

Telephone Skills



Freightliner LLC

The material within the *Telephone Skills* module is for Freightliner LLC instructional purposes only.

Reference to an "authorized" dealer signifies a dealer under contract with Freightliner LLC via signed dealer agreement.

Introduction

About the Telephone Skills Course



This course is about using the telephone in ways that help maintain and grow your business.

Effective use of the telephone is more than simply “being nice” to callers. While basic courtesy is important, successful businesses view the phone as a strategic tool that can help solve problems and resolve issues, and develop more and more business. This course describes the things such businesses do to make phone usage an important part of their business growth.

- Successful businesses understand *why* strong telephone skills are so critical to them. So, the first section of this course will detail some ideas about ways to differentiate your business from your competitors, and how the phone can help.
- There are steps to take before the phone ever rings. This course will deal with some of the techniques and processes that can help create a solid phone system, as well as ways to motivate employees to use it properly.
- Then, numerous ways to use the phone effectively, both for incoming and outgoing calls, will be described. This includes handling different types of calls and proper ways to put callers on hold and to transfer calls. Knowing when to take more control of a conversation and how to do so will be covered, as well as the actions that should be taken after the call is completed.
- Finally, some tips on the use of current telephone technology will be explored.

The overall purpose of this course is to provide maximum customer service through the use of the telephone.

Who Can Benefit From This Course?

The intended audience for this course includes Parts Counterpeople and Outside Parts Salespeople. Each of these groups will find all segments of the course useful. But certain elements of this course might be of more specific interest:

- Parts Counterpeople are a front-line connection between the dealership and its retail parts customers. They will have a direct interest in the course material that covers incoming calls.
- Outside Parts Salespeople often use the phone “on the go,” and commonly make calls to customers. They will find the sections on outgoing calls and using telephone technology especially helpful.
- Parts Managers are also encouraged to review this module (although it is not required for Professional Level Certification).

The Learning Objectives



At the end of this course, you will be able to:

- Describe why and how the telephone can be an integral part of the success of your business.
- Explain the ways to set up an effective telephone system.
- Describe and use appropriate behaviors and methods for handling incoming calls and making outgoing calls.
- List appropriate actions to take following a telephone call.
- Describe the proper use of various telephone technologies.

How You Will Learn

The primary method of learning will be by reading this course material. In addition, you will explore examples provided and consider some of your personal experiences to put the written material in a context most useful to you. There will be exercises, and the final Certification Test.

No course can cover all the skills, tips, and techniques associated with telephone skills. So, when you have completed the course, feel free to talk to others in your dealership who have also done so, or to people who you think demonstrate great telephone skills. Ask them what they do to make their telephone use successful, and adopt those things that work for you.

The Importance of Effective Telephone Skills

Sometimes, simple things can be the hardest to do. They might be simple to comprehend. They might be simple in a practice scenario. But they often require that we change a behavior that we've used for years. And they require that we remember and use the new behavior or skill when we're least likely to do so, for example when an angry customer is on the other end of the line. At times like that, new things can be hard to do, regardless of how simple they seem.

New skills are generally used in difficult situations only after they have become *instinctive*. An instinctive skill is one we use without very much conscious thought, like driving a car. Generally, new skills, such as a golf swing, require practice to become instinctive. Practicing the skills of this course after its completion is highly recommended for that reason. But making the effort to practice a new skill requires some motivation to do so—a belief that there is a relevance to the skill that makes practicing it a worthwhile use of our time. It can be especially difficult to be motivated to practice a new skill that replaces one we're already comfortable with. That is especially true for a seemingly simple skill like using the telephone. After all, we do it every day, and have been doing so for years.

Only skills valued as important are likely to be implemented and practiced. So this section of the course will explore why effective phone skills are so important to your business.



How Long Do You Get?

How long do you get to make a good first impression on the telephone?

- a) 4–6 seconds
- b) 30–45 seconds
- c) 1–2 minutes

a) 4-6 seconds

Customer Expectations

Whenever a customer interacts with your business, whether face-to-face or by telephone, that customer has personal expectations for that transaction. They exist even if the customer does not or cannot articulate them. For example, your expectation at a restaurant might be:

- *To receive the food I ordered in a reasonable time frame, and at a quality that matches its price.*

These expectations exist even if you haven't given them any thought. For example, you expect that you'll get your food quickly when you're at a fast-food restaurant. You also expect the quality of the food to be OK, but you know it won't match that of a higher-price, sit-down restaurant. And you probably don't give much conscious thought to either expectation.

As the service provider at your dealership, the person with whom the calling customer is interacting, you have two things to do:

- You must understand what the customer's expectations are. If the customer isn't clear about them, you must find them out. Phone skills include ways to do so. As a part of this step, you also need to make *your* expectation of the call the same as the customer's expectation of the call. For example, you may have the "expectation" that the customer get off the phone quickly, because you're late for a dinner date with your spouse. Successful telephone users put their expectations aside and focus on those of the customer.
- You must find ways to *exceed*, not just meet, the expectations of the customer. Let's look at why that is important.



If the customer's expectations are *not* met, three negative things will likely happen. First, the customer will go to a competitor, depriving you of his or her business. Second, the customer will tell a significant number of people about the bad experience at your dealership, depriving you of their business. And third, based on experience, the customer is *not* likely to openly complain to you; they will just go elsewhere. So, you're deprived of the chance to understand and then correct the problem.



If the customer's expectations are *met*, it will usually go unnoticed. After all, the customer got what he or she *expected*. While this level of service may seem enough, unfortunately most of your competitors can meet your customer's basic expectations also, and a small price adjustment, or other simple change, may result in your customers moving to them.



Unexpectedly delighting your customers by *exceeding* their expectations makes your business stand apart from your competitors. Your customers will notice, and come back over and over again. Think about the restaurant example again:

- *I got the food I ordered in a reasonable time frame, and its quality was good for the price I paid. But, in addition, there were six specials, a really friendly waiter, free coffee refills, and they even wrote, "Thank you" on the check!*

Exceeding customer expectations is what this course is all about. But how do you do that without "giving away" the parts or offering free installation? The answer is in the area of **customer service**, and specifically in this course, customer service on the telephone.

I Didn't Notice!

Service that is **not** what the customer expected is noticed, whether the service is better than expected or worse than expected. Unfortunately, service that just *is* what the customer expected is invisible. When asked why they come to your dealership, customers whose needs are just "met" likely will not be sure, because you haven't distinguished your service compared to your competitors.

Primary Business Service versus Customer Service

What Is “Primary Business Service?”

A **primary business service** is a primary reason for which an organization exists. For a Parts Counterperson, one primary business service is providing the correct part when it is requested. The primary business services of an Outside Parts Salesperson might include dealing with inventory issues of Target Customers. The telephone is often used to provide primary business services.

The example of the Parts Counterperson and the primary business service of providing a part can be used to illustrate a simple fact about meeting customer expectations.

Absolutely perfect provision of a primary business service to a customer can only meet the expectations of the customer. It can never exceed them!

Providing Primary Business Services

Does Not Meet
Expectations

Meets
Expectations

Exceeds
Expectations

The best primary business service you can provide only gets you halfway. Why? Because the customer's expectations are that you will correctly provide the part requested! So no matter how well you do so, you'll only meet their expectations.

Sometimes, providing perfect primary business service isn't enough to even *meet* the customer's expectations. Consider the following telephone call. The phone rings...

Counterperson: “Parts.”

Customer: “I’m looking for a 21SI alternator. Do you sell those?”

Counterperson: “Yeah.”

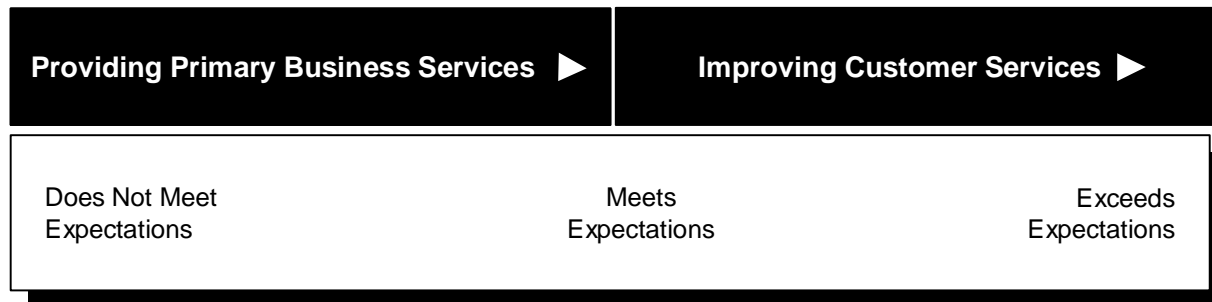
Customer: “Uh, do you have one in stock?”

Counterperson: “Don’t know. I’d have to look.”

