

EXCEL AT CLIENT SERVICE ~ TELEPHONE RECOMMENDATIONS

Exemplary service and prompt attention to client, consultant, and prospect needs are part of the professional impression your firm conveys. One of your most crucial roles is to make clients and prospects feel like they are the most important people you are there to help and serve. To achieve a reputation of being outstanding on the telephone is both rewarding and fun. The people who are best on the phone are those who enjoy it.

The following tips are designed to help you turn telephone problems into winning situations.

General Recommendations

 **Make call handling a top priority.** Provide phone personnel with comfortable, quiet workplaces free from distractions and background noises. You cannot expect people to concentrate their energies promoting a positive image for your organization and type, sort mail, greet visitors and so on simultaneously.

 **Your telephone manner should be *warm* at all times.** Every time you answer the phone, consider how you can make that person feel special. Warmth flows from smiles and genuine interest in the caller, what his/her needs are and how you can personally help. If you have difficulty conveying warmth, work with a mirror on your desk and practice smiling while you talk.

Every attempt should be made to answer the phone on the first, but not more than the third ring, and remember that a SMILE is clearly audible over the phone.

 **You should be professional and courteous at all times.** Be liberal with “pleases” (e.g., “May I ask who is calling, please”; “Please hold for just a moment”; etc.) Never use slang (e.g., “nope”; “uh”; “yeah”; etc.) Use phrases such as: “My pleasure,” or “Certainly,” rather than “O.K.” Treat everyone, including solicitors, graciously and with respect. It is much better to be remembered for your professionalism than the opposite.

- ☎ **Provide your name to the caller** (e.g., “Good morning, ABC Capital Management; this is Jane.”)
- ☎ Take notes during every call, and repeat and verify all key facts and agreements that you and the caller have made.
- ☎ **When a cold caller (e.g., solicitor) calls, find out what the call is regarding before you pass it on.** Consider calls from solicitors good practice. By learning to decline graciously, you will be better prepared to handle sensitive calls from clients.

Try to resolve the issue without passing the cold caller on. Take the number and information. If it sounds like a friend, check by asking, “Which company are you with?” If they reply that they are a friend, there is no need to ask what the call is regarding.

- ☎ **Return potentially unpleasant and frustrating phone calls first thing in the morning.** By getting these calls out of the way, you will not dread making them throughout the day. You will find your workday to be more productive and pleasant.
- ☎ **Irate callers need to be handled promptly.** If they aren’t, their anger will grow. Be especially sure to provide irate callers with your name. They will receive the impression that someone is genuinely interested in helping them solve their problems.
- ☎ **Prepare for phone calls by determining what you want to accomplish before the call gets under way.** This will save time on the phone and keep you focused on the objective of the call. If you will be discussing complex matters on the phone, write an outline of what you are going to say. This will help you avoid making subsequent calls to cover anything forgotten.
- ☎ **To learn how your company appears over the telephone, call your company from outside the firm.** Use the number listed in the phone book, not the one you are used to calling when you need fast action. Ask for something you know will be difficult to get. *Check the following:*
 - The number of times you are put on hold
 - The number of times you are transferred

- The number of people who say, "Gee, I'm not sure we do/have that" (or some variation)
- The number of people who tell you, in some form or another, "No, you cannot have that"
- The number of different people you have to speak to
- The number of times you have to repeat yourself

📞 Headsets and/or extra long phone cords are helpful for people who spend substantial time on the telephone. Extra long cords help you to be more invigorated and allow you to energize yourself with activity.

📞 Headsets improve your efficiency by:

- Freeing your hands so you can jot notes and reach for records.
- Reducing distracting background noises so that you can concentrate your full attention on the call.
- Limiting fatigue by improving your posture.
- Brightening your voice by letting you gesture and move around freely.

📞 Consider telephone work as one more opportunity to succeed and to help your firm excel. You will all benefit.

Answering Calls

📞 The way the phone is answered influences people's opinions of the company they are calling. The things that bother people the most on telephone calls are:

- Being put on hold without permission
- Being uninformed
- Using poor grammar
- Not identifying who is speaking
- Mangling of names, either the caller's or the answerer's company name
- Being cut off
- Being transferred too many times
- Indifference

If you happen to be having a "tired day," have others cover the phones.

The ideal answer includes three components:

1. Answer with a friendly, smiling greeting. A simple “Good morning!” when conveyed with warmth can be powerful.
2. Identify yourself and the organization. “You’ve reached ABC Capital Management. This is Cindy Jones.”
3. State your willingness to help. “How may I help you today?” (versus “Can I help you?”) You could also ask, “In what way may I be of assistance?”

☎ **Convey an attitude of helpfulness** by inserting a warm “How may I help you?” as soon as possible in your telephone exchanges. At the end of the call ask, “Is there anything else I can do to help you?”

☎ **Answer the phone within one to three rings.** If this is impossible, make the necessary changes. Increase your switchboard staff. Install direct lines so that callers can reach appropriate extensions without overburdening the switchboard.

☎ **Be sure everyone is trained to communicate clearly.** “ABC Capital Management” must always be clear and audible in the greeting, not mumbled.

