

# **TELEPHONE COMMUNICATION**



**SKILLS & ETIQUETTE**

How do you feel about your telephone skills? The following questionnaire gives you the opportunity to analyze your strengths and weaknesses.

Read each statement and then beside each statement, mark the appropriate space. More importantly – BE HONEST WITH YOURSELF!!!!

	Always	Sometimes	Never
1. I answer the telephone promptly.	_____	_____	_____
2. I have a standard way of answering the phone at work.	_____	_____	_____
3. I avoid making personal calls from my business telephone.	_____	_____	_____
4. I identify myself when I answer the phone at work.	_____	_____	_____
5. I try to make my calls brief and businesslike.	_____	_____	_____
6. I have a process model that I use to help handle problems.	_____	_____	_____
7. I am an excellent listener.	_____	_____	_____
8. I speak clearly and carefully in telephone conversations.	_____	_____	_____
9. My speaking voice is pleasant.	_____	_____	_____
10. I am a skilled questioner.	_____	_____	_____
11. I use the telephone everyday to speak to customers or clients.	_____	_____	_____
12. I know how to overcome the challenges and limitations of telephone communications.	_____	_____	_____

13. I can comfortably use all of the features of the telephone system at work.

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14. I use a consistent form for taking telephone messages.

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15. I always organize my thoughts before I make a call.

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Your goal is to change all your “no” responses to “yes” responses by the end of this training seminar.

Are you ready?

Good Luck!

## SECTION ONE: BUSINESS USE OF THE TELEPHONE

The telephone is the most important means of communication in business. Billions of business telephone calls are made each year. It's hard to imagine a business operating efficiently without a telephone. When the service is interrupted, even for just an hour or so, businesses complain loudly about their losses!

Without the telephone, organizations would be a mess. Business would grind to a halt. The slowness of written communications and the time and costs associated with face-to-face meetings would soon become intolerable. In fact, we've had reliable business telephone service for so long that it has become an integral part of the way we do business.

### THINK ABOUT IT....

How many times during an average workday do you use the telephone?

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What kinds of business activities do you typically handle over the telephone?

- \_\_\_\_\_ Taking dictation
- \_\_\_\_\_ Servicing customer accounts
- \_\_\_\_\_ Setting up appointments
- \_\_\_\_\_ Taking customer orders
- \_\_\_\_\_ Answering customer inquiries
- \_\_\_\_\_ Selling
- \_\_\_\_\_ Providing information
- \_\_\_\_\_ Setting up meetings
- \_\_\_\_\_ Handling complaints
- \_\_\_\_\_ Giving directions
- \_\_\_\_\_ Discussing issues
- \_\_\_\_\_ Leaving messages

- \_\_\_\_\_ Providing customer support
- \_\_\_\_\_ Clarifying situations
- \_\_\_\_\_ Sharing ideas
- \_\_\_\_\_ Confirming arrangements / appointments
- \_\_\_\_\_ Making travel plans
- \_\_\_\_\_ Ordering supplies

You can see from the above that the majority of your business is conducted over the phone.

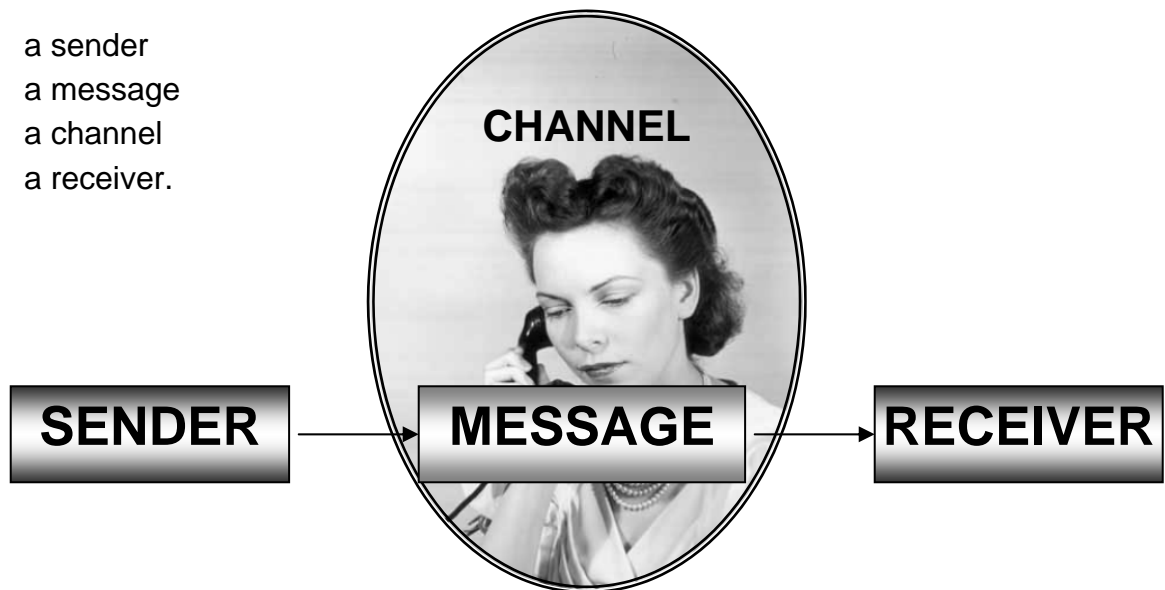
## SECTION TWO: THE CHALLENGE OF TELEPHONE COMMUNICATION

### A SIMPLE COMMUNICATIONS MODEL

Telephone skills are communication skills. The following examines a model of the communications process and notes the challenges associated with telephone communications. It sets up a logical framework for the telephone skills you will be reviewing later.

Human communications is a process transferring information (thoughts, opinions, ideas and attitudes) from one person to another. The simplest communication process always involves 4 parts:

- a sender
- a message
- a channel
- a receiver.



- A **sender** is the person who has information to convey to another person.
- The **message** is the information to be communicated.
- A **channel** is the means or medium of communication. The channel might be the telephone wires, a printed page of a letter or even data transmission over wires from computer to computer.
- A **receiver** is the person who takes in the information that is sent.

## **Applying the Communication Model**

Now think of the communication model in the context of person-to-person telephone conversations. In a normal face-to-face communication situation, the sender is the speaker, and the receiver is the listener. The message is the words that are spoken, plus the visual cues the speaker provides, and the channel is the air. Now, in a telephone conversation, the channel is the telephone wire. The sender and receiver can no longer see each other. The channel prevents them from using visual cues – facial expressions, body language, and gestures – to help convey and interpret the message.