This conversation may ultimately result in the customer getting the part he wants. And that might meet his needs. But it may also cause the customer to conclude that other essential expectations of courtesy and support haven't been met. This customer may go elsewhere next time.

What About Customer Service?

The only way to exceed customer expectations is to improve the way that the primary business service is provided, through effective customer service.



Let's look at the phone call we saw earlier, with the Parts Counterperson showing improved telephone customer service this time. The phone rings again...

Counterperson: "Hello, this is Freightliner Parts. My name is John. How may I help you?"

Customer: "Hi. I'm looking for a 21SI alternator. Do you sell those?"

Counterperson: "We sure do. Let me check if I've got one in inventory. It will take about 30 seconds. Would you like to hold?"

Customer: "Sure"

Counterperson: [pause] "Hi, I've got one. Shall I set it aside for you to pick up?"

Review again the two conversations—the one on the previous page and the one above. If the part is in inventory, both will result in the customer receiving it, probably at about the same time, and for the same cost. But if you were the customer, which organization would you rather do business with?

Representing the Dealership—and the Brand

As you go through this course, remember several things.

Whenever you pick up the phone with a customer at the other end, you *are* the dealership and the truck brand your dealership represents. They called the company—they got you. So to them, you are the company. If you don't know the answer to their question, they don't care. If their issue is "not your job," they don't care. They want answers to their questions, and they want their issues resolved.

Of course, you may not know the answer. Or you may not have a resolution to their issue. But good customer service requires that you find them an answer or resolution, or at least the person who can help them.

Your "telephone role" is to:

- Delight your customers by identifying their expectations and then exceeding them.
- Stay with customers until their issues are resolved or until they are handed off to someone who can help them.
- Be "telephone organized," able to use the telephone effectively without generating undue commotion.
- Know what to do when you don't know what to do (when you don't know the answer to the customer's question or how to resolve their issue).

Your Other Customers

Customers are often thought of as "those people who buy things from us." Don't forget that anyone who calls you at your business has an expectation of you and so is also a customer. These "internal customers," often dealership or Freightliner LLC employees themselves, deserve the same application of telephone skills.

Summary

In today's highly competitive business environment, successful companies are always searching for ways to make them "stand out" as special to their customers. These companies know that providing their primary business services *perfectly* to meet customers' expectations can only achieve a grade of "C." It gets them into the game, but doesn't allow them to play effectively.

To differentiate your business from your competitors, you must demonstrate strong customer service skills to provide noticeable differences in the way that your primary business services are delivered.

People whose job includes significant communications with customers on the telephone demonstrate their customer service skills through telephone techniques that identify the expectations of the customer, and then exceed them.

Before the First Call

When thinking about “telephone skills,” it might seem apparent that most, if not all, of those skills are associated with being on the phone with a caller. The majority of the skills you will learn in this course are associated with the call itself.

However, there are several things that successful telephone users do to set up an effective telephone system before the phone ever rings. Doing so ensures that the calls will be effective and seamless. This section details some of the things you can do before the first call.

About the Telephone System Itself

Coverage

The best phone skills in the world will not overcome the customer irritation that results from the phone not being answered in the first place. Coverage should be available to ensure that at least 80% of incoming phone calls are answered after no more than 3 rings.

- Place telephones in key areas of the dealership to make them easily accessible to employees who have the responsibility to answer the phones.
- Assign primary phone answerers, people who would normally respond to the call, in sufficient numbers to answer at least 80% of incoming calls within 3 rings.
- Assign secondary or backup phone answerers. These peoples’ role and responsibilities may vary depending on your specific environment, but, in general, they would pick up a phone call after a specified number of rings, and be trained to respond to the caller’s needs. Some companies assign backup answerers to cover the 20% of the incoming calls that aren’t picked up after 3 rings.
- Consider hiring a Receptionist if your call volume warrants it. Many businesses are now using automated call answering systems with a message such as: *“Please listen to the following menu, as the choices have changed.”* These automated systems are perhaps more cost-efficient in the short run, but most customers still prefer the ability to quickly connect with a live person.
- Keep logs of your call volumes during specific periods of the day and days of the week. You may find interesting variations you weren’t aware of. Knowledge of these patterns can help you assign more people with phone-answering responsibility when call volume is expected to peak. Make sure there are enough phones for the people assigned to answer them.



Those Forgotten Times

Make sure that sufficient phone coverage exists during lunch breaks and shift changes. These times are easily forgotten but may be times of especially high call volume—the callers are on their lunch break too!

Distracting Environments

Certain areas of your dealership are inherently noisy. There also might be areas that are centers of activity and conversation, such as the Parts Counter. Callers to your dealership can hear all of these distractions, which can diminish the quality of the call and their favorable view of your business. It's not possible to quiet the shop each time the phone rings, but there are some approaches that may help reduce annoying distractions.

- To the extent possible, remove the phones from the areas that experience the most noise and conversation.
- Consider portable phones, such as cordless phones or even cordless headsets, which enable the call answerer to move to a quieter location if distractions become overwhelming.
- Keep phone sets off counters or other areas that contribute to noise. For example, a phone placed directly on the parts counter will loudly transmit the sound of a heavy part being placed on the counter.
- Consider phones with volume controls or, if appropriate, headsets. Consult with your local phone provider.
- If a phone is in a location where its ringing cannot always be heard, contact your local phone company for an auxiliary light that flashes when the phone rings.

The Communications Kit

Having answered the phone in a timely manner, and in a place where distractions are minimized, the next issue is to have at hand the “tool set” or “communications kit” that contains the things that are necessary to conduct an effective conversation. Having the right materials nearby prevents the distraction of having to say to the caller, *“Hold on, let me find a paper and pen.”*

The content of your communications kit may vary phone by phone. For each phone, ask yourself, *“What is done at this phone?”* If the primary purpose of the phone is to take questions on parts availability, then there should be a notepad and computer terminal by the phone. Communications kits usually contain some combination of the following items.

- Message, notepads, and Post-it® Notes.
- Pens, pencils, or other writing instruments appropriate for the location.
- A small chalkboard or whiteboard if group messages are written at the location.
- A list of key phone numbers, both within and outside of the dealership, for transferring calls. For numbers outside of the dealership, contact names should be included.
- A computer terminal if electronic information is accessed while on the phone.
- Any files, information, manuals, or other material that may be needed in the course of a call.

How Do I Do That Again?

Every phone should have posted instructions for placing a call on hold, and transferring calls. To the extent possible, the instructions should be in both words and pictures, and all employees must be trained on the procedures.

Someone should be made responsible for weekly visits to each phone location to replenish the contents of the communications kits.

Your Dealership's Automated Message

Calling customers always prefer to talk to a “live” person. But there are three situations when there may be a need to connect the caller with an automated message. In each case, there is a proper approach to take.

The Automated Attendant

Most people who call a business are not pleased when they hear:

- *“Thank you for calling Champion Sterling. If you know your party’s extension, please dial it now....”*

Callers generally don’t mind that an automated attendant answered as much as they mind the robotic greeting. There are several things that can be done more effectively.

- Tell the caller very early in the message how he or she can get to a specific extension or person. Pressing “0” is the usual method. Often that is then followed by a main menu.
- Discard the voice that came with your phone system and replace it with a friendly, personal message.
- Make the recorded message positive. Don’t tell callers when you’re closed—tell them when you’re open.
- Do NOT say, *“Your call is important to us!”* Most callers will simply wonder why, if that is true, you didn’t directly answer the phone.

For an example of an automated attendant in another industry that incorporates many of these ideas, call Gateway Computers at 1-800-846-4208, and listen to the automatic attendant’s message. Notice that the message immediately provides a quick “way out” if you know the extension, then the main menu—all with a friendly, non-robotic voice.

Your Voice Mail Greeting

The standard voice mail greeting is:

- *“Hi, this is Mary. I’m either on the phone or away from my desk right now. Leave a message and I’ll get back to you as soon as possible.”*

While friendly, this message unfortunately conveys no information that isn’t already known or that is useful to the caller. Because the caller reached your voice mail it’s obvious that you’re not around. Your voice mail message is an opportunity to provide pertinent information in a more effective manner.

Callers usually want to know these things:

- Your name and your department
- Where you are if you're away from the building (omit this if you're in the building)
- When you will return if you're away from the building (also omit this if you're in the building)
- Who the caller can turn to for help in your absence
- How to get another person on the line

It might sound like this if you're away from the building:

- *"Hi, this is John Smith of the service department at Champion Sterling. I'm on vacation this week, returning October 8. If you need help right now, dial 0 and ask for Bill Jones. Otherwise, leave your name, phone number, and how I might help you, and I'll get back to you on my return. Thanks and have a great day."*

Or, you might choose:

- *"Hi, this is John Smith of the service department at Champion Sterling. I'm on vacation this week, returning October 8. If you need help right now, dial 0 and ask for Bill Jones. Otherwise, leave your name, phone number, and how I might help you. I check my voice mail several times a day and will respond as soon as possible. Thanks and have a great day."*

If you're in the building:

- *"Hi, this is John Smith of the service department at Champion Sterling. If you need help right now, dial 0 and ask for Bill Jones. Otherwise, leave your name, phone number, and how I might help you, and I'll get back to you as soon as possible. Thanks and have a great day."*

The Hold Message

Later in this course, we'll talk about the techniques used to place a caller on hold. For now, it's important that during the hold pause the caller hears something that is useful to your business.

