

Phone Customer Service — Quick Playbook

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

Your success formula

Clarity + Empathy + Ownership + Next step +
Close the loop.

What we evaluate

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)

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