By using the communication model, you can see how telephone communication differs from face-to-face conversation. The channel is different (wires) and the message is different (no visual cues). The telephone requires extra effort for effective communication.

## **PROBLEMS IN TELEPHONE COMMUNICATION**

We've become creatures of telephone habits. Having made and received thousands of telephone calls in our lifetimes, it is easy to assume that we have more than adequate telephone skills. Most people do not even think there are any special challenges of telephone communication.

When all parts of the communications process work effectively together, telephone communication is clear and useful. Sometimes even a well-practiced communication process can go awry. Problems can occur in any of the four parts of:

- Trouble sending: The sender mumbles his/her words, speaks in an obscure language or whispers. What happens to the message? Will it be received?
- Trouble with the message: The message is confusing, disorganized or irrational. Is it likely that the receiver will understand what is being communicated?
- Trouble with the channel: There is noise or interference in the channel. Will the message be transmitted effectively? Will it be received?
- Trouble with the receiver: The receiver is not listening closely, has fallen asleep or is distracted. Will the message be understood?

## THINK ABOUT IT...

Have any of these telephone communications problems happened to you? Check those you've experienced; then add any others you've known.

### Problems related to the Sender

\_\_\_\_\_ The Sender speaks too softly. You have to ask the Sender to speak up.

\_\_\_\_\_ The Sender talks a mile a minute. You have to ask the Sender to slow down.

\_\_\_\_\_ The Sender talks so slowly you want to fill in with your own ideas or anticipate what is going to be said.

\_\_\_\_\_ The Sender mumbles.

\_\_\_\_\_ The Sender talks so loudly you have to hold the telephone handset away from your ear.

Other problems:

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### Problems related to the Message

\_\_\_\_\_ The Speaker uses slang vocabulary/technical language that you do not understand.

\_\_\_\_\_ The Speaker repeats the Message too many times.

\_\_\_\_\_ The information is disorganized or the Message is confusing.

\_\_\_\_\_ The Message is in a foreign language that you do not understand.

\_\_\_\_\_ The Speaker assumes you already know the information or have background related to it.

\_\_\_\_\_ The information is too detailed for effective telephone communication.



Other problems:

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### **Problems related to the Channel**

- \_\_\_\_\_ There is static or buzzing on the line.
- \_\_\_\_\_ There is background noise coming from the Sender's location (radio, TV, cellphone keeps breaking up, radio etc.)
- \_\_\_\_\_ The connection breaks, leaving you with a dial tone.
- \_\_\_\_\_ There is an echo on the line.

Other problems:

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### **Problems related to the Receiver**

- \_\_\_\_\_ The Receiver doesn't acknowledge that the Message is being understood.
- \_\_\_\_\_ The Receiver doesn't engage in a conversation.
- \_\_\_\_\_ The Receiver is distracted and stops paying attention to the Sender.
- \_\_\_\_\_ The Receiver is sidetracked or goes astray.
- \_\_\_\_\_ The Receiver is conducting another conversation at the same time.
- \_\_\_\_\_ The Receiver is not listening.
- \_\_\_\_\_ The Receiver cannot understand or decipher the Message.

Other problems:

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You have without a doubt experienced many of the problems on this list and you probably added a few of your own.

So why focus on the problems of telephone communication? A telephone conversation is a complex process with special challenges. If not managed well it can, and will, break down. If any of the parts of the process is out of balance, the telephone conversation will fail to achieve its purpose.

In a personal telephone call, you usually don't need to worry about these elements. In a business situation, telephone communication is much more important. Effective business use of the telephone entails much more than simply dialing a number and opening a dialogue.

## SECTION THREE: KEY TELEPHONE SKILLS

### THREE KEY SKILLS

Three key telephone skills for business telephone calls:

- Listening
- Questioning
- Speaking

These three skills are the basis for audible human communication and form the core of any business conversation. Mastery of these skills guarantees improved business telephone communication.

### Listening

Listening is not the same thing as hearing. Hearing is a physical ability that requires no intellectual effort. As long as you are physically equipped to receive sounds, you can hear. Listening on the other hand, is more than simply hearing sounds. It is an active process that requires both hearing and thinking.

**Listening during a Conversation:** A conversation implies two-way exchange of information. In real-life conversations, of course, the sender and receiver continually switch roles. People engaged in conversation spend some of their time talking (sending information) and some of their time listening (receiving information). Normally one person speaks while the other one listens, and vice versa.

In an average telephone conversation, you can expect to spend about 50% of your time listening. Why does this fact shock us? It is because when we think about a telephone conversation we think about talking and not really listening. Listening is a critical communication skill that can make a difference in your ability to do business on the telephone.

**What Happens When You Don't Listen?** Most of us tend to be impatient. We go through the motions of listening because we can hardly wait for our turn to talk.

An initial comment made by the speaker often triggers an on-target response in your mind. Most of us have a tendency to seem to be listening by making appropriate facial expressions or by staying quiet during a telephone conversation. We get so wrapped up in thinking about our response that we often fail to listen. That can be disastrous in a business telephone call.

Some serious risks are associated with failing to listen during a telephone conversation. When you don't listen effectively, you may...

- Misunderstand the speaker's problem or concern.
- Jump to conclusions without knowing all the facts.
- Give incorrect information to the caller.
- Confuse the caller with an inappropriate response.
- Appear to be rushing the speaker and cutting off conversation.
- Fail to understand the business situation.
- Misinterpret the speaker's comments.

Do you want to take those risks? Will your co-workers and customers be impressed with your telephone skills?

### **Guidelines for Better Listening**

Here are 6 simple guidelines to improve your listening skills. Think about how you might apply each of them in your business telephone conversations.

1. Listen for understanding. Your mind can process information faster than a speaker can send it. That means you'll need to develop discipline in listening. Concentrate on important points. Summarize and repeat them in your mind as the other person speaks so that you reinforce your understanding.
2. Verify what you think you heard. Repeat or rephrase what you think you heard; then ask the speaker to verify the accuracy of your understanding.
3. Listen for expression. In a telephone conversation, you don't have the benefit of visual cues, so pay special attention to the speaker's vocal and verbal expression.
4. Notice what is not being said. Listen for omissions. Sometimes the unspoken message can be very important. Be aware of evasiveness, hesitancy or tentativeness.
5. Listen objectively. Keep an open mind during telephone conversation. Don't prejudge. Try not to guess what the speaker will say next. Control your own reactions if and when the conversation touches your emotions.
6. Stay involved in the conversation. Keep your attention focused. It's easy to let your mind stray, particularly when you don't have eye contact and face-to-face presence to keep you interested. Don't turn off your attention or let your attention wander during the call. Concentrate.