- Avoid the "silent hold," where only electronic hissing greets the customer. Most people start to feel their call has been lost when they confront such silence.
- Music is better than the silent hold. However, music does nothing to help position your business in callers' minds, and no single style of music suits all callers.
- The best approach is to use a recorded message (with a friendly voice, see "Automated Attendant" on the previous page) that provides useful and/or interesting information, such as maintenance tips, specials, little known capabilities of your dealership, the benefit of remanufactured parts, etc.

About the People Who Answer the Phone

The most important part of your phone system is the person who answers the call. A prompt answer, good messages, non-distracting environments, and effective communications kits do not overcome the negative effect of a discourteous answerer. Many techniques associated with the answerer's demeanor will be covered later. These are general principles that you should consider before the phone ever rings.

The frame of mind with which you answer the phone—your attitude toward that responsibility and toward the callers—may vary. You might look forward to the challenge of the calls. Or, you may dread the thought of dealing with some of the callers who you know through experience are likely to be very difficult. This course cannot automatically adjust your attitude. But remember that whatever your attitude toward calls is today, that attitude is your choice, and can be changed by you whenever you wish to do so. There are three specific ideas that might help you adjust your attitude to one that is more patient and supportive.

- Remember that in almost all cases angry callers are not angry with you personally. Their anger is the visible result of an issue that is very real to them. Unless you directly caused the issue, you've simply gotten in the way of their emotional response. Don't be hooked by their behavior. Try instead to get at the cause of the anger, and fix that problem. There will be more specifics in a later part of this course.
- You are allowed to restart your day at any time. That means that a difficult call doesn't need to affect you once you've completed it. Take a deep breath, and emotionally start your day all over again.
- Don't "come down" on the next caller because the last caller was difficult. If necessary, take a break for a few minutes, breathe deeply, and try to laugh about the experience. Then approach the next caller without emotional baggage.

Finally, if you experience high call volumes and find that stress builds, implement some steps during the day that relieve the stress.

- Discuss with your supervisor the option of taking frequent short breaks during the day.
- Stretch or exercise during the day.
- Don't allow yourself to get hungry.
- Get plenty of sleep.



Summary

Take this assessment to determine those areas of your dealership where you have implemented effective ways to handle incoming calls, and to identify those areas where additional effort may make your telephone communications a more effective part of your business.

Do you...	✓
Have phone coverage that answers 80% of incoming calls within 3 rings?	
Keep logs of call volume so you'll know how many people you need to answer phones?	
Place phones in a non-distracting environment?	
Employ technology to deal with noisy environments when they are unavoidable?	
Have proper communications kits at each phone location?	
Replenish the communications kits periodically?	
Have a friendly automated attendant that provides callers with quick choices?	
Have informational voice mail messages?	
Provide useful messages for callers on hold?	
Recognize that your attitude toward callers is your choice?	
Recognize that you can change your frame of mind anytime during the day?	
Implement stress-relieving techniques?	

Incoming Calls



Incoming calls to your dealership provide an ongoing opportunity to utilize good telephone skills. The way the call is answered and handled creates a very strong impression in the minds of the callers, and can determine the extent to which the caller is likely to continue doing business with you.

This section will describe a general role that you should assume when answering business calls, and a *phone conversation model* that will be used throughout the rest of the section. Then, some key behavioral skills applicable to any conversation, business or not, will be described. Ways to handle specific types of calls will be analyzed. Finally, key telephone processes, such as “hold” and “call transfers” will be described.

Don't Do as They Do!

A somewhat informal TV network survey showed that as April 15 neared, tax preparers with questions could wait as long as 40 minutes to get through to an IRS office, where they received the wrong answer 40% of the time. The IRS might be able to get away with that—they're the only tax game in town. Your business cannot.

Your Job as a Phone Answerer

Every call you receive at your dealership is, in some way, different from all the others. It's unique. The callers are different, or in different moods each time they call. The issues change. In this course, it is impossible to demonstrate all of the specific responses that you might need in your conversations. They are probably infinite in number. So, all of the skills and techniques that will be discussed in this section are general in nature, and require that you add the substance or the words to your conversations. As we've seen earlier with the parts department caller, there's good substance, and poor substance.

While the choice of your words may vary, there are some guidelines that can help you decide what you might want to say and especially how you might want to say it for any telephone situation that you encounter. These guidelines are your job description as a phone answerer.



Read the following seven items, and select all of those that you think are appropriate responsibilities of a phone answerer.

	✓
1. Determine what the customer's needs are.	
2. Answer the call in a friendly, welcoming manner.	
3. Immediately transfer the caller to someone else.	
4. Complete the call as quickly as possible, to take the next call.	
5. Accept total responsibility for the caller's issues.	
6. Get to the business reason for the call right away.	
7. Decide what the customer wants and provide it.	

How did you do? From this list, the only appropriate responsibilities of a phone answerer are numbers 1, 2, and 5. Let's first examine the activities that are *inappropriate*.

Number 3: "Immediately transfer the caller to someone else." This one was probably easy for you to select as inappropriate. While transferring the call might be the result of your conversation with a customer, doing so immediately usually signals that you don't really care about the customer's issues enough to carefully determine if their call should be transferred, and if so, to whom.

Number 4: "Complete the call as quickly as possible, to take the next call." A high call volume can be stressful, and can motivate you as phone answerer to complete each call and move on the next one as quickly as possible. Unfortunately, your customers will sense they are being rushed, and you are likely to miss key opportunities to build your business relationships with them.

Number 6: "Get to the business reason for the call right away." This one might not have been obvious to you. After all, getting to the business of the call might seem to be the central reason that the customer has called. Sometimes that is true. Often though, the customer wants to feel a personal touch in the call. And in some cases, a more personal segment of the call is essential. We'll see why later.

Number 7: "Decide what the customer wants and provide it." You may have noticed that this responsibility seems inconsistent with number 1. Many professionals make the mistake of assuming they know what the customer wants more than the customer knows.

The main job of a phone answerer is really only a few things. We'll look at the details of each of these jobs later, but let's summarize them here.

Find out what the customer wants and provide it.

Customers almost always know what they want. They just don't always know how to ask for it. They may not know your "parts language," for example. They may be aware of the function of a part, but are unable to name it. So your job is not to tell them what their needs are, but instead to interpret their words in a way that enables you to fulfill and then exceed their needs.

Accept responsibility for the customer's issues.

After you have carefully interpreted the customer's needs, you may decide that you can help meet those needs, or you may decide that someone else is better equipped to do so. Either way, while you are working with the customer, remember that you are representing the dealership and the truck brand to them, and they expect a resolution to their problem or issue. So stay with the customer until the problem is resolved or until you are sure they are connected with someone that can help.

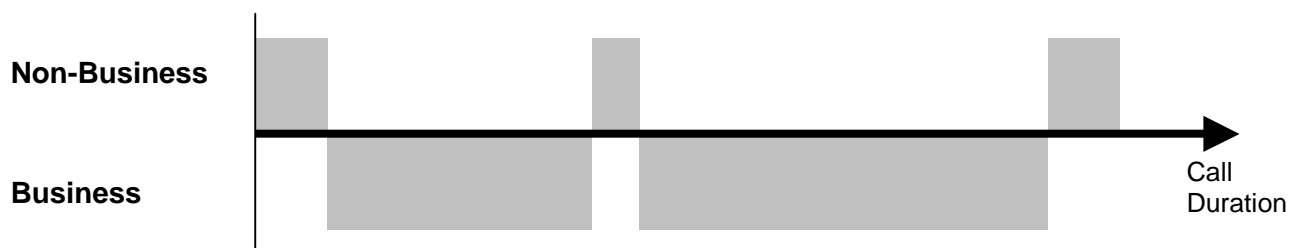
Do so in a friendly, welcoming way.

Your approach to the call can be friendly and welcoming, or it can be distant and detached. You saw an example of each approach in the last section of this course, and decided which you'd prefer as a customer.

The Structure of a Phone Conversation

A business phone call might easily be envisioned as a factual, no-nonsense, business-only communication. A successful business phone call that includes solid customer relations, though, includes communications of a non-business nature. Some of these elements of conversation are consistently used for any call. Sometimes, the nature of the call requires that you use less non-business communication, sometimes more.

