure your client understands what has been done at the end of the call. Even if the issue is not totally resolved, gain agreement on the resolution that was reached.
- Example 1 (total resolution): "So just to confirm, I have walked you through reinstalling your application and now everything works - correct?"
- Example 2 (pending resolution): "So just to confirm, we have decided that your toaster is in need of a repair under warranty and I am sending you a box to ship it back to us - correct?"

Follow up

- Call the customer back to make sure the agreed plan was carried out.
- Check the customer has everything they need from you.

Write a clear, concise report

- Document every major point of the call. It's not important to note every single word uttered, but keep a record of anything that may assist others who deal with the customer in the future.

REMEMBER (recap, 2 minutes)

- Agree actions and follow them up.
- Volunteer useful information.
- What happens next?

COMMUNICATING ON THE PHONE – ACTION PLAN

Remind the group of the key learning points from this session.

Divide the group into pairs. Ask each member of the group to identify one specific action they will take to apply what they have learned when they return to work.

Ask for two or three examples. Bring the session to a close.