### **Questioning**

A business telephone call is a dialogue – a two-way exchange of information. When you are not listening, chances are you will either be explaining something or asking questions to obtain information.

**Questioning as a Telephone Skill.** Questioning is a systematic process that enables you to discover information.

In business telephone calls, ask questions to accomplish two goals:

1. To get the information you need.
2. To verify or confirm information you've received.

Of course, you'll ask these questions in a conversational way and not make it sound like an interrogation.

There are 2 basic types of questions, namely direct and indirect.

**Direct Questions:** Sometimes your telephone call will be designed to find out very specific pieces of information. In those instances, you need to ask a series of direct questions.

*"What date have you selected for the regional meeting?"*  
*"Will Mr. Jones be able to make his 16h00 appointment?"*  
*"Does that time suit you?"*

Direct questions are straightforward. They focus the conversation on a limited topic, and they obtain specific information. Direct questions (sometimes called closed questions) can be answered with a few words, such as 'yes' or 'no'.

**Indirect Questions:** In some telephone conversations, you need to uncover more general information, share ideas or discuss opinions. For these situations, you would ask a series of indirect questions.

*"Why have you chosen to stay with your present supplier?"*  
*"What are your goals this year?"*  
*"How is your company organized?"*  
*"When last did you have an appointment with us?"*

Indirect questions encourage general, wider-ranging responses. They open up avenues for further thought and discussion. Indirect questions (sometimes called open questions) cannot be answered with a word or two. They are designed to get the other person to talk freely, at some length, and in his or her own way.

**Using Direct and Indirect Questions:** There are two types of questions often used in business telephone conversations. When is each type most appropriate?

- Direct questions are used when trying to discover specific information, come to an agreement, or confirm information received.
- Indirect questions are used when trying to determine needs, uncover problems or understand issues or concerns.

## Guidelines for Effective Questioning

Learning how to use questions effectively takes practice and guidelines.

1. Select the appropriate questions. Plan a general line of questioning before you make the call. Ideally, you'll identify the information you need, then prepare questions to get the conversation rolling. You cannot anticipate every question, but you can make an educated guess.
2. Listen to the answers to your questions. Remember, questioning is one of the broader skills you use in a professional business conversation. Don't tie yourself too tightly to a strict line of questioning. Don't start forming your next question until you've listened to the answer to the last one. Be sure you don't answer the questions yourself.
3. Timing is important. In a telephone conversation, timing is everything. Avoid interrupting the conversational flow with a question out of context, but take advantage of conversational opportunities when they arise.
4. Continue questioning to confirm or verify information. Verifying is a special aspect of questioning. To verify, summarize what has been said (what you heard the other person say), then ask for confirmation with a question. Here are some examples:  
Summarize: *"So the appointment will be on Thursday at 14h30..."*  
Confirm: *"...is that correct?"*
5. Avoid conducting an inquisition. There is a very delicate difference between an intense question and answer telephone call and an inquisition. If you get carried away firing questions, your listener will feel as though he/she is being grilled for information. It's best to acknowledge each answer briefly or comment in a relevant way before asking another question.
6. Don't get hung up on types of questions. Although it's useful to know and use the two types of questions, don't let yourself get hung up on the types themselves. After all, it is the answer, not the question that is the most important. Remember that your telephone contact may not respond in entirely predictable ways. Don't panic if he/she comes up with a one-word answer to your best indirect question! Take note of the information and realign your questions accordingly.

### A HINT....

As you get ready to gather information over the telephone, consider constructing your line of questioning around the following 6 words :

Who? What? Where? When? How? Why?

## Speaking

The person on the other end of the telephone line cannot see you. There is no visual imagery to assist communication, so the parties in a telephone conversation must rely entirely on sound. The speaking voices are the primary expression.

In business telephone calls, your speaking voice can be an asset or a liability. We would all like to have the voices of TV or radio announcers. Despite a lack of natural talent, we can all take steps to make sure our voices become a business asset.

**What Factors Influence our Speaking Voice?** A number of variables directly affect vocal quality. There are 3 concrete variables and 2 less tangible traits.

**Pitch in the speaking voice is much like pitch in singing.** Pitch ranges for low (bass) to high (soprano). In speaking voices, people show a general preference for the middle and lower ranges of the vocal scale. Low voices are regarded as signs of authority and trust. Higher voices, on the other hand, are often regarded as signs of immaturity or lack of experience. You may make a conscious effort to adjust your vocal pitch in either direction.

**Speed is the rate at which you speak.** The range is from slow to fast, with the idea somewhere in the middle. A fast talker appears impatient or seems to be steamrolling the conversation. If you talk too fast, your telephone contact may not be able to follow you. In contrast, a slow talker may appear to be a slow thinker, as well. If you talk too slowly, your conversational partner will be tempted to cut in, supply words, or otherwise hurry you.

**Volume is the loudness of your voice.** The range is from soft to loud. Ideally, you'd want your voice in the middle of the range. What happens if you are talking too loudly or too softly? In either case, your telephone contact will find the conversation unpleasant and will be distracted by inappropriate volume.

Pitch, speed and volume are all the concrete features of the human speaking voice. Next are 2 more traits that are not quite so easy to define.

**Inflection is the modulation or change in a speaker's pitch or tone.** Inflection gives your voice its personality. It provides the emphasis, interest, or accent that helps the listener understand your message. Inflection helps you show enthusiasm, interest, concern, and all the other possible human emotions.

A voice without inflection is described as monotone. A monotone voice is often associated with someone who is bored or uninterested. That's not an impression you want to make in a business telephone call. You want to use inflections to help communicate your message.

Enunciation is the articulation or overall clarity of your speech. Garbled or indistinct speech annoys the listener. Your goal is always to speak clearly, pronouncing words correctly, and speaking distinctly. You want to avoid sounding stilted or affected, but you do want to strive for vocal clarity.

**Putting the Factors Back Together.** We've discussed the speaking voice to look at 5 important variables.

- Pitch
- Speed
- Volume
- Inflection
- Enunciation

Let's put the 5 variables into perspective. Your speaking voice reflects all of these variables. If you want to change your vocal quality, you might begin by changing one or more of these variables. Your general goal is to develop a professional, businesslike telephone voice that communicates your pleasant personality and positive attitude.