During the course of the call, the conversation actually moves between business and non-business elements of the call. The call may look something like this:



A call should always start with some non-business elements, and should always end with non-business elements. And there is often one or more uses of non-business elements during the conversation.

Non-business conversation elements include such phrases as:

- Hi, my name is _____.
- I can appreciate that you're upset!
- I'm sorry that happened.
- That sounds good!
- I'm glad you like it.
- I think you made a great choice.

The business elements of the call include phrases like:

- How can I help you?
- What is the part number?
- When do you need that part?
- Let me look up that information for you.
- When did you buy the part?
- So, you're concerned about _____.

It's easy to see how these elements apply if we go back to the two conversations that were described earlier. In the first, the phone conversation went like this:

[phone rings]

Counterperson: "Parts."

Customer: "I'm looking for a 21SI alternator. Do you sell those?"

Counterperson: "Yeah."

Customer: "Uh, do you have one in stock?"

Counterperson: "Don't know. I'd have to look."

In this conversation, everything said by the Counterperson was a business element. Nothing was non-business. While it may seem efficient, the sole use of business elements coupled with the fact that they are very abrupt, makes the conversation cold and impersonal. It doesn't fulfill the responsibility of the phone answerer to provide a friendly and welcoming response.

Note how the following Counterperson mixes business and non-business elements to make the call much friendlier sounding. The non-business elements of the call are shown in underlined and bolded text, **like this**.

[phone rings]

Counterperson: "**Hello**, this is Freightliner Parts. **My name is John**. How may I help you?"

Customer: "Hi. I'm looking for a 21SI alternator. Do you sell those?"

Counterperson: "We sure do. Let me check if I've got one in inventory. **It will take about 30 seconds. Would you like to hold?**"

Customer: "Sure"

Counterperson: *[pause]* "**Hi**, I've got one. Shall I set it aside for you to pick up?"

This model will be used to characterize some of the major differences between types of calls. The inquiry call, for example, has a different pattern of business and non-business elements than does the complaint call.

Key On-the-Phone Behavioral Skills

Certain techniques are used for all phone calls. They include using a friendly tone of voice and strong listening skills. They avoid distracting mannerisms and the use of company jargon.

Your Tone of Voice

When you talk with someone face-to-face, there are all kinds of signals besides your voice that alert the listener to your emotional state. You're like a television set, with sight *and* sound. When you talk with someone on the telephone, all you've got is your voice. You're like a radio. So the tone of your voice conveys to the listener whether you're supportive of the call, angry to have been interrupted, bored by the caller, frustrated, confused, or whatever you are feeling. The listener can "see" your tone of voice.

Try this simple exercise. Say the sentence below four times. Each time, try to use just your voice to convey the emotion next to the sentence. Ask a friend to listen without watching your face, and see if he or she can tell what your emotional state is. Better yet, try the exercise during a phone call.

- *"I don't have that part."* – said **angrily**
- *"I don't have that part."* – said **apologetically** or **defensively**
- *"I don't have that part."* – said with a **bored** voice
- *"I don't have that part."* – said **confidently**

The same words can have different meanings to the listener, depending on your tone of voice.

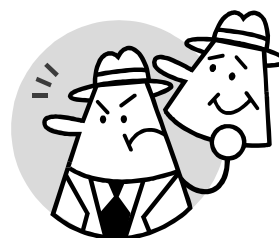
The best way to ensure that the tone of your voice conveys a welcoming and friendly approach is to actually smile each time the phone rings, just before picking it up. Try it. Say the sentence above in an angry tone of voice, but with a big smile on your face. Hard, isn't it?

Distracting Mannerisms

Something that is very distracting to one person might be invisible or unnoticed by another. That means that something that you might think is not distracting, or that doesn't distract you when you're the caller, might be very annoying to your calling customer.

This course cannot name every distracting behavior. There are too many. The solution to this dilemma is to describe some of the mannerisms that people find most annoying. Then you can decide if you're doing anything similar.

- Avoid doing any work on a computer or other device that can be heard, unless the activity is directly related to the call. For example, you might be entering a part number to check inventory levels. In those cases, tell the customer what you're doing.
 - *"I'm going to check on the computer to see when those are going to be delivered."*



Give Your Face a Rest!

It takes 17 muscles to smile.

It takes 43 muscles to frown.

- Never eat, drink, or chew gum during a phone call.
- Don't make drumming noises with a pencil, or any kind of related rhythmic noise.
- Don't interrupt the caller to talk with someone else, unless it is related to a caller's request. Then ask permission to "leave" the caller temporarily.
- Ensure that you talk directly into the phone (especially if you use a headset) so callers don't have to ask you to "speak up."
- Try to avoid useless speech fillers, like "ums" and "ahs."

Use the Customer's Language

This section doesn't mean that if the caller speaks French, that you should speak French. There are other languages besides these. They're called *company jargon*.

- "I'll have to fill out a 4200 and send it to the CPW. They usually kick back an ISN if they've got it."

You might be very comfortable with phrases similar to the hypothetical one above. And you might be able to use company jargon like that with your internal customers who also speak jargon. But no external customer knows your jargon. So its use with an external customer conveys no useful information, and probably frustrates the customer because they don't understand you.

Listening Skills

Listening is one of those simple skills that can be hard. It uses behaviors that are very simple to understand, but those behaviors can (for some) be very hard to adopt. They require changing habits of a lifetime.

Listening skills are used throughout the conversation, not just during the times when the caller is talking. They are designed to do three important things.

1. They let the caller know that he or she is getting through to you. They build involvement and a better relationship with the caller.
2. They ensure that you as the listener get as much information as possible. That is, they cause the caller to provide *more information*.
3. They make sure that you and the customer have done more than listened—they make sure that you and the customer have actually *understood* each other.

Before looking at the specific listening skills that make these three benefits happen, look at some of the things that make listening difficult, and see which of these you might do on a periodic basis.



	✓
I open mail, work on the computer, or do other tasks while I'm on the phone.	
I become impatient with callers who are slow or who don't know exactly what they want, and I tend to finish their sentences for them.	
I think I know what the caller is going to say and tune out as a result	
I ignore clues about the caller's state of mind—things like tone of voice or the choice of words.	
I think about what I'm going to say or how I'm going to respond while the other person is talking.	
If I don't fully understand what the caller is saying, I sometimes pretend that I did to avoid embarrassment.	
I use phrases like “uh-huh” or “right” repeatedly instead of responding with full sentences.	

Most people are guilty of all of these behaviors some of the time. If you find yourself using any of these frequently, however, you might want to think specifically about those habits as you go through the rest of this course.

Listening skills are related to the three objectives that were stated on the previous page.

- While the other person is talking, put all other things aside and pay attention to what he or she is saying. Indicate that you're with the person by occasionally using a phrase like “uh-huh” or “right” or “that's interesting,” depending on the context of the statement. Don't overdo these phrases, and especially don't let them become rhythmic. The intent of this step is to cause you to hear the speaker's message, and to let the speaker know that you are connected.

- From time to time as appropriate, ask questions about the information you're receiving. Most callers don't rehearse their call to you. So they may not convey a very clear message. You will have to draw their request out of them. Also, most callers don't know all the information you'll need to be able to help them. So you're going to have to elicit it. The intent of this step is to ensure complete communication. It is a two-way element of conversation that provides you maximum information.

Try to use open-ended questions in this step. Open-ended questions are those that cannot be answered with a *yes* or *no*. Open-ended questions gather more information because they are usually answered with a full sentence, which can then generate another question. Sometimes the "question" is actually a statement. Look at the examples below, and decide which question or statement provides you with more information.

Closed-ended question: *"Is the part not working?"*

Open-ended question: *"What is happening that tells you the part is not working?"*

"Statement" question: *"Describe what is happening that tells you the part is not working."*

- Finally, test the quality of the communication by repeating what you've heard in your own words. Surprisingly, you will often find that your interpretation isn't exactly what the caller had in mind. This step allows the caller to correct your interpretation. Then you can each be sure that you've understood each other.

These three skill steps are used throughout the call. They are not necessarily applied in a stepwise fashion.

Finally, good listeners are "other oriented." They maintain their ideas during a call, but continue to orient themselves toward what is important to the other person, the caller. They are not self-absorbed, directing the conversation towards themselves and how things affect their needs.



Take Notes During the Call

The alternative to taking good notes during a telephone call is relying on your memory. But few people have perfect memories. Taking notes enables you to write the caller's name (easily forgotten if you don't write it), and then to use it during the conversation. You will also have a detailed record of the issues discussed and the commitments you made.

Answering Phone Calls

Having now reviewed the key behavioral skills that should be used in any phone call—effective tone of voice, avoidance of distracting mannerisms, avoidance of company jargon, and good listening skills—we can look at the actual skills of answering a phone. Remember to smile before you pick up the phone!

