**⚫ UNIT 17: Deal with customers by telephone**

**Y**

**our verbal skills are essential if you want to provide good customer service. On the telephone, what you say and the way in which you say it are all the customer has to go on in forming a positive impression of both you and your organisation, so it’s essential that your phone manner is up to scratch.**

**SOME BASIC TELEPHONE RULES**

* Whether they’re calling you or you’re calling them, introduce yourself with both your own name and that of your organisation and BE FRIENDLY and POLITE!
* LISTEN! As with any form of customer service it’s essential that you listen to what they have to say before you can decide the best way to proceed and what steps you need to take in dealing with their enquiry.
* Have a notebook with you so that you can jot down the key points of your conversation. Its often easy to forget a particular detail especially if the customer is raising a number of issues.
* Concentrate and avoid distractions around you.
* Try to answer all calls promptly-there is nothing worse for a customer than having to wait on the phone for a reply. Most organisations try to answer all telephone enquiries within 2 rings.
* Make sure you can hear clearly-turn down any background noise if possible.
* Be efficient but friendly.
* Be as helpful as you can be but recognise the limits of your responsibility. If you can’t personally help with their enquiry, find out who can. Either re-connect them to a colleague who can help, or ensure that you call them back as quickly as you can with the information they need.

**Hello, this is Customer Service, how may I help you today?**

* Be aware of both your own and the customers accent. Speak clearly and slowly if necessary. Make sure you fully understand them, if you don’t clarify what you think they have said-NEVER GUESS!



* Smile on the phone-they might not be able to see you but smiling helps to open your mouth wider so that you speak more clearly as well as sounding more friendly.
* Breathe deeply-you will sound more relaxed and confident.
* Check with your line manager to find out if there are any guidelines in place for the way in which you handle telephone calls from customers. You may be required to answer the phone with a set phrase.
* If you need to put your customer on hold, ask them first to make sure that they don’t mind ie “Would you mind if I put you on a hold for a moment while I check?” If they’re on hold check back with them at least every 20 seconds. Customers begin to get irritated after 17 seconds of inactivity.
* Do your best to ensure that the call is a positive experience for your customer. Thank them for calling and briefly remind them of any actions you are subsequently planning to take as a result of the call.
* If you’re taking down their number-always read it back to them to confirm it’s right.

**STRICT TELEPHONE NO-NO’s!**

* Never say “can you call back later” – always take their name and number and tell them YOU will get back to them as soon as possible.
* Never say that there’s no one able to deal with their enquiry on the premises.
* Never say “I don’t know who you need to speak to” - FIND OUT!
* If you’re dealing with a complaint, never say : “We’ve had complaints about that before”. Treat every complaint seriously as if it’s your first experience.

**HOW TO TAKE A MESSAGE**

Taking a message may seem like a straight forward thing to do but its amazing how many people get it wrong; and a messed up message is a lost customer!

All customers expect any message they leave to be taken professionally, passed on to the right person and followed up as quickly as possible. Any message you take must include :

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| **1.** Name of caller.  **2.** The name of their organisation if they have one.  **3.** Their contact details –both mobile and landline numbers. You should always read these back to the customer and make sure they’re correct.  **4.** The date and time of the call. | **5.** Who they want to talk to.  **6.** Brief details of the message.  **7.** Details of any action requested or required.  **8.** Your name so that colleagues know who to speak to if they need further details. |

Taking a message doesn’t end there... it is essential that you make sure the right person gets it. If possible give it to them personally. If you then find out that they are unavailable or absent make it your responsibility to follow up the message. Find someone else who can deal with the issue, or call the customer back and explain the situation re-assuring them that their enquiry will be dealt with as soon as possible.

Any message you take remains your responsibility until you KNOW it has been dealt with properly.

**WHAT TO DO WHEN CALLS GET DIFFICULT...**

Occasionally you may receive an abusive call from a customer. These sort of calls only usually occur if the customer has made a complaint which has subsequently been handled badly and remains unresolved.

In this situation, it’s up to you to make amends and ensure that you do all you can to appease the customer and improve your organisation’s reputation. When dealing with abusive or angry customers try to :

* Listen to them and establish the fact before you take any action.
* Never interrupt them, this will make the customer angrier. They need to express their anger or dissatisfaction before they can take on any resolutions from you.
* Never be tempted to argue back.
* However angry they get, try to stay positive. Acknowledge their complaint before trying to resolve it.
* Discuss possible solutions with the customer so that they feel empowered.
* Try to remain objective-remember they are not really angry with you – just at the situation.
* If things get very heated you may need to pass the caller on to a supervisor or get someone to call them back.
* Talk to your line manager and find out if your organisation has a specific set of procedures that you should follow.

**UNIT 17 Assessment Activities**

**This unit is about the skills and competences you need when dealing with your customer by**

**telephone.**

**Customer satisfaction** in this situation depends on good feelings about the way the transaction has been handled as well as the features and benefits of the services or products that are offered to the customer.