### THINK ABOUT IT... RATE YOUR OWN SKILLS

How would you rate your key telephone skills? Identify your strengths and weaknesses in listening, questioning and speaking. Read each item and circle the letter that best describes your skill level.

P=Poor      G=Good      E=Excellent			
P	G	E	1. Listening for understanding.
P	G	E	2. Interpreting what I heard.
P	G	E	3. Listening for expression.
P	G	E	4. Noticing what is not being said.
P	G	E	5. Staying attentive and involved in the telephone conversation.
P	G	E	6. Keeping an open mind during the conversation.
P	G	E	7. Verifying what I think I heard.
P	G	E	8. Formulating and using direct questions.
P	G	E	9. Formulating and using indirect questions.
P	G	E	10. Listening to the answers to my questions.
P	G	E	11. Planning a line of questioning before the call.
P	G	E	12. Using timing to my advantage in the conversation.
P	G	E	13. Speaking in a medium pitch.
P	G	E	14. Speaking at a moderate rate.
P	G	E	15. Speaking with adequate volume.
P	G	E	16. Using inflection to show interest and personality.
P	G	E	17. Speaking and enunciating clearly.



## **SECTION FOUR: BUSINESS TELEPHONE TIPS**

### **CUSTOMERS, COURTESY AND YOU**

When you answer the telephone in a business, you are interacting with a customer. Every telephone call you make at work gives you an opportunity to strengthen a customer relationship.

You also use the telephone in a business for other reasons too. After all, you may use the telephone to talk to customers at work, but you also talk to colleagues and co-workers on the phone, and they're not customers.

There are really 2 kinds of customers – external and internal. External ones are the people who call your company to buy products and services. The external customer's call demands your best telephone manners.

When you work with other people or you coordinate with other departments or divisions, you are interacting with internal customers. If a colleague calls needing data from you to prepare a report, that person is really your internal customer. Internal telephone calls deserve the same level of courtesy you'd normally use with real customers.

Telephone courtesy should become a habit. Whether you're interacting with external or internal customers, courtesy is always your best telephone strategy.

### **FOCUS ON TELEPHONE COURTESY**

Draw on your telephone experiences – both as a customer and as a businessperson – to answer the questions below. Then consider each of the related telephone tips.

1. When you place a call, how many rings do you allow before you assume the party is not going to answer?  
Tip: To be generous, you'll allow from 4 to 6 rings before you assume the person you are calling is not going to answer.
2. When the telephone rings, how quickly do you answer?  
Tip: When you receive a call, answer on the first or second ring. In business the ring of the telephone is not simply an interruption. Answering the telephone is an integral part of your job.
3. Have you ever been lost when someone tried to transfer your call?  
Tip: Call transfers are very common. Be sure you know the proper process on your system. Customers who are lost in transfer may become lost business as well.
4. When making a business call, do you like being put on hold?  
When you're on hold, have you ever felt abandoned or left hanging?

Tip: Most people don't like being on hold. Be sure you ask the party if he/she wants to hold. Then check back every 30 seconds to confirm that hold or offer to take a message. Never abandon a caller on hold.

5. Have you ever been on the telephone when the other party dropped the receiver or accidentally banged it on the desktop?

Tip: It is an unpleasant surprise. Be especially careful in handling the receiver. Your telephone partner will appreciate it.

6. How do you feel when talking on the telephone to someone who is eating or drinking during the conversation?

Tip: Don't eat, drink or chew gum during a conversation. The sounds of consumption are not always pleasant.

7. What impression do you get when the other person fumbles around looking for a pad or pencil?

Tip: You probably imagined the person was not organized or was not very business like. Since you always want to make a positive telephone impression, be ready for action.

8. When someone says he/she will call back at a specific time – but doesn't-how do you feel?

Tip: Telephone tag means two parties try to get in touch by leaving phone messages and attempting callbacks. It's become an irritating fact of business life. If you promise to call back at a certain time, make that call. Likewise, if you've promised to be available at a certain time to receive a call, be there.

9. Suppose you receive a call and are disconnected. Who takes the initiative to resume the call?

Tip: The person who made the original call makes the second call to resume an interrupted conversation. The person who received the original call should hang up immediately when the call is disrupted to enable the other party to call back.

## SECTION FIVE: HANDLING INCOMING CALLS

### ANSWERING THE TELEPHONE

Every time the telephone rings, think of it as an opportunity to do business.

#### A Prompt Answer

Your first action should be to answer the telephone promptly. If your company does not have a stated policy, assume that the sooner you answer the phone, the better. Answer by the second or third ring, at the least.

#### Identify Yourself and Offer Service

Although work situations vary, it's customary to identify your firm, yourself, or your department when you answer an incoming call. It is also an excellent idea to ask how you might help the caller. Consider these examples.

Answering your own telephone     *"Good morning; this is Janet Smith."*

Answering for the business         *"Good morning; ABSA Bank. Janet speaking."*

Answering for the Department     *"Accounting department; Janet Smith Speaking. How may I help you?"*

Answering for superior/colleague   *"Hello; this is Mr. Riley's office; Janet Smith Speaking. How may I help you?"*

### TAKING ACTION ON INCOMING CALLS

Once you've answered the call, your next steps are to identify the caller and the purpose of the call. Depending on what you find out, typically there are 4 actions in handling an incoming call.

1. Handle the call yourself (assuming the call is for you.)
2. Place the caller on hold.
3. Transfer the call.
4. Take a message.

Some companies have prescribed methods for each of these actions. In others, it's up to the individual to figure out what to do.

## Handling the Call

For business telephone calls, the safe route is the conservative one. Use the caller's title and last name (e.g. Mr. Jones, Ms. Reynolds or Dr. Perkins). Do not operate on a first name basis unless you are well acquainted with the caller and have established an informal business relationship. Always avoid slang expressions, cliches, or any form of address that might be considered offensive (e.g. honey, dude, dear, guy, man, or kid). You don't want to get the conversation off on the wrong foot. The same advice applies to closing the call. Use the traditional forms of closure such as "good-bye", rather than informal versions like "bye-bye", "so long" or "talk to you later". Typically, you'd expect the caller to make the first signs of closing the call, and you'd stay on the line until the caller has hung up.

Some callers chatter as if you had nothing better to do than visit. This puts the burden of concluding the conversation on you. Here the challenge is to wait for an opening (a breath or other pause), then jump in with a concluding remark and say good-bye.