General Method of Answering a Call

Step	Why Do That?
Pick up the phone and don't say anything until it is to your ear.	How many times have you called a business and heard "izza" when you know you're calling <i>"Tony's Pizza?"</i> Pausing before speaking ensures that the caller hears your first words.
Use a non-business greeting phrase, such as <i>"Hello," "Hi," "Good morning,"</i> or <i>"Thanks for calling."</i>	These greeting phrases warm the relationship. Coupled with the smile in your voice, they say, <i>"Welcome. I'm glad you called."</i>
Return to a business phrase and state your company name, and your department. Say these confidently and clearly. Don't rush or mumble them. For example, <i>"This is Champion Sterling, parts department."</i>	You are confirming to callers that they have reached the correct number and location. Callers won't have to ask you for this information. You are also announcing that you're in the parts business, and can help with those kinds of issues.
State your name, clearly and slowly. <i>"This is John Mitchell."</i> This is back to non-business.	Saying your name does a few interesting things. First, it immediately creates comfort for the caller. It builds rapport. After all, if you're willing to give your name, you must be confident that you can help. Often, giving your name results in the caller responding by giving his or her name in return. Then, a strong communication bond has been established.
Ask, <i>"What can I do for you?"</i> or <i>"How can I help you?"</i> Then wait for the caller to describe his or her reason for calling.	You are announcing that you are "ready for business," and inviting the caller to respond. Use an open-ended question. Don't say, <i>"Can I help you?"</i>

Step	Why Do That?
<p>Respond to the caller's issues. Use the skills of listening discussed previously, and the skills of putting the caller on hold, if necessary, or transferring the call (both to be discussed). Use short non-business phrases from time to time as appropriate, just as you would in a face-to-face conversation with a friend.</p> <p>Here the caller will sometimes be very clear about his or her needs from you—other times less so. It is up to you to use the questioning skills discussed in the segment on “<i>Listening</i>” to fully discover the customer's issue(s) and expectations.</p>	<p>During this business segment of the call, the purpose of the call is completed.</p>
<p>Conclude the call with a non-business statement. “<i>Thanks for calling.</i>” “<i>Have a great day.</i>” “<i>Glad we could help.</i>” “<i>Call again!</i>”</p>	<p>Non-business statements signal that the call is ending, and in a way that invites the caller to phone again when another need that you can resolve arises.</p>

Here's an example of a simple phone call.

[phone rings]

Counterperson: "Good afternoon, this is Champion Sterling, parts department. My name is Fred Shute. How may I help you?"

Customer: "Hi, my name is Charlie Roberts. I need a new starter."

Counterperson: "Do you have the starter part number, Mr. Roberts?"

Customer: "No, I don't"

Counterperson: "That's OK, I can find it. But I'll need to know the VIN of your truck."

Customer: "Where would I find that?"

Counterperson: "It's on the certification label on the door jamb. I'll need the last 6 digits."

Customer: (after pause) "The number is A25360."

Counterperson: "OK, that's what I need to find the starter. I'll need to put you on hold for about 1 minute to see if we've got one. Would that be alright?"

Customer: "OK."

Counterperson: (after pause) "Mr. Smith, we've got that part in inventory. Are you planning to install it yourself?"

Customer: "Well, I don't know yet."

Counterperson: "If you're not sure, I'd recommend talking with our Service Manager. His name is Bill Knowles. Would you like me to transfer you to him?"

Customer: "That might be a good idea."

At this point, the Counterperson would probably complete the sale, and then transfer the call. That skill will be covered later in this course.

This conversation includes:

- A lot of information up front to assure the caller that he has reached the right place, and who he is talking to.
- Several examples of asking the caller for permission to proceed to the next step.
- Good listening skills. The Counterperson picked up the caller's uncertainty about installing the starter himself.



An Exercise

Read each of the customer phrases below, and select the best response from Column 1 or Column 2. Then, turn to the next page to check your selections

	Customer Phrase	Column 1 Response	Column 2 Response
A	I need a part.	OK, I'll need to know the number.	OK, give me the number.
B	Is that remanufactured part expensive?	Its price is \$325. That's \$200 less than a comparable new part, and it is under warranty for 1 year.	It's less than a new part, but just about as good.
C	Could you look up something for me?	Sure.	Sure. What do you need to know?
D	When are you open?	We're closed Saturdays and Sundays, open weekdays from 8 a.m. to 6 p.m.	We're open weekdays from 8 a.m. to 6 p.m.
E	Is it heavy?	No.	It weighs about 16 pounds.

The Answers

- A. *The best response is in Column 1. In this case, both responses mean the same thing, but Column 2 sounds more like a demand. Column 1 keeps the issue on what the Counterperson needs to do the job.*
- B. *The best response is in Column 1, which gives a specific answer to the question asked, and gives it right away.*
- C. *The best response is in Column 2. Both are agreeable responses. The response in Column 2 further invites the customer to continue with the request using an open-ended question.*
- D. *The best response is in Column 2, because it is a positive response. The customer didn't ask when the business was closed.*
- E. *The best response is in Column 2, because it doesn't assume what is "heavy" for the caller, just gives information that will let the caller answer his or her own question.*

Your Name Counts!

Giving your name when answering a phone call is like putting your signature on a letter.

It lets the other party know that you:

- Accept responsibility.
- Intend to handle the call in a professional way.
- Have pride in yourself and your organization.

Forbidden Phrases

Your job is to determine and satisfy the needs of the customer on the phone, and to do so in a way that brings that customer back to your business. Sometimes seemingly simple phrases have the opposite effect, and so should be avoided. Notice that all of these forbidden phrases are factually correct—the problem is that they tend to irritate callers.

Forbidden Phrase	Why?	Suggested Replacement
<p><i>“You will have to...”</i></p> <p><i>“He’s not in this department. You will have to call extension 4356.”</i></p> <p><i>“We’re not open Saturdays. You will have to come on a weekday.”</i></p>	<p>Telling a customer what he or she has to do can produce a defiant response. <i>“You’re not my boss. I don’t have to do what you tell me to do!”</i></p>	<p><i>“He’s at extension 4356. Let me transfer you to that number.”</i></p> <p><i>“Unfortunately, we’re only here on weekdays. Would any day next week be convenient for you?”</i></p>
<p><i>“I don’t know.”</i></p>	<p>The customer didn’t call to find out if you know or don’t know something. The customer called to get an answer from you, or to be connected with someone who has the answer. Saying, <i>“I don’t know,”</i> even if true, just causes frustration.</p>	<p><i>“That’s a good question. Let me find out for you.”</i></p> <p>or</p> <p><i>“I think that our Parts Counterperson will have a quick answer to that question. May I transfer you to him now?”</i></p>
<p><i>“It’s not our policy.”</i></p> <p><i>“We can’t cover that on warranty.”</i></p>	<p>Many customers interpret a negative statement like these as a way for you to justify your unwillingness to be helpful. On the other hand, most customers accept and are reasonable about actual company rules if they are stated positively. Avoid the word “policy.”</p>	<p><i>“I need proof of purchase to refund your purchase price.”</i></p> <p><i>“Our warranty is 12 months on that part from the date of sale. Its warranty period has expired.”</i></p>

Forbidden Phrase	Why?	Suggested Replacement
<p><i>“I’ll try.”</i></p> <p><i>“I’ll try to have the part here by Tuesday.”</i></p>	<p>This phrase seems reasonable, but typically you use it when you’re uncertain whether you can achieve the outcome or not. The customer hears “I’ll do it,” and will be disappointed if you fail. Tell what you <i>can</i> do.</p>	<p><i>“I will order the part today. Based on typical shipping times, I estimate it will arrive on Tuesday. I can track the order and will know for sure Monday morning. May I call you then?”</i></p>
<p><i>“Just a second.”</i></p> <p><i>“I’ll have to look that up. Just a second.”</i></p>	<p>How often has a person on the other end of a phone call with you said “just a second” and it was, in fact, only one second? Callers roll their eyes and sigh when they hear this obvious fib. They want to hear a realistic estimate of how long it will take.</p>	<p><i>“I’ll have to look that up. I expect it will take about two minutes. Are you willing to hold while I do that?”</i></p>
<p><i>“We can’t do that.”</i></p> <p><i>“We can’t give you a refund for that part.”</i></p>	<p>This, of course, might be true. But again, your customers aren’t interested in what you cannot do. They can be reasonable though, if you tell them what you <i>can</i> do, even if it’s not what they originally requested.</p>	<p><i>“I can provide a replacement for that part at no cost to you.”</i></p>
<p><i>“What’s your problem?”</i></p>	<p>This phrase is commonly used in the context of “Describe what’s wrong.” To many, it sounds easygoing when said with the right inflection. But to many customers it shuts down communication. You should instead invite communication.</p>	<p><i>“Describe the difficulty that you’re having.”</i></p>
<p><i>“..., but...”</i></p> <p><i>“I’d be happy to look up that part number. But, my computer isn’t working right now.”</i></p>	<p>The word “but” is the other shoe dropping. When placed as shown in the middle of a sentence, the sentence builds an expectation of success in the mind of the customer, then instantly snatches it away. Tell the customer directly what you’re able to do.</p>	<p><i>“My computer is not working right now. When it’s back up I’ll be able to find that part number. I expect that will be in less than an hour. May I call you then?”</i></p>
<p><i>“I need you to...”</i></p> <p><i>“We should look at that, so I need you to bring your truck in to our service department.”</i></p>	<p>Most customers sense that you really don’t “need” the things you’re asking for with the phrase. They see it as manipulative. Again, ask directly.</p>	<p><i>“We should look at that. Will you bring your truck in to our service department?”</i></p>

