

Speaking with Customers

Basic Rules CIO NSW Trains

1. Listen

First and foremost, truly listen to the person on the other end of the receiver. Take note of not only their words, but also how they are speaking. Are they having difficulty speaking English? Do they sound angry or frustrated? Is there panic in their words? Take deep breaths and do your best to remain calm. If you're calm, your calmness will more than likely affect the caller as well.

Listen to what the caller is telling you. Allow the caller to vent. Don't make assumptions nor attempt to correct the caller. Do your best to get a good perspective of what has caused the caller to place an emergency call.

2. Communicate

After callers vent or voice their concerns, they will be more willing to listen to what you have to say. Do your best to communicate honestly and sincerely, asking questions to verify your understanding of the situation. If the caller attempts to argue or intimidate, remember to stay calm and listen.

It's also important to keep in mind that the caller was already upset before the call, so do not react personally. Instead, ask what you can do to help further or offer what options you have to resolve the case. Use an empathetic and caring tone of voice when communicating with the caller. In the caller's current state, they need to feel as if they are being heard and that their concerns are a priority.

3. Resolve

As a call handler, you should already have resolution options available for callers. Do you forward the caller to someone on call? Do you take a message? In the case of an emergency call, the best option — if you are unable to resolve it yourself — is to get another person on the phone that can. Do not "pass the buck." Instead, stay on the line to make sure the caller is working with someone who can truly help them.

State specifically what it is that you are going to do to resolve the call for the customer or client. Let them know exactly what you can do, what you can't do and what they should expect. Once the caller understands that they are in your competent hands, they will more than likely relax. Use phrased questions like:

- "Does that work for you?"
- "Am I making sense?"
- "Are you okay with that?"

Listen again and take note if the caller still feels unsettled. Again, make sure you are listening, communicating effectively and offering options to help the caller feel satisfied that you have done all that you can.

Phone Etiquette

1. Answer the call within three rings.
2. Immediately introduce yourself.
3. Speak clearly.
4. Only use speakerphone when necessary.
5. Actively listen and take notes.
6. Use proper language.
7. Remain cheerful.
8. Ask before putting someone on hold or transferring a call.
9. Be honest if you don't know the answer.
10. Be mindful of your volume.
11. Check for and respond to voicemails.

1. Answer a call within three rings.

If your position entails always being available to callers, you should actually be available. That means staying focused and answering calls immediately. The last thing you want to do is keep a customer waiting after a string of endless ringing or send them to voicemail when you should've been able and ready to reply.

As long as you're alert and at your phone at all times — excluding breaks — this rule should be fairly simple to follow. However, we recommend responding within three rings in order to give yourself enough time to get in the zone and prepare for the call. Picking up the phone right away might leave you flustered.

2. Immediately introduce yourself.

Upon picking up the phone, you should confirm with the person whom they have called. In personal calls, it's sufficient to begin with a "Hello?" and let the caller introduce themselves first. However, you want to allow the caller to know if they've hit a wrong number, as well as whom they are speaking with.

Practice answer the phone with, "Hi, this is [Your first name] from [Your company]. How can I help you?" Your customer will be met with warmth, which will encourage a positive start to your call. And, if it ends up being an exasperated college student trying to order pizza, they'll at least appreciate your friendliness.

3. Speak clearly.

Phone calls, while a great option for those who detest in-person interaction, do require very strong communication skills. For one, the person on the other end of the line can only judge you based on your voice, since they don't get to identify your body language and — hopefully — kind smile.

You always want to speak as clearly as possible. Project your voice without shouting. You want to be heard and avoid having to repeat yourself. A strong, confident voice can make a customer trust you and your support more. In case of bad cell service or any inability to hear or be heard, immediately ask to hang up and call back.

4. Only use speakerphone when necessary.

We all know the trials of speakerphone. It's easier for you because you can use your hands to multitask. However, for the other caller, it's like trying to hear one voice through a honking crowd of taxis in Manhattan — impossible and frustrating.

Give your customers your full attention and avoid the speakerphone. This will make it easier for both parties to be heard, and it will ensure that you're actually paying attention to them. You may need to use speakerphone at rare occasions, such as when it's a conference call or when you're trying to troubleshoot on the phone. While speakerphone may be appropriate at these times, it's always better to use a headset to remain hands-free.

5. Actively listen and take notes.

Speaking of paying attention to your customers, it's essential that you're actively listening to them throughout the conversation. Actively listening means hearing everything they have to say and basing your response on their comments, rather than using a prescribed script. This proves to your customers that you're present and are empathetic to their inconveniences.