## Placing a Caller on Hold

Sometimes you need to place the caller on hold. If the requested person is busy on another line or if you need a moment to grab a file, the hold option seems sensible. Be sure to ask if the caller wishes to hold or prefers to leave a message. Here are some examples:

*"Mrs. Browning is talking on another line. Would you care to wait, or may I have her return your call?"*

*"Bob Harris is working with another customer at the moment. Would you like to hold, or would you prefer to leave a message? I'm not sure how long he'll be, but it may take some time."*

When you put a caller on hold, remember the last time you got stuck. That way, you'll be motivated to check frequently to see if the caller wants to continue to hold or prefers to leave a message or call back. Here are some examples:

*"I'm sorry, but Mr. Jenkins is still on the other line. May I have him return your call later today?"*

*"Hello again, Mr. Smith. Ms. Venter expects to be a few minutes longer. Do you want to continue holding, or would you prefer to leave a message?"*

## Transferring Calls

Often a caller has reached you by mistake and really needs to speak to someone else. That's where call transfers become useful. Transfers are routine in business telephone situations, but too many transfers make a negative impression.

When transferring calls, always explain what you are about to do and get the caller's permission. *"Mary in the accounts payable department will be able to answer your questions, Mr. Burrows. I'd like to transfer you to her line. Is that all right with you?"*

There is always a slight risk that you'll lose the caller when you attempt to transfer. Plan ahead for this possibility. Either get the caller's name and number so you can call back, or be sure the caller has the name and number of the proper contact so he can call back if the transfer is unsuccessful. *"Mary in accounts payable is at extension 123. I'll transfer your call now."*

## Taking Messages

The office seems to be filled with pink slips-those little pink forms designed to make it easy to take telephone messages. The message form is an excellent guide for collecting the right information. A good telephone message enables you to take an appropriate business action in response to the call.

Examine the sample message form at the end of the section. The form is simple and clear. All you need to do is fill in the blanks, completely and correctly, and then be sure the right person gets the message. The basic questions, who, what, when, why, where and how apply to taking messages.

Take time to complete the form. Verify the information as you speak with the caller. Check the spelling of names and confirm the phone number and extension.

**Detailed Messages:** Messages must be complete and contain sufficient information. Always try to determine what issue, request, or need the caller has. Try to estimate the importance or urgency of the call. Your notes in a telephone message will help your co-worker prioritize callbacks and prepare intelligently for them.

## **TAKING CALLS FOR SOMEONE ELSE**

Many business people prefer handling their own incoming telephone calls, but some situations prevent them from doing so. A writer might be struggling to meet a deadline and want to avoid the interruption of telephone calls. Someone might wish to avoid certain calls and accept others while working on a complex decision. A salesperson may be out making sales calls. A clerk may be in the hospital. For a variety of reasons you may be asked to screen incoming calls for someone else.

These situations always pose a ticklish problem. What do you say to the caller? You don't want to give the impression that the person doesn't want to speak to the caller. You also don't want to give out private information. You need to be tactful and firm.

### **Screening Calls Tactfully**

Here are 2 sample dialogues. Mr. Pierce is in, but does not wish to speak to Mr. Folsom today. Which dialogue makes a more positive impression?

#### **Dialogue Sample A**

Bob: *"Good Morning. Mr. Pierce's office. Bob speaking."*  
Caller: *"I want to speak to Mr. Pierce"*  
Bob: *"Who's calling?"*  
Caller: *"It's Ray Folsom from the bakery."*  
Bob: *"Oh, Mr. Folsom, Mr. Pierce is out of the office right now."*

#### **Dialogue Sample B**

Bob: *"Good morning. Mr. Pierce's office. Bob speaking."*  
Caller: *"Hello. Is Mr. Pierce there?"*  
Bob: *"No, he's not available. May I ask who's calling?"*

If you chose sample B, you're right. It is both tactful and brief. The first sample seems as though Mr. Pierce might be in-but not for Mr. Folsom.

## WHILE YOU WERE OUT...

To: \_\_\_\_\_

From: \_\_\_\_\_

Company: \_\_\_\_\_

Contact numbers:

W / H: \_\_\_\_\_

Cel: \_\_\_\_\_

Message:

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Date : \_\_\_\_\_

Time : \_\_\_\_\_

Call taken by : \_\_\_\_\_

## **SECTION SIX: HANDLING CUSTOMER PROBLEMS AND COMPLAINTS**

### **PROBLEMS AND COMPLAINTS**

No matter what your job title or position, you likely handle customer problems or complaints over the telephone. You have internal and external customers. It's not only the telephone salesperson, order-handler, or customer-support representative who faces the challenge of troubleshooting customer complaints on the telephone. It's every person in every job.

When your manager calls to ask you about your budget overruns, or when your co-worker calls to explain a schedule conflict, you are handling a complaint or managing a problem from a customer-an internal customer. As a salesperson, service technician, or support representative, you are the first point of contact between your company and your customers. You handle complaints and manage problems for external customers on a daily basis.

### **The Challenge of Customer Satisfaction**

Handling customer problems and complaints requires a major effort. Sometimes company policy restricts our ability to satisfy legitimate customer concerns. In other cases, the customer's complaint is unwarranted. Occasionally, customers seem too emotional, almost irrational. Once in a while, the customer is just plain unpleasant. Every incoming telephone call presents a new challenge. How can you prepare to meet these challenges? Begin by thinking about the customer's expectations?

### **Customer Expectations**

Customers have expectations. Their expectations may involve you, your work, your company, or your company's products and services. On an even broader scale, customers' expectations about how they should be treated are derived from feelings about simple human dignity, social status, and business ethics. Expectations can be quite varied and numerous.

Put yourself into the customer's role. Think about your expectations for a product or service that you purchased. What happens when one of these expectations is not met? You'll either call somewhere else to buy, or if you've made the purchase, you'll call to complain.

Although your list of expectations may be completely rational, not every customer's expectations are realistic. Sometimes a customer's expectations are met initially, but later the customer changes expectations. Suppose you bought



the TV with a one-year warranty, but 2 years later you demanded that the company repair the product for free. Some customer expectations can be unreasonable or excessive, but they are still expectations.

## **Complaints and Problems**

When a customer's expectations are not met-for whatever reason-then problems arise. When that happens, the customer may call to voice dissatisfaction or concern. That's where you come in - ready to ensure that the customer's expectations are satisfied.

## **THINK ABOUT IT...HOW'S YOUR CUSTOMER AWARENESS?**

How strong is your customer awareness? Read each statement; then circle Y if you agree or N if you disagree.