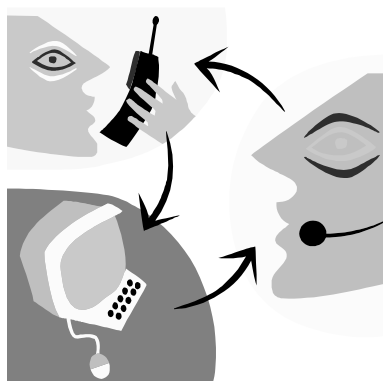
Technical Calls

For the purpose of this course, a technical call is one that requires a technical or informed conversation with a caller who doesn't share your technical knowledge. So a call in which the customer begins with a vague description of a vehicle symptom would be an example of a technical call.

Technical calls should be treated in a similar way to the general phone calls shown above. Begin with a greeting, state the business name and department, your name, and ask how you may help the caller.

Technical calls differ from general calls in the business content. They require that you gain as much information as possible about the technical issue, and then determine what needs to be done to solve it.

- Be very careful to avoid company or technical jargon. Remember that your first obligation is to communicate with the caller, and jargon is a language they don't understand.
- Question the caller patiently and steadfastly to get complete information. Even if you avoid jargon, they may not know the technical terms that facilitate communication on the subject.
- Don't make any comments that belittle or poke fun at the customer's lack of technical knowledge.
- Check for understanding more frequently, using statements such as *"My understanding of what you're telling me is ..."*
- Apply the "unknowledgeable friend" test. Ask yourself, *"If I were having this conversation with my best friend who knows nothing about my job, would the conversation sound like this?"* If it wouldn't, adjust the way you're talking to the business caller.



Screening Calls

When your job includes answering the phone for someone else at the dealership, you probably *screen* the calls for that person. It might sound something like this. The phone rings, and the caller asks for Ms. Larkin.

- *"May I have your name? What company are you with? What's the purpose of the call?"*

This third degree interrogation is either intimidating or offensive. It may be used with the noble intention of supplying Ms. Larkin with adequate information about the caller, to make the call more efficient. But to the caller it implies that he or she must run a gauntlet to get to talk with Ms. Larkin. A much better way to screen calls is:

- *"Thank you, I'll ring her office. May I tell her who's calling, please?"*

Complaint Calls

Complaint calls are answered the same way any other call is answered. The difference is apparent only after you've given your name and asked how you could help the caller. With complaint calls, the caller may or may not be abusive or use profane language. We'll look at those situations in the next section. For now, we'll deal with a caller who just has a complaint—something is wrong and needs to be fixed, at least in the mind of the caller. The caller is upset, but not yet “abusive.”

These calls present both a challenge and an opportunity. The challenge is to solve the customer's problem. The opportunity is to recover the trust and keep the business of the customer.



Effective handling of complaint calls requires a procedure that is shown below. The procedure relies more heavily on non-business elements of conversation. Handling of complaint calls also requires the right frame of mind. There are two rules of thumb that can help.

- Whether you believe the complaint is justified or not, the customer does believe it is. You can respect the customer's belief without personally adopting it. As a result, you will never tell the customer that he or she is “wrong.”
- Acknowledging the customer's feelings about the situation does not mean you agree with the situation. So saying “You sound really upset about this” doesn't mean that you have agreed that there is something to be upset about, only that you have observed that the customer is upset.

While these two rules of thumb may seem unimportant, they guide what is done during the complaint call.

- **Listen carefully** to the complaint, applying all of the listening skills described earlier. Suspend judgment about the validity of the complaint until you have learned exactly what it is, and the circumstances surrounding it. Ask probing but neutral questions about the situation. Neutral questions assume that the caller is right, and are phrased only to elicit more information.
- **Acknowledge the situation** and the apparent emotions of the caller. If the customer said it, it was meant for you to hear it. So respond. Remember, this doesn't mean you *agree* with the customer's assessment of the situation.
 - *“I can hear that you're upset about this.”*
 - *“You sound really frustrated that this happened.”*

An acknowledgement response (you may have to do several for really emotional callers) tells the caller that you have heard not only the substance of the complaint, but the feelings that the issue has raised in the customer. This often allows the customer to emotionally move into a problem-solving mode.

If you think that an apology is justified, do so. But make sure that the apology contains the reason for the apology.

- *“I'm sorry that you got the wrong part.”*

- **Summarize the caller's point of view.** When you are sure that you know exactly what the circumstances of the complaint are, and that you have acknowledged any emotions that are apparent in the caller, you can move to problem solving. Begin by making sure that you both share the same view of the situation.
- **Ask the caller what he or she thinks will help.** The caller might ask for something that you cannot provide, but you nevertheless need to hear what the caller's expectations are.
- **State what you can do.** Don't tell the caller that you cannot do what he or she wants. State confidently and positively what you are *able* to do. Ask if your offer will help solve the problem with the customer.
- **End the call positively.** If the customer has accepted your proposal for a solution, thank him or her. Apologize for the situation again, if appropriate, and wish the customer a good day.

The Best Response

Read each scene and decide whether the next best phrase is A or B, and why.

Scene 1: The caller says, *"I've made four phone calls to your company this past week, and I still am waiting for someone who knows what they're doing!"*

- Response A: *"It sounds like you're really frustrated."*
- Response B: *"What's the problem?"*

Scene 2: After questioning the caller about the complaint, you say, *"I think I understand the problem."*

- Your Next Phrase A: *"Here's what I'll do."*
- Your Next Phrase B: *"Here's what my understanding is."*

Scene 3: The caller wants to replace a faulty but warranted remanufactured part with a new part.

- You Say A: *"I can't do that."*
- You Say B: *"I can give you a newly remanufactured part."*

Scene 4: A particularly difficult caller has finally agreed to the solution you've offered, and the call is ending.

- You Say A: *"Sorry for the problem. I hope you have a good day."*
- You Say B: *"Goodbye."*

Scene 5: The caller says, *"I was billed twice and now I find out you're not even the right person to help me!"*

- Response A: *"Accounting is really busy and couldn't pick up the phone."*
- Response B: *"I'm sorry about the billing error. I'll transfer you to Accounting now."*

The Answers

Scene 1 – Acknowledge the apparent emotion before you get down to business – A.

Scene 2 – Make sure that you have, in fact, understood the caller's complaint – B.

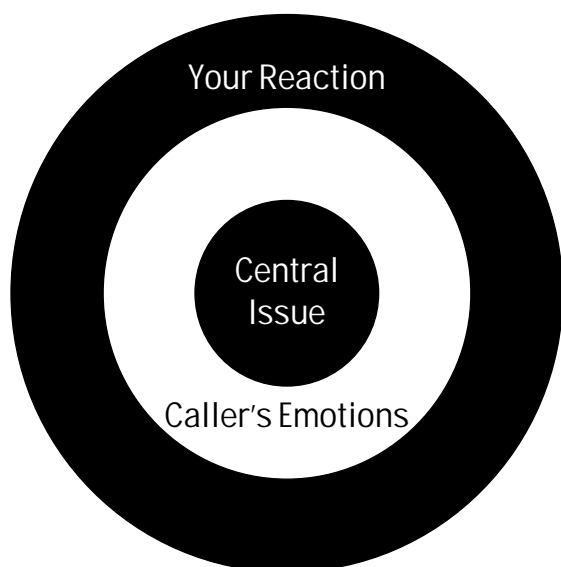
Scene 3 – Don't tell what you can't do; state what you are able to do – B.

Scene 4 – Difficult or not, end all conversations in a friendly way – A.

Scene 5 – Don't make excuses – B.

The Angry Customer

Sometimes the complaining caller is extremely angry, and may use abusive language. The first thing to remember is that the customer is not angry with you personally—you're just the object of the anger. The second thing to remember is that something is causing, or is *central* to the caller's behavior. If you can get to the reason for the emotional outburst, you will improve your odds of handling the situation effectively.