☎ **Always get a caller’s name and telephone number.** Try to get as much information as you can about the nature of the call. Repeat the caller’s name once or twice, but avoid overdoing it. Give your name before asking for the caller’s. When people leave telephone messages for anyone in the office, repeat phone numbers to ensure they are correct.

☎ **Answer the phone clearly.** Sample dialog:

“Good morning/afternoon, ABC Capital Management; this is Jane.”
Is Bob there?

“May I ask who is calling, please?” OR “May I tell him who is calling?”
Donald Trump.

(OR when Bob is out of the office: “**Bob is unavailable; may I take a message?**”)

“And your company name?”
Trump Enterprises.

“May I tell Bob what this is regarding?”
I’m interested in your services.

“Thank you, Mr. Trump (or Donald if he is a client); just one moment, please.”

- ☎ **Replace “Have a nice day” with:**
- “Take care”
 - “Enjoy your day”
 - “Thanks for calling (or stopping by)”
 - “Make it a *great* day”
 - “I’m glad you called”
 - “Thank you for doing business with us”

- ☎ **Conclude all calls with a verification of key points covered.** If agreements have been made, restate them to assure there are no misunderstandings later.

Putting Callers on Hold

Always ask before putting a caller on hold ~ and check back with them frequently!

- ☎ **Never put a person on hold until you have asked permission to do so, and wait for an answer.** When asking permission to put someone on hold, give the caller the name of the person for whom he or she will be holding. Example: “Would you mind holding? I’ll have Pat Smith in accounting pick up to answer your question.” Most people will hang up after about 40 seconds if they are paying for the call.

- ☎ **Never put callers on hold indefinitely.** When you must ask callers to hold, offer them a choice. “That information will take a few minutes to get. Would you like to hold, or would you prefer I call you back?” When your callers are on hold, check back with them frequently. Everyone appreciates a little reassurance while they are in - (as George Carlin puts it) - purgatory. “Mr. Thomas, I haven’t forgotten you. I’ll have that information in a minute.” When returning to the call, begin by thanking the caller for holding.

- ☎ **Avoid subjecting callers to a two- or three-minute litany of recorded messages/music.** Intermittently, provide a live person with whom the person can speak. “Do you still want to hold, or would you like me to convey your message?”

Voice Mail/Answering Machines

- ☎ **Make your voice mail greeting more than generic.** Identify yourself, and when possible, provide information about when you will be available.
- ☎ **When leaving a message on voice mail, speak slowly and clearly.** Enunciate numbers slowly and clearly. Put a smile in your voice. Pretend that the person with whom you are speaking can see you.
- ☎ **When you leave a message on an answering machine, give your phone number twice.** Network noise can wipe out a number, and you will wonder why your call was not returned.

Transferring Calls

- ☎ **Confirm all transfers.** Getting the person on the phone, informing him/her of the nature of the call and then connecting the caller requires a few extra seconds, but it is time invested, not wasted.
- ☎ **Instead of saying, “I’m going to transfer you to...” or “You’ll have to talk to...” - consider using language to this effect:** “Martha Andrews is the real expert on that, and she’ll be glad to help you. Would you like me to transfer you?” or “Would you like me to have her call you?” When calls are transferred in this way, and references to others in your firm are phrased in positive terms, the team spirit message comes across loud and clear.
- ☎ **Never transfer angry callers just to get rid of them.** If they have to be transferred, make sure they are transferred to someone who can solve their problems. Tell callers the name and number of the person to whom they are being transferred. That way, if a call gets lost, the caller will know how to get back in touch.

***When you receive a complaint, you “own” it.
Solve the problem; do not pass the buck.***

Ways to Avoid Telephone Tag

- ☎ **Try returning phone calls about 10 minutes before noon and 10 minutes before 5:00 p.m.** Most people are in their offices at those times.
- ☎ **When people you call are not there, do not just ask to have them return your call.** Ask *when* is the best time to reach them. Provide the same information about you or the person they are trying to reach.
- ☎ **If you leave a message, make it clear when you will be available.** If you are going to be away from your phone for the next few hours, make sure that information is included with your message.
- ☎ **If you just need some information, leave a message that suggests what to do if you are not in when they call back.** You can say, “If I’m not in, please give the information to Pat.” Then let Pat know who may be calling and what they may need.

Telephone Prospecting

- ☎ **Remember, a prospect and/or client’s first impression of your company is based on phone contact.** What you say and how you say it should be one of your key concerns. Here are eight basics to follow:
 1. **Be prepared.** Know what you want to say before you make the call.
 2. **Be up front.** Introduce yourself and your company, and state the reason for your call and how you got the customer’s name.
 3. **Be friendly.** Use the personal touch, mentioning the prospect/client’s name.
 4. **Be honest.** One false statement subjects your whole conversation to question.
 5. **Be clear.** Information should always be logical and easy to understand.
 6. **Be non-aggressive.** Avoid the hard sell. Give clients a chance to take in what you are saying.
 7. **Be polite.** Be courteous, even when rejected.
 8. **Be concise.** Never go on and on. Once the sale is made, end the conversation quickly and politely.

Enjoy being the “Best on the Phone.”