- |   |   |     |  |
|---|---|-----|--|
| Y | N | 1.  | I believe that the customer is always right.   |
| Y | N | 2.  | The customer is the most important part of our business.                               |
| Y | N | 3.  | Customers always try to get something for nothing.                                     |
| Y | N | 4.  | 100% customer satisfaction is my goal.   |
| Y | N | 5.  | Customers expect me (or my company) to be perfect.                                     |
| Y | N | 6.  | Customers typically call with complaints before they have thought the problem through. |
| Y | N | 7.  | Customer problems are usually caused by the customer.                                  |
| Y | N | 8.  | Most customers expectations are reasonable.  |
| Y | N | 9.  | I become irritated when a customer is rude.  |
| Y | N | 10. | If I can't handle a rude customer, I hang up.  |
| Y | N | 11. | In every telephone call, it's me versus them.  |
| Y | N | 12. | Customers don't really mind waiting on hold.   |
| Y | N | 13. | It doesn't really matter if one or two customers are unhappy.                          |
| Y | N | 14. | Customers should understand what I am going through at work.                           |
| Y | N | 15. | Customers tend to blame me for their problems.   |

Are you ready to analyze your results? Check your responses with those given on the next page. Award yourself one point for each response that matches the answer key.

- |      |       |       |
|------|-------|-------|
| 1. Y | 6. N  | 11. N |
| 2. Y | 7. N  | 12. N |
| 3. N | 8. Y  | 13. N |
| 4. Y | 9. N  | 14. N |
| 5. N | 10. N | 15. N |

If you scored from 13 to 15 points: You've got the kind of attitude that will really be an asset in handling customer complaints and problems via the telephone.

If you scored from 11 to 12 points: Remember, every complaint or problem that you handle is an opportunity to make someone happy.

If you scored 10 or less: Develop a positive attitude toward customers. Remember that customers are only people. They're bound to exhibit faults and shortcomings, just like the rest of us.

## **A LOGICAL APPROACH TO SOLVING PROBLEMS**

Handling customer problems and complaints is a difficult job. That's why you need a logical approach, a basic step-by-step process for handling customer complaints and problems.

### **The Plan**

Here is a model for handling customer problems. This model can be used to solve customer problems via the telephone, but the approach itself could be applied to any problem-solving situation. As you read each step, assume that your job requires you to handle incoming calls from customers who have problems, concerns, or complaints.

**Step 1: Open the Call.** Your objective in opening the conversation is to set a positive tone for the interaction. Use a cheerful expression. Make your voice convey your positive attitude. When answering the telephone, include these items in your opening:

- A greeting
- Your company name or department name.
- Your name
- An offer to help the customer.

Note the following example:

*“Good morning. Edgars Customer Hotline; Cindy speaking. How may I help you?”*

The proper opening statement and a positive inflection assures the caller of your commitment to service. Your offer to help invites the caller to begin to describe the problem or complaint.

**Step 2: Identify the Problem.** At your request, the caller will launch into a description of the problem or complaint. The caller may be calm, rational and orderly – or just the opposite. The customer may be literate and well-spoken or uneducated and inarticulate. Remember, unhappy customers are dissatisfied. Some may be irritated, angry and rude. It’s your job to sift through all of those complicating emotions to identify the real problem or concern. Here’s what you can do to work through this problem-identification step.

- Use your listening skills. Listen carefully for the facts and the underlying attitude. You need to understand the customer’s real problem or concern, and you need to recognize the customer’s emotional state.
- Use your questioning skills. Question the customer to uncover details of the problem. Use your skills to confirm your understanding of the problem or complaint.
- Control your emotions. Always maintain control over your own emotions. Remember that this is a business interaction. If you become personally involved, allow yourself to feel insulted, or lose your temper, you will not last long at the job.
- Keep an open mind. Put yourself in the customer’s position. If possible, empathize with the customer’s situation.

As you work with the customer to uncover the problem or complaint, let your voice communicate your genuine interest in helping the customer.

**Step 3: Recommend an Action.** Suggest a possible solution. The solution should always be in the form of positive action. You might be able to offer the customer a refund, assist the customer in understanding the policy for returned merchandise, or explain how the product works.

When you recommend an action, let your voice show your confidence that this action will resolve the problem. Phrase the recommendation as part of a restatement of the problem as seen in the examples below.

*“Mr. Jones, I understand you are unhappy about the delay in receiving your order. If I can guarantee that the order will arrive via air freight no later than Friday, will that meet your needs?”*

*“Ms. Baker, I’m sorry our service did not meet your standards the first week. I’d like to send the crew out again today, at no charge to you, with more detailed instructions. If the work is satisfactory, would you give us a second chance?”*

**Step 4: Gain Agreement.** Once you’ve offered a solution or recommended an action, you need to gain agreement from the customer. As you read the sample action statements, notice that each one ended with a question that asks for the customer’s agreement.

If the customer agrees to your solution, you proceed to the last step in the process. If the customer does not agree, then you need to return to a previous step in the process flow. You may have an alternative action to suggest, or you may need to go back to identifying and clarifying the problem or complaint.

What happens when you cannot seem to reach any satisfactory agreement with the customer? In most companies, there will be a trouble-shooting structure that allows you to turn calls over to your supervisor or to specialized customer service representatives who can make additional concessions to the customer.

**Step 5: Close the Call.** When the customer agrees to your recommended action, you’re ready to close the call. As you close the call, be sure to:

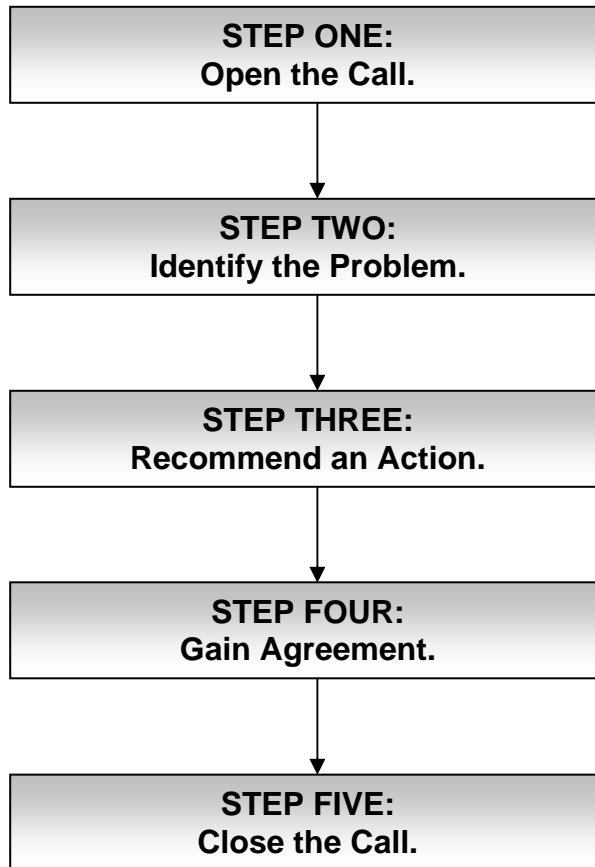
- Confirm the agreed-upon solution or action.
- Thank the customer for calling.
- Indicate willingness to help in the future.