The "central issue," shown at the center of these circles, is the reason that the caller is angry, and, therefore, being abusive. That central issue is certainly known to the caller, but is usually not apparent to you when you answer the phone.

The central issue produces the *caller's emotions*, which is what you hear.

Because the caller's emotions— but not the central issue—are apparent, you tend to react not to the issue, but to the caller's state of mind. As a result, *your reaction* is often similar to the caller's emotions. If the caller is angry, you may tend to respond with anger. If the caller is sarcastic, you may tend to respond with sarcasm.

In each such case, you are "hooked" by the caller's emotional state, in the same context that a fish is hooked by an angler.

The key to dealing effectively with a highly emotional caller (or anyone in your life) is to avoid being hooked by the caller's behavior, and to make an effort to get at the central issue that is creating the behavior.

- **Recognize** that the emotional state of the caller is not aimed at you. Remain calm, and acknowledge the emotion that you hear just as you would do with a complaining caller.
 - “You’re really furious about what happened.”
 - “You seem really angry about this situation.”



With truly angry callers, you may need to acknowledge the observed behavior more than once. At first, acknowledging the emotional state of upset callers may be difficult, but it's very important. When a caller is emotional, those emotions are a form of communication. The caller is using the emotion to show you that he or she is upset about something—they just haven't told you that part, yet. When a person is communicating in this way, they need a signal that you have “received their message.” They need to hear that before they can start to calm down. Once they've heard it, they usually are willing to begin to talk about the central issue.

When You Get Angry

When you work with very angry callers, you might find it hard to avoid getting angry yourself.

Silently remind yourself that it is *their* anger, and their anger is *their* problem. Remind yourself that you should be willing to help them with their issue, but that you don't take responsibility for their feelings, just yours. (Don't say this to a caller).

If a caller's anger controls you, you will say, “*He made me angry.*” You will blame the caller for your feelings. Without an apology from the caller, which you're unlikely to get, the feeling is hard to let go.

If you take responsibility for your own feelings, you will say, “*I got angry.*” That is, you just decided to be angry. Then, you can just as easily decide to let the anger go.

- **Ask** the caller to describe the reason for the emotion.
 - “Tell me exactly what has happened.”
 - “What happened to make you so angry?”
 - “How do you view the situation?”
 - “What do you think is causing the problem?”
- **Accept responsibility** for the issue.
 - “Let me see what I can do about this.”

You would have answered this call not knowing the caller would be emotional, and would have used your name as we've seen earlier. Because the caller is in an emotional state, he or she probably never heard your name. This is a good place to reintroduce yourself. That provides an enormous level of comfort to the caller—help is here!

- “Well, again, my name is Larry Fischer. Let me see what I can do about this.”

- **Help the caller.**

- *“Here’s what I suggest. I will ...”*

At this stage, the caller is generally much calmer and able to discuss the issue. If the help involves putting the caller on hold, or transferring the caller to someone else, there is a high level of risk that the caller’s emotions will reignite. Make sure that you carefully use the correct techniques for putting a caller on hold or transferring a caller, which will be discussed in a later section of this course.

The Special Case of the Profane Caller

Sometimes an angry caller uses profane language. You do not have to listen to such language. Here are two points to think about:

- **Never argue** with or respond to these callers in kind. You and your business will lose every time. Remember the old saying: *You get more flies with sugar than with vinegar.*
- **Interrupt the caller** with a polite statement that you will not put up with the profanity. This is one of those times where it would be useful (though hard) to first put a smile on your face.
 - *“Excuse me. I can handle your issue. But, I can’t handle your abusive language.”*

When confronted with the statement above, most people immediately calm down and some may even apologize for their behavior. Don’t comment on the apology. The behavior has ended, and there is no sense talking any more about it

- **Ask** the caller to describe the reason for the emotion.

Continue with this step and the remaining steps described above.

“No”

Sometimes, *no* is the honest and correct answer. But it can be blunt. Try to eliminate the word *no* from your answers.

“Can you deliver that part today?”

“No. The truck has already left.

Wouldn’t you rather hear this?

“Can you deliver that part today?”

“I wish I could, but the truck has left already.”

When You Need to Get Back to the Caller

There will be times when you are unable to resolve a caller's issue while you are on the phone. Additional research or investigation may be necessary. You may need to talk to another person who is not immediately available. The two basic techniques for this situation are to 1) make sure it's OK with the caller, and 2) fulfill your commitment.



Make Sure It's OK With the Caller

- Explain that you are unable to resolve the issue during the phone call, and why.
 - *“I will have to talk with our Parts Manager to get an answer to your question, and he is not available at this time.”*
- Apologize for the inconvenience possibly caused to the caller.
 - *“I’m really sorry to cause you this inconvenience.”*

Don't apologize for needing more information that isn't available right now, or for the fact that someone is unavailable.

- ***Don't say,*** *“I’m really sorry that I have to talk to our Parts Manager.”*
- Make a reasonable commitment to respond to the caller, and ask for the caller's acceptance of that commitment.
 - *“Our Parts Manager is due in late this afternoon. Would it be alright if I call you back by 9 a.m. tomorrow?”*
 - *“Well, if 9 a.m. is too late for you, I can try to get back later this afternoon. I’ll do my best.”*

Notice that this last sentence responds to a caller who apparently didn't want to wait until 9 a.m. And the script includes the phrase *I can try...*, a phrase that was on our list of Forbidden Phrases earlier. In this case, the customer has requested a response time that may or may not be possible, so the phrase is acceptable.

Don't tell the caller you'll get back as soon as possible (ASAP). Try instead to be specific, but don't make a commitment that you can't keep.

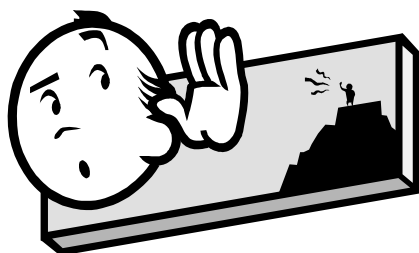
- ***Don't say,*** *“I’ll be back to you as soon as I can.”*

Fulfill Your Commitment

Your ability to respond in the time frame you agreed to is your currency of trust, and will largely determine whether this customer will continue to do business with your dealership. There will be additional tips on how to ensure that you fulfill your commitment in a later section of this course.

“Problem” Callers

From time to time, you will confront callers that try your patience or that you just cannot understand. In all these cases, it is important to deal with the issue without damaging the self-esteem of the caller.



The Fast Speaker

Telling the caller “*You’re talking too fast*” may sound like an accusation to them, and you want to avoid doing that.

Instead, stress that you want to help by getting the necessary information to resolve the caller’s issue, and that *you* are having difficulty. That puts the responsibility for the problem speaker on *your ability to understand*, not the *caller’s ability to speak*.

- *“Excuse me, I’m having some difficulty understanding you. If you would just slow down a bit, I’ll be able to get this information correctly for you.”*

Almost all callers will slow down to make sure you can understand them. If you’re taking notes, tell the fast talker...

- *“Excuse me, I’m writing this down. If you would just slow down a bit, I’ll be able to get all the information correct.”*

The Difficult Accent

People for whom English is a second language can present special challenges on the phone. A little patience is all that is required. People who struggle with pronunciation and sentence structure know that’s the case. They don’t expect miracles from you—only a genuine effort to communicate with them.

- **Don’t pretend that you understand** what is being said. You don’t want to end the call and then wonder what it was all about! The first step is to try the phrase suggested for the fast speaker.
 - *“Excuse me, I’m having some difficulty understanding you. If you would just slow down a bit, I’ll be able to get this information correctly for you.”*
- **Summarize what you understand** more than you might ordinarily do.
 - *“So you installed the part last week, and now it doesn’t seem to be working correctly?”*

- **Don't shout.** People with foreign accents are not hard of hearing. Yet many people think volume will somehow overcome language differences.
- **Don't be rude.** Saying "*I can't understand you*" puts the responsibility on the caller to make the communication more effective. The caller may be unable to do so. So take the responsibility yourself. Say instead, "*If you'd repeat that again, I'll be able to help you.*"
- **Keep a list** of useful phrases near the phone if a large percentage of your callers have the same ethnic background.

The Slow Speaker

On a busy day, slow speakers can be really frustrating. Often, they aren't fully sure what they want, or to whom they should talk. There are three things to remember.

- **Don't finish their sentences for them.** It might seem tempting, but it is rude. Also, you will probably be wrong and have to be corrected half the time, so you're not really gaining anything.
- **Provide choices.** At the point in their conversation where it becomes reasonably apparent where they're going, gently interject with several choices.
 - "*Do you need Parts or Service?*"
 - "*Are you calling to order a part or check our inventory?*"

Use this technique only when you're fairly certain that you can narrow the choices to two, and one of them is the right one. And ask the question in a friendly tone of voice.

- **Be patient.** It will provide long-term dividends to your business.