It's helpful to take notes during support calls. You'll want to file a record post-conversation, and notes will be immensely helpful. It also ensures that, during long-winded explanations from customers, you can jot down the main points and jump into problem-solving without requiring them to repeat.

6. Use proper language.

A key difference between professional and personal phone calls is obvious — the language. It might be acceptable to use slang and to swear when talking on the phone with your friends, but this kind of language can cause you to lose a customer for life.

Always be mindful and respectful when on the phone. You never know what customers might be offended by something you say, so it's best to use formal language. It's okay to throw in humour if appropriate, but never crack a joke that could upset a customer.

7. Remain cheerful.

You never know when a customer is having a bad day. When someone is rude to you on the phone, your immediate reaction may be to put them in your place. First, though, take a moment to step into their shoes and recognize why they're so upset.

The point is to always remain positive and friendly, especially in the face of negativity. Your optimistic outlook may be enough to turn a failing phone call right around. Remind yourself that the last thing your customer probably wanted was to spend their afternoon on the phone with customer support. So, make that call the best it can be, and it may create a loyal, lifetime customer.

8. Ask before putting someone on hold or transferring a call.

There's often nothing more infuriating than being put on hold. After waiting on hold for ten or fifteen minutes to speak with a real-life human being, you finally get to explain your problem. Then, you're immediately put back on hold and then transferred to someone else to whom you must re-explain the whole problem. Talk about exhausting.

However, if you must put a customer on hold or transfer their call, always ask for their permission first. Explain why it's necessary to do so and reassure them that you — or another employee — are going to get their problem solved swiftly. By keeping your customer in the loop, they'll be less inclined to complain about a long wait time.

9. Be honest if you don't know the answer.

You might need to put a customer on hold or transfer their call if the dreaded occurs — you don't know the solution. Perhaps you've tried everything you can or simply have no idea what they're talking about. Don't panic; customer support representatives are humans, too, and it's okay not to be the omniscient voice of reason.

It's best to admit when you don't know something, rather than making excuses or giving false solutions. However, tell them that you're going to do everything you can to find an answer and get back to them momentarily, or find a co-worker who does know the answer. Customers don't typically expect you to have all the solutions at hand, but they will expect you to be transparent.

10. Be mindful of your volume.

You may be so focused on your phone call with a customer that you're barely paying attention to your present setting. When working in a call centre, things can get pretty loud. You always want to be mindful of your volume and ensure that you're not disrupting the ability of your co-workers to speak to customers and get their work done.

If you are on a call that requires you to speak louder due to a bad connection or a hard-of-hearing customer, simply step out of the room and speak with them separately. Your customers are always your main concern, but you don't want to inhibit the work ethic of others in your workplace.

11. Check for and respond to voicemails.

It's quite possible that a customer might reach out to you when you're on a break or after you've left work for the day. If it's possible for you to receive voicemails, make sure you're always checking for them. It's easy for a voicemail to slip under the radar, but the customer won't easily forget.

Start and end each day by checking your voicemail. It takes just a few minutes and can avoid a lost customer support request. Your customers will appreciate your prompt response, and you can get on to doing what you do best — providing knowledgeable and friendly support.

These tips should provide you and your team with basic guidelines for phone etiquette and, if executed properly, your company should see significant improvement in customer experience.

However, there will be some interactions where these actions may not be enough to defuse the situation. Some customer interactions will require your team to take special measures to ensure you're meeting the customer's immediate and long-term needs. In the next section, we'll break down a few of these scenarios and what you can do to resolve them.

Proper Hold Procedures

Nobody enjoys being on hold, but sometimes it is unavoidable. Here are some tips on how to properly place someone on hold and still create a good customer experience.

- Ask the caller if it is okay to place them on hold and wait for them to say it's okay
- Give them the choice to be called back or if they prefer to stay on hold if the solution is going to take a while
- Check back in every 30 seconds or so with the caller on hold
- Always thank the caller for being patient

Rules When Transferring a Call

Transferring a call properly is especially important. Improperly transferring a call can waste customers' time making them more irritated than they were at the beginning of the call.

- Inform the caller as to why they are being transferred
- Explain why it is in their best interest to be transferred
- Check to make sure the person/department is able to take the call before completing the transfer
 - If the call cannot be transferred get all of the caller's information and inform them that someone will give them a call at their earliest convenience
 - If the call can be transferred make sure the new department/person has the caller's name, request, and any other helpful information they might need to assess the issue
- Consider a policy where your reps stay on the call after they transfer it to a technician so they can see how the issue was resolved. This increases the likelihood that they will be able to handle the call on the first touch when the same or similar case comes up again.