Note the example that follows:

*“Your refund cheque will be processed immediately, Ms. Roberts. You are a valued customer here at Hip Hop clothing. If I can be of any assistance with the remainder of your order, please call me.”*

Let your voice convey your interest in the customer and your belief that you and your company can meet the customer’s needs now and in the future.

**Follow up 3 days later!!!**



### **THINK ABOUT IT...**

Within the group, discuss common complaints and problems that you receive and how you would deal with the various complaints and problems.

## DEALING WITH DIFFICULT CALLERS

The problem-solving process model will give you an excellent foundation for handling customer complaint calls. Unfortunately, there are some callers who are particularly difficult to handle. They require special strategies.

### The Rude or Angry Caller

The angry or rude caller can be very intimidating. It is difficult to stand by silently while another person spouts off a flood of insults or makes unfounded accusations. These callers are on an emotional blitz and can be difficult for anyone to handle.

Your main objective is calming the caller. Until you can get the customer to manage his/her emotions, you won't be able to make any progress. In order to calm the caller, you'll need to work especially hard on:

- Listening patiently
- Acknowledging the caller's concern.
- Trying to establish a friendly, but businesslike telephone relationship.

Your voice should be calm and comforting. You want to convey your understanding and relate to the customer's concern. The following examples will give you some ideas for defusing the caller's anger.

*"I can't blame you for being irritated, Mr. Green. Let me try to solve the problem today – once and for all."*

*"Mr. Burke, let me apologize on behalf of Bob's Auto Body. I know we agreed to match the paint colour on your fender, and we didn't get it right. We'd like to try again, at no cost to you."*

*"I can certainly understand why you're so upset. There's no excuse for our mistake. Let's work together to remedy the situation."*

Depending on how angry the caller is, it may take you more than one try to succeed in calming the caller. Perseverance is part of the job.

Once you've established a more businesslike, less emotional rapport, you can return to a logical point in your standard process model for handling the complaint.

## The Talkative Caller

Once in a while, you encounter a customer who simply loves to talk. These customers are wonderfully adept at making small talk. Those customers are using valuable time, and you have calls waiting. What will you do?

First, stifle your normal urge to respond conversationally. Don't chat with the caller just because he/she starts an informal conversation. After the normal opening pleasantries, stick to business matters as much as you can.

A second strategy is to avoid asking any indirect questions. You don't want to encourage the talkative caller to explain, explore, or ramble during the call. Instead, ask specific questions that would minimize the caller's opportunity to stray from the conversational path.

A third strategy might be to quicken your conversational pace. Limit the breathing room between statements. Move smartly through your line of questioning. Doing so will effectively reduce the caller's ability to interrupt your conversational flow. Beware of overdoing this tactic. If you begin to sound like a fast talker, you've lost your credibility.

When the caller begins to ask you conversational questions, give a very short answer and redirect his/her attention with a service-related question of your own. Here are some examples:

Caller:       *"Hello, Bob. Where were you last time I called?"*  
Bob:         *"I was on vacation last week. What can I do for you today?"*  
Caller:       *"Hey Bob! You're probably busy, but I'm going to be out your way Soon. Can you recommend a good restaurant in your town?"*  
Bob:         *"No, I usually eat at home. Is there a technical problem with your System?"*

## The Hard-to-Understand Caller

Some callers are hard to understand. They may talk too fast or too slowly for you to track their ideas. They may mumble, whisper, mispronounce, or misuse words. Any of these characteristics can make your job more difficult.

Whenever you encounter these situations, you need to address the difficulty immediately and clearly. You need to develop some tactful ways of asking callers to slow down, speed up, talk louder, or speak softer. Here are some examples you might try.

*"Mr. Brown, I am having difficulty hearing you. Please speak louder and speak directly into the mouthpiece of your telephone."*

*"I'm having trouble following your description of events, Mrs. Barrow. Would you start again and speak a little slower?"*

*"Was it the collar you didn't like or the colour, Mr. Carson?"*

## **The Uncooperative Caller**

Sometimes a customer just seems to be uncooperative. Consider these common examples.

Perhaps the caller seems passive, timid, or introverted. In that case, you have to work very hard – probing and nudging to get information from the caller.

Caller: *"I don't really know what happened."*

You: *"Why don't you start by explaining what you saw on the screen just before your computer failed."*

Perhaps the caller seems assertive because the dialogue is extremely brief and pointed. In that case, be equally assertive and professional to match the caller's tone without being pushy or abrasive.

Caller: *"I wish to speak to someone with the authority to make a decision on this repair issue today."*

You: *"I can give you a decision as soon as we confirm your product warranty registration number."*

Some callers may seem uncooperative because they are disorganized or disoriented. Draw on your listening and questioning skills to help manage the caller. These calls may require a little more time and effort.

Uncooperative callers can also have a predetermined negative opinion about you or an unrealistic expectation that you cannot accommodate. In this case, make an attempt to resolve the situation yourself, but if the customer persists, call for assistance from your supervisor.



## **SECTION SEVEN: HANDLING OUTBOUND CALLS**

### **OUTBOUND CALLS**

It's time to turn things around. So far, you've been working on handling incoming calls. Now, the topic is making outbound calls. Most outbound calls fall into one of two categories: initiating or following up on a business action.

#### **Hello, Would You?...**

Outbound calls frequently initiate a business action. For example, you might make a business telephone call to:

- Sell something
- Gather information
- Set up appointments
- Make travel arrangements
- Plan meetings and schedule events
- Provide information

#### **Hello, May I?...**

Outbound calls are also used to follow up business actions. For example, you've probably made outbound calls to:

- Assure customer satisfaction
- Provide customer service after a sale
- Explain and resolve mistakes
- Respond to requests
- Confirm information or make changes

### **HOW TO SUCCEED WITH OUTBOUND CALLS**

What's the secret of success for outbound calls? It's planning – plain and simple.