Key Phone Processes

Putting a Caller on Hold

There are three reasons to put a caller on hold. First, you've been talking with the caller and need to find some information that requires you to leave the phone or at least put it down. Second, you have answered the phone and it's for someone else who will be available shortly. Third, you're in a reception capacity and have several calls to answer.

Holding to Find Information

- Explain to the caller that you need to place him or her on hold. Briefly state the reason why.
- Provide a realistic time frame for the hold.
- Ask permission to place the caller on hold.
- *Optional, but helpful* – You may have experienced getting disconnected during a hold. If that happens with your phone system, ask the caller for his or her number in case there is a disconnection.
 - "*I'll have to find that information for you. It will take about 2 minutes. Would you like to hold while I look that up?*" [Then, after the caller's response], "*I don't expect to lose you, but just in case, may I have the phone number you're calling from?*"

Holding for Another Person

- If possible, try to service the caller either by taking a message or by dealing with the issue directly.
 - *“She’s on another call. If you’d like to leave your name and number, I’ll see that she gets your message.”*
 - *“She’s on another call. My name is Donald, and I work with her. How may I help you?”*

Reception Hold

How many times has this happened to you when you are making a business call?

- *[Ring] – “Ajax Industries, please hold.” [Click]*

Or even worse...

- *[Ring] – “Ajax Industries, please ho[Click].”*

How does that feel? There are times when you’ll have to put a caller on hold for no other reason than the phones are ringing “off the hooks.” But even then, apply courtesy and you’ll find that you’re quickly building stronger relationships with your customers.

- *[Ring] – “Champion Sterling. Would you please hold?” [Pause for response] “Thank you.”*

In all cases, check back with the caller every minute or so unless you’ve given a time frame for the hold and are still within it.

Transferring a Call

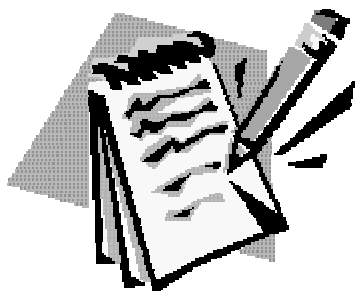
When transferring a call, provide information to both the caller you are transferring, and to the person to whom you are transferring the call.

- Explain to the caller the reason you are transferring the call, to whom you are transferring it, what that person’s name and job is, and how that person can help the caller.
- Always try to transfer the caller to a “live” person. When you succeed, identify the caller, state what his or her issue is, and that you’re transferring the call.
- If the person to whom you’re transferring the call isn’t available, don’t transfer the caller into voice mail without his or her permission. Use the steps for *Taking a Message* in the next section.
- To the extent your phone system allows it, confirm that the transfer has, in fact, taken place.
 - *“Ms. White, Mary in our accounting department would be best able to answer that question for you. May I transfer your call to her? [Pause for response]...*
 - *“Mary, I have Nancy White on the phone. She’s with White Truck Repair. She has a question about last month’s invoice. May I transfer her to you?”*

Never do a blind transfer, which is a transfer in which you don’t tell the caller what you’re doing and don’t talk to the person you’re transferring the call to. To the caller, there is just a click, and then another phone is ringing. The caller has to start his or her story all over again.

Taking a Message

Correctly taken messages give the caller a sense that something beyond leaving a message was accomplished during the call, and provide the message receiver ample information to be efficient when returning the call.



- Tell the caller where the person being called is, and when he or she is expected to return to the dealership. **Don't say**, *"She's not here right now."* That's fairly obvious to the caller, and doesn't provide any information that the caller wants.
 - *"Mr. Phillips is out of the office at a meeting. I expect him to return at about 3 p.m."*
- Introduce yourself, and state your relationship to the called party. This is necessary even if you answered the phone with your name, because when the caller didn't hear the name of the person being called, yours was probably promptly forgotten. This step establishes you as a source of help.
 - *"My name is Tanya, and I work with Mr. Phillips."*
- Ask the caller how you can help.
 - *"How may I help you?"*

This step is very important. If you ask a closed-ended question such as *"Can I take a message?"*, the response might be *"No,"* which is one of the two possible answers to that question. You don't want a "no" answer—this might be a business prospect. The open-ended question shown as an example above in effect says, *"I will help you. I just am not yet sure how I'm going to do so until you tell me!"*

Also, notice that the question didn't mention "message" at all. Putting yourself in a service mode opens the door to you being able to deal with the caller's issue directly.

A Phone Number

When leaving a message, some callers will say, *"Oh, he's got my number."*

That might be, but try to put a number on each message.

"I'm sure he does. But for easy reference, could you run it by me again?"

"Thanks."

- Take the time to take the message correctly.

Many message takers might assume that when the call is returned, the details can be filled in. So they take a minimal message of name, number, and time.

Imagine that you're running a meeting that's very important, and receive a message that Bill will not be attending. You might get angry with Bill. After all, he's known about this meeting for weeks. But what if the actual message had been, "*Bill's wife gave birth to a son early this morning. Bill is at the hospital and won't be able to make the meeting.*" Do you feel differently now? Take the time to get the entire message.

- Assure the caller that the message will be delivered.
 - "I'll see that he gets this message."
 - Don't say, "I'll have him call you." You have no control over that.
- Ask the caller for permission to put him or her into voice mail only if there is a reluctance to leave a personal message. If the caller asks for voice mail, of course, you won't ask for permission.

Incoming Calls When You're With a Customer

Sometimes the phone rings while you are working with a customer. The customer often warily eyes the phone, wondering if you are going to leave to answer it.

Many businesses seem to have the attitude, "*The phone won't wait—but you're already here and you will wait.*" So they answer the phone whenever it rings. The customer may wait this time, but may never come back.

In the earlier section, *Before the First Call*, backup or secondary phone answerers were described. A system of this type, which allows you to stay with your "live" customer when the phone rings, is the best approach. Call Receptionists are also a good response in some dealerships.

If that is not possible, and if the phone does not have an automated attendant, you will have to answer the phone. How you do so and what you say to the customer will largely determine how the customer feels about it.

- Apologize for the interruption. Tell your customer that you'll be right back.
- Use the first part of the standard phone greeting, but after your name state that you're with a customer. Then provide the caller with the choice of voice mail, message, or call back.
- If the phone is ringing persistently, you must find someone else at the dealership to either answer the phone or to work with your customer.

What to Do When You Don't Know What to Do

You are human, and won't know everything about the issues that callers raise. Sometimes, you might not even know who to transfer a call to, especially if you're new at the dealership. Consider a few simple things to do.

- Be willing to admit that you can't immediately answer the question. But, avoid the Forbidden Phrase, "*I don't know.*" Instead, say:
 - "*That's a good question. I'm going to have to find out about that.*"
- Establish someone within your dealership who can provide you with names and details for many of the issues that arise. Use this person or persons as an information resource, even if you know they're not able to directly help the caller.
- Follow up when you've transferred responsibility for the caller to another person who is able to answer the caller's questions. Find out what the answer was, so that you'll be prepared to answer it yourself the next time it arises.

Summary

A number of techniques were demonstrated in this section, *Incoming Calls*. They provide some basics that, if used, represent a good beginning to exceptional handling of incoming calls.

- Provide clear information to the caller. Use positive statements, not negative ones.
- Reread the Forbidden Phrases. Decide which of them "sound like you," and make an effort to replace them.
- When you have to transfer the caller to another person, tell both parties exactly what is happening and why.
- Do each of these things in a friendly and empathetic way. Remember to smile before you pick up the phone.

Think of answering the phone as greeting a friend at your door.

Think of transferring a call as introducing one friend to another.

Think of putting a caller on hold as asking your best friend to wait for you.

Take a message as if your job depended on it. To the extent it will help the business grow, it just might!

After the Call

Meeting Commitments Made on the Phone

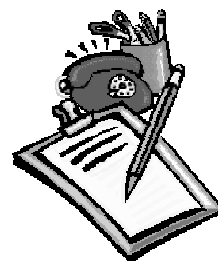
The business that you conduct on the phone is not always finished when the call is completed. Often you have made commitments to the caller to find additional information, or get an answer to the caller's question.

Callers don't like to be told, "*I'll have to get back to you.*" Most are reasonable, and know that at times you have to do some research, or talk to someone who isn't available when they call. But many have experienced similar situations when the commitment to respond was not met. Their expectation is that there is a good chance you won't get back to them when promised. So, it is critical that you respond to the customer by the time you agreed to do so, *whether you have found the answer by then or not*. Three steps will allow you to consistently exceed the expectations of the customer.

- Make the commitment to respond specific. Name the date and a time frame. Make sure that your commitment is realistic for you to achieve, but avoid stretching it to give yourself "plenty of time." Adopting such an approach will turn it into a habit, and you will find yourself stretching your commitments further and further, until your customers start to object.
- Select a system to remind yