

# TELEPHONE COURTESY & CUSTOMER SERVICE

Lloyd C. Finch



"I was delighted by the results when my staff applied several of the suggestions and techniques in this easy-to-read book."

Alice McCarthy  
Manager, Lockheed Corporation

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# PREFACE

Welcome to **Telephone Courtesy and Customer Service**. You have been selected for this training because your manager feels you are an important provider of customer service for your organization.

This book has been written so that you can complete it in a relatively short time. The important thing is to carefully read the material, understand it, and apply it to your job.

There are four sections in this book. **Section I** provides objectives for the reader, defines a quality customer service provider, and discusses service responsibility. **Section II** discusses telephone techniques and their importance to providing quality service. **Section III** explains customer “wants and needs,” and describes the importance of a positive attitude. **Section IV** teaches the reader how to manage “Customer Perceptions”.

Keep this book near your work location for reference. By using it regularly you will learn correct telephone techniques and develop the personal skills required to provide the best possible customer service.

Applying the telephone customer service skills in this book will help you become a professional provider of quality customer service. This should be your objective.

Get out your pencil, relax, and enjoy this book.

Happy Reading!

Lloyd Finch

TELEPHONE COURTESY & CUSTOMER SERVICE is divided into four sections. Each section is designed to help you progress toward the goal of providing quality customer service when using the telephone.

The objective of each section is:

- Section I — To understand the basics of providing high quality customer service.
- Section II — To learn proper telephone techniques.
- Section III — To understand the customer.
- Section IV — To manage the customer's perception and understand the essential role customer service plays in the success of your company.

The four objectives are interrelated. Good customer service cannot be provided until all four are understood and applied.

Being a professional customer service provider (regardless of your title or position) is an essential key to the ultimate success of any organization. This makes you a very important person.



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	The Telephone and Time Management	53-X
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	Developing Self-Esteem	66-1
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	Finding Your Purpose	072-8
	Concentration!	073-6
	Plan Your Work/Work Your Plan!	078-7
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	Training Methods That Work	082-5

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	Wellness in the Workplace	020-5
	Personal Wellness	21-3
	Preventing Job Burnout	23-8
✓	Job Performance and Chemical Dependency	27-0
	Overcoming Anxiety	29-9
	Productivity at the Workstation	41-8
	Health Strategies for Working Women	079-5

## **CUSTOMER SERVICE/SALES TRAINING**

	Sales Training Basics — Revised	02-5
	Restaurant Server's Guide — Revised	08-4
	Effective Sales Management	31-0
	Professional Selling	42-4
	Telemarketing Basics	60-2
	Telephone Courtesy & Customer Service — Revised	64-7



## **CUSTOMER SERVICE/SALES TRAINING (CONT.)**

<b>V</b> Calming Upset Customers	65-3
<b>V</b> Quality at Work	72-6
Managing Quality Customer Service	83-1
Customer Satisfaction — Revised	84-1
<b>V</b> Quality Customer Service — Revised	95-5

## **SMALL BUSINESS/FINANCIAL PLANNING**

Consulting for Success	006-X
Understanding Financial Statements	22-1
Marketing Your Consulting or Professional Services	40-8
Starting Your New Business	44-0
Direct Mail Magic	075-2
Credits & Collections	080-9
Publicity Power	82-3
Writing & Implementing Your Marketing Plan	083-3
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# CONTENTS

Preface	i
<b>Section I Quality Customer Service</b>	<b>2</b>
Customer Service Is Everyone's Responsibility	3
The Importance Of The Telephone In Your Organization	4
<b>Section II Proper Telephone Techniques</b>	<b>6</b>
Handling The Telephone	7
Your Voice Inflection	9
Your Best Voice	10
Addressing The Caller	12
Answering The Telephone	13
Effective Listening	14
Managing Objections	16
The Art Of Negotiation	19
The Service Follow Up Call	23
Asking Questions	24
Making The Outbound Service Call	30
Delivering Bad News	31
Recognizing & Managing Caller Behavior	32
Managing The Customer Callback	35
Some Statements To Avoid	36
Closing The Conversation	40
<b>Section III Understanding Customer Needs</b>	<b>41</b>
What Your Customer Wants	43
Attitude Is Your Key To Success	48
<b>Section IV Managing The Customer's Perception</b>	<b>54</b>
Case Study: The Wholesale Widget Company	55
The Customer's Perception: An Exercise	57
The Customer Service Call	60
Your Telephone Service Skills Inventory	63
Developing A Personal Action Plan	64