You used a clear, practical planning process when you prepared for handling customer problems and complaints. Outbound calls become more manageable if you plan them.

No matter what kind of outbound call you're making, here is an outline to use as a planning guide.

1. Smile when you pick up the receiver.
2. Greet the customer and identify yourself.
3. State the reason for your call.
4. Present your message or ask your questions.
5. Confirm understanding or gain agreement.
6. Closing for the call.

The outline should seem familiar. It's similar to some of the process models and flows you covered earlier.

## **ANSWERING MACHINES AND VOICE-MAIL SYSTEMS**

We've all had a variety of experiences with answering machines and voice-mail systems. For some, they are terrific time-savers; for others, they are a bother. When these hi-tech systems work, they are applauded. When they don't, they can do more harm than good. Telephone answering systems are here to stay, and you need to learn how to interact with them.

Sometimes the machine doesn't work quite right or doesn't allow enough time to leave a coherent message. Sometimes we're caught by surprise and forced to stumble and stammer our way through an ineffective message. The telephone-answering system is a good reason to plan your outbound calls.

### **"Please Leave a Message..."**

Here are some helpful hints:

- Plan the call. Be ready with 2 alternatives: a detailed message for systems that permit you to talk longer, and a brief message for those that don't.
- When the systems answers, listen carefully for directions. Some systems are user-friendly, but others are not.
- Always identify yourself immediately.
- Tell the date or date and time you are leaving the message.
- Give some indication of the urgency of your message.
- Speak clearly and concisely.
- If you want a callback (or you will call again), say so and give the day and time when you'd like that to occur.
- State your telephone number.

### **“When You Hear the Tone...”**

If you have an answering machine or voice-messaging system at work, prepare a welcome, offer directions, and manage your incoming voice-mail. Here are some tips:

- Learn to use your system.
- Keep your answering statement brief.
- As a rule, answer your phone when you are at your desk. Most callers hate to feel they're being screened.
- When away from your desk, update your answering statement frequently, if possible.
- If you are going away for a day or more, leave a message that refers callers to someone else who may be able to help them.
- Check your messages frequently.
- Respond to messages promptly.

## TEST

MARK EACH ITEM T (TRUE) OR F (FALSE)

- |   |   |     |   |
|---|---|-----|---|
| T | F | 1.  | The telephone is the most popular means of communication in business.   |
| T | F | 2.  | Human communication is a process whereby information is transferred from one person to another.                             |
| T | F | 3.  | Telephone skills are totally different from traditional communication skills.   |
| T | F | 4.  | A communication model usually includes a sender, a Message, a channel and a receiver.                                       |
| T | F | 5.  | If the communication model is applied to the telephone, the sender is the speaker and the receiver is the telephone itself. |
| T | F | 6.  | The 3 key skills of listening, questioning, and speaking are involved in every telephone call you make.                     |
| T | F | 7.  | A conversation implies a two-way exchange of information.   |
| T | F | 8.  | In an average telephone conversation, you should spend about 50% of your time listening.                                    |
| T | F | 9.  | Listening is the same as hearing.   |
| T | F | 10. | There are serious risks associated with a failure to listen during a business telephone call.                               |
| T | F | 11. | Listening should be an active skill, not a passive one.   |
| T | F | 12. | Direct questions are designed to obtain specific pieces of information.   |
| T | F | 13. | Indirect questions are used to uncover opinions, ideas, or general information.   |
| T | F | 14. | Direct questions are only used during telephone sales calls.  |
| T | F | 15. | During telephone conversations, it's best to avoid asking indirect questions.   |
| T | F | 16. | Your questioning skills will be needed to confirm or verify information over the telephone.                                 |
| T | F | 17. | Pitch, speed, and volume are factors that influence the speaking voice.   |
| T | F | 18. | Inflection is the modulation or change in a speaker's pitch or tone.  |
| T | F | 19. | A voice without inflection is called a monotone.  |
| T | F | 20. | Your general goal is to develop a speaking voice that is professional and businesslike on the telephone.                    |
| T | F | 21. | Every business telephone call you make is an opportunity to strengthen or weaken a customer relationship.                   |
| T | F | 22. | Internal customers are those that actually come to your store or business to make their purchases.                          |

- |   |   |     |   |
|---|---|-----|---|
| T | F | 23. | Telephone courtesy suggests that you answer on the first or second ring, but let the phone ring four to six times when you are calling someone.                     |
| T | F | 24. | It's acceptable business procedure to place and leave a caller on hold for up to 15 minutes.  |
| T | F | 25. | When taking messages for someone else, always try to determine what issue, request, or need the caller has.   |
| T | F | 26. | All customer expectations are reasonable.   |
| T | F | 27. | A customer whose expectations are not met will not be a satisfied customer.   |
| T | F | 28. | As a telephone order-taker, you are your company's first-line interface with its customers.   |
| T | F | 29. | In handling customer complaints or problems, identify the problem, recommend an action and then get the customer's agreement.                                       |
| T | F | 30. | If a customer is rude during a telephone call, you can be too.  |
| T | F | 31. | If a customer wants to chat – no matter how long – you should continue the conversation pleasantly.   |
| T | F | 32. | If a customer is hard to understand over the telephone, address difficulty immediately and clearly.   |
| T | F | 33. | If you are not able to handle a customer complaint effectively, or if the caller is not responding to your efforts, you should refer the caller to your supervisor. |
| T | F | 34. | To calm an irate caller, acknowledge the concern and apologize in a general way.  |
| T | F | 35. | Having a positive attitude is an essential part of handling customer problems and complaints over the telephone.  |

## ANSWERS

CHECK YOUR ANSWERS AND TOTAL THE CORRECT ANSWERS.

1. T	2. T	3. F	4. T
5. F	6. T	7. T	8. T
9. F	10.T	11.T	12.T
13.T	14.F	15.F	16.T
17.T	18.T	19.T	20.T
21.T	22.F	23.T	24.F
25.T	26.F	27.T	28.T
29.T	30.F	31.F	32.T
33.T	34.T	35.T	

IF YOU SCORED 36 TO 39: YOU'VE DONE A TERRIFIC JOB.

IF YOU SCORED 31 TO 35: YOU'VE MASTERED THE KEY IDEAS.

IF YOU SCORED 30 OR LESS: CONSIDER REVIEWING KEY CONTENT.