

# Phone Customer Service — Quick Playbook

A practical guide to help new agents stay calm, sound confident, and resolve calls effectively.

Your success formula	What we evaluate
Clarity + Empathy + Ownership + Next step + Close the loop.	Greeting • Verification • Listening • De-escalation • Resolution • Closing

## 1) The 6-step call flow

- **Open:** greet + name + purpose (set a calm tone).
- **Verify:** confirm identity / account (privacy first).
- **Understand:** ask 2–3 focused questions; repeat back the issue.
- **Empathize + Own:** acknowledge feelings and take responsibility for next steps.
- **Resolve:** propose options; confirm what the customer chooses; do it.
- **Close:** summarize + next step + time expectation + friendly goodbye.

## 2) Micro-scripts (use these phrases)

Greeting	"Hi, this is ____ from _____. How can I help today?"
Empathy	"I understand how frustrating that is. I'm here with you and we'll fix it."
Clarify	"Just to make sure I got it: you're seeing ____ since _____. Is that correct?"
Ownership	"Here's what I can do right now: _____. Then we'll _____. "
Hold	"I'm going to check this for you. It'll take about 1–2 minutes. Is that okay?"
Transfer	"To resolve this faster, I'll connect you to _____. I'll stay until it's handed over."
Close	"We did _____. Next step is _____. You should see it by _____. Anything else I can help with?"

## 3) De-escalation when the customer is upset

- **Lower your pace:** slow down; keep sentences short.
- **Name the emotion:** "I hear you — this is really annoying."
- **Ask permission:** "Can I ask one quick question to fix this?"
- **Offer two options:** "We can do A now, or B within 24h."
- **Boundary** (if needed): "I want to help, and I can do that if we keep the language respectful."

# Practice + Self-check

After you read the playbook, use this to prepare before training calls.

## A) 10-point self-check (what the system can score)

<b>Opening</b>	Greeting, name, calm tone, clear intent
<b>Verification</b>	Asked for required details before sharing account info
<b>Active listening</b>	Let the customer finish + reflected the issue back
<b>Empathy</b>	Acknowledged feelings without blaming
<b>Ownership</b>	Said what you will do next, not what others should do
<b>Clarity</b>	Short sentences, no jargon, structured explanation
<b>Control</b>	Asked focused questions, kept the call on track
<b>Solution</b>	Provided options + confirmed the choice
<b>Expectation</b>	Gave timeframe / next step and what the customer will see
<b>Closing</b>	Summary + “Anything else?” + polite goodbye

## B) Mini-drills (5 minutes each)

- **One-sentence summary:** Explain the issue back in one clear sentence.
- **Two options:** Offer two solutions with a timeframe for each.
- **Close the loop:** End with a crisp summary + next step + confirmation question.

## C) Example: handling an unexpected charge

**Agent:** Hi, this is Dana from Support. How can I help today?

**Customer:** I see an unexpected charge on my account.

**Agent:** I understand — that's stressful. I'll check it with you now. Before we look at billing details, can you confirm the email on the account?

**Agent:** Thanks. I see the charge on Jan 12. Was this related to \_\_\_\_? If not, we have two options: (1) dispute it now, or (2) freeze the payment method and investigate within 24 hours. Which is better for you?

**Agent:** Great. I submitted the dispute and you'll receive an email confirmation in the next 5 minutes. We'll update you within 24 hours. Anything else I can help with?

Tip: speak slower than you think, and always end with a summary + next step.