# SECTION I

## QUALITY CUSTOMER SERVICE

Quality customer service is provided by a person like you. A quality customer service provider is a person who:

1. ACCEPTS RESPONSIBILITY FOR PROVIDING TIMELY CUSTOMER SERVICE IN A COURTEOUS MANNER.
2. UNDERSTANDS THAT THE SUCCESS OF AN ORGANIZATION DEPENDS ON GOOD CUSTOMER SERVICE.
3. LEARNS AND PRACTICES CUSTOMER SERVICE SKILLS IN A POSITIVE MANNER.

Often employees are so busy there is little time to think about their jobs or how they relate to the overall success of the company. Sometimes, those who spend much of their day on the telephone talking with outsiders don't consider their jobs to be very important. The fact is, that anyone regularly involved with customer contact has one of the most important jobs in that organization. Following are some points to consider:

- THE SUCCESS OF A COMPANY DEPENDS ON CUSTOMERS. THESE CUSTOMERS WILL NOT RETURN UNLESS THEY ARE TREATED PROFESSIONALLY AND IN A COURTEOUS MANNER.
- MANAGERS NORMALLY TALK WITH ONLY A FEW CUSTOMERS EACH WEEK. OTHER EMPLOYEES TALK WITH DOZENS EACH DAY.
- ANYONE DEALING DIRECTLY WITH CUSTOMERS OCCUPIES A POSITION OF TRUST.
- COMPANIES WITH REPUTATIONS FOR OUTSTANDING SERVICE WERE BUILT OVER TIME, BY PEOPLE LIKE YOU.

# CUSTOMER SERVICE IS EVERYONE'S RESPONSIBILITY

When we think about customer service it is common to think that certain individuals or departments are the only ones responsible for providing that service. However, in most organizations customer service departments represent only a portion of the overall service responsibility. Everyone, from president to clerk provides customer service, and as such contributes to a company's reputation for service and courtesy.

If all employees learned to provide the service concepts presented in this book, the reputation of that company with customers would be considered "excellent".

In the next few pages, you will learn about telephone techniques to help you become more professional when you are on the phone with customers and clients.

Learning good techniques and skills is essential; but not as important as applying what has been learned on a daily basis.

**QUESTION:** DAVE IS A LOBBY RECEPTIONIST FOR ACME SYSTEMS INC. HIS RESPONSIBILITIES INCLUDE REGISTERING AND PROVIDING SECURITY BADGES FOR ALL NON-EMPLOYEES WHO ENTER THE BUILDING. IS DAVE RESPONSIBLE FOR CUSTOMER SERVICE?

**ANSWER:** YOU BET!

## THE IMPORTANCE OF THE TELEPHONE IN YOUR ORGANIZATION

Think for a moment about the role of the telephone where you work. Chances are it would be difficult to conduct business without it. Although there are salespeople and other representatives who meet face to face with customers to generate business, the telephone is probably responsible for most customer contacts.

On an average day, do you know what portion of your customers receive service over the telephone as compared to being contacted in person by a representative of your company? Although companies differ, it is not unusual to have more than 80% of customer contact provided by telephone.

If your company happens to be one where a majority of customer contact is by telephone; do you know who is primarily responsible for the company's customer service reputation? (check one)

\_\_\_ Those who meet face to face with the customer?

\_\_\_ Those who talk with customers on the telephone?

\_\_\_ Managers and supervisors?