**Key words and phrases for this unit:**

• operate telephone system

• speaking

• listening

• planning

• selecting information

• recording information

• selecting amongst options

• identifying benefits and drawbacks

• taking messages

While verbal communication is important, your focus on your customer and the rapport that is formed also depends on your skills with the telephone system and any information you are accessing whilst on the telephone to your customer.

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| **⮛ START HERE ⮛** |

1. Why is it important to smile when you’re on the telephone? *17.ku.b*

2. Give 3 examples of your organisation’s procedures and guidelines about what you say to telephone customers. *17.ku.e*

3. List all the details you need, when taking a telephone message for a colleague. *17.ku.f*

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| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |
| Other |  |

4. What procedure should you follow when you need to put a customer on hold? *17.ku.h*

5. On modern telephone systems sound/s are easily picked up, therefore why is it important to put the customer on hold when not talking to them directly? *17.ku.i*

**6.** How should you deal with an abusive call? *17.ku.j*

7. Explain the main features involved in operating your organisation’s phone system. *17.ku.g,d*

8. Explain the importance and give an example of when you have had to use these 2 basic telephone rules? *17.ku.a,c*

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| Speaking clearly and slowly |
| Adapting your speech, language or accent |

The knowledge and understanding from unit 17 has been satisfactorily completed

Assessor’s Name: Signature:

Learner’s Name: Signature: Signature:

Date:

Assessor Feedback:

**Below are the standards for Unit 17.**

**Working with your assessor you will need to provide evidence that you are competent in each standard.**

***UNIT 17*** *Customer Service Standards*

***When you are dealing with customers by telephone you must consistently:***

*17.p1.a) operate the telephone equipment efficiently and effectively*

*17.p1.b) keep your customer regularly informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time*

*17.p1.c speak clearly and slowly to allow for the possibility that reception on the telephone line may not be perfect*

*17.p1.d) adapt your speech to meet the individual needs of your customer*

*17.p1.e) control the length of the conversation if the call is costing your customer money*

*17.p1.f) ensure that promises to call back are kept*

*17.p2.a) anticipate your customer’s expectations and assemble all the information you might need*

*before your conversation with your customer*

*17.p2.b) plan the opening part of your conversation with your customer and anticipate their possible*

*responses*

*17.p2.c) plan the objective of your call and the way in which you expect the call to end*

*17.p2.d) open the conversation positively and establish a rapport with your customer*

*17.p2.e) ensure that your customer is aware of the purpose of your call as early as possible*

*17.p2.f) respond positively to queries and objections from your customer*

*17.p2.g) summarise the outcome of the call and any actions that you or your customer will take as a*

*result*

*17.p2.h) listen carefully when collecting information from your customer so that you do not make*

*mistakes or have to keep repeating the question*

*17.p3.a) greet your customer following your organisation’s guidelines*

*17.p3.b) listen closely to your customer to identify their precise reason for calling and what they are*

*seeking as the outcome of the call*

*17.p3.c) identify all the options you have for responding to your customer, weigh up the benefits and*

*drawbacks of each*

*17.p3.d) choose the option that is most likely to lead to customer satisfaction within the service offer*

*17.p3.e) summarise the outcome of the call and any actions that you or your customer will take as a*

*result*

*17.p3.f) select the appropriate information you need to record and store following your*

*organisation’s guidelines*

*17.p3.g) take a clear message for a colleague if you are unable to deal with some aspect of your*

*customer’s expectations*

*17.p3.h) put your customer on hold and ensure you cannot be heard if you are discussing action with*

*others or calling a colleague*

*your organisation does and the types of customers it has*

***People competent at dealing with customers on the telephone know and understand:***

*17.ku.a) the importance of speaking clearly and slowly when dealing with customers by telephone*

*17.ku.b) the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone*

*17.ku.c) the importance of adapting your speech to meet the needs of customers who may find your language or accent hard to understand*

*17.ku.d) your organisation’s guidelines and procedures for the use of telephone equipment*

*17.ku.e) your organisation’s guidelines and procedures for what should be said during telephone conversations with customers*

*17.ku.f) what details should be included if taking a message for a colleague*

*17.ku.g) how to operate the organisation’s telephone equipment*

*17.ku.h) the importance of keeping your customer informed if they are on hold during a call*

*17.ku.i) the importance of not talking over an open telephone*

*17.ku.j) your organisation’s guidelines for handling abusive calls*

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**On-programme administration checklist**

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| **Activity to be completed at the end of this unit** | **Assessor’s initials** |
| 1) Complete Action/Review Plan with learner |  |
| 2) Forward copy of assessment plan/review to Administration |  |
| 3) Update Skillwise |  |

All administration for the end of Unit 17 is complete

Signed…………………………………………. Date…………………