The best answer is those who use the telephone.
---

Having answered this, who then in your opinion is responsible for providing good customer service? (check all that apply)

\_\_\_ Me    \_\_\_ the managers    \_\_\_ the sales department

\_\_\_ officers of the Company    \_\_\_ our telephone receptionists

\_\_\_ our clerks    \_\_\_ the delivery people    \_\_\_ our outside service people

\_\_\_ the technical support staff    \_\_\_ others

If you checked all of the choices, you get an "A". The most important check mark however belongs next to the word "Me"!
---

# DIAGRAM OF A QUALITY CONSCIOUS COMPANY

The diagram below illustrates how a customer is viewed by the best customer service companies.



Please notice that the customer is at the top of the PYRAMID but supported by marketing and sales and dependent on the rest of the company to give them the attention they deserve. Keep this diagram in mind as you learn about telephone techniques that can help provide quality customer service.

## SECTION II

### PROPER TELEPHONE TECHNIQUES

Proper Telephone Techniques are essential to provide quality customer service. In the following pages you will learn the most important telephone techniques. How effectively you use them is up to you.

#### TELEPHONE TECHNIQUES

1. HANDLING THE TELEPHONE	Page 7
2. YOUR VOICE INFLECTION	Page 9
3. YOUR BEST VOICE	Page 10
4. ADDRESSING THE CALLER	Page 12
5. ANSWERING THE CALL	Page 13
6. EFFECTIVE LISTENING	Page 14
7. MANAGING OBJECTIONS	Page 16
8. THE ART OF NEGOTIATION	Page 19
9. THE SERVICE FOLLOW UP CALL	Page 23
10. ASKING QUESTIONS	Page 24
11. MAKING THE OUTBOUND SERVICE CALL	Page 30
12. DELIVERING BAD NEWS	Page 31
13. RECOGNIZING & MANAGING CALLER BEHAVIOR	Page 32
14. MANAGING THE CUSTOMER CALLBACK	Page 35
15. SOME STATEMENTS TO AVOID	Page 36
16. CLOSING THE CONVERSATION	Page 40



## TELEPHONE TECHNIQUE ONE: HANDLING THE TELEPHONE

Features of the telephone need to be understood. These features are designed to help you handle calls smoothly. At first glance they may seem complicated but normally are easy to use. To better understand the capabilities of your telephone read about the available features, and/or ask a more experienced person to explain them to you. Then practice until they become automatic.

Joan needed to transfer a caller to a co-worker. She wasn't sure how to do it. After quickly reading the instructions Joan made the transfer. The caller was disconnected. If Joan had spent a few minutes practicing the call transfer feature, the disconnect would not have occurred.

- The time to learn about your telephone is ahead of time. Don't practice on the caller. Be familiar with all of the features.
- Hold the transmitter portion of the telephone directly in front of your mouth. If the transmitter is held away from your mouth you risk not being understood.

Keep in mind that speaking on the telephone requires better articulation than is necessary in face to face conversations.

- Place the telephone on your desk so the receiver will be picked up without banging into anything. No one likes unnecessary noise.
- Avoid side conversations while talking on the telephone. Your party deserves your full attention. Do not attempt to carry on two conversations at the same time.

## HANDLING THE TELEPHONE (continued)

- Make sure the caller is placed on hold before discussing his or her situation with a co-worker.

Wouldn't it be embarrassing if you told a co-worker that a caller didn't sound too smart, only to discover that he/she was listening?

- Never eat or drink while talking. If your mouth is full when the telephone rings, wait a few seconds before answering.
- Answer in as few rings as possible. A maximum of three rings is a good standard.

Some organizations have a "Three Ring Policy". Check to see if yours does.

- When you place a caller on hold to answer another line; ask for permission and WAIT FOR AN ANSWER.

**EXAMPLE:** Would you mind holding while I answer my other line? Wait for the customer to say; "Sure go ahead." Too often you hear; "please hold" and the person is gone.

- If you have several callers on hold, remember the priority of each call. If necessary, make notes of who is holding and on which line.

Nothing is more irritating than to answer the question, "Who are you holding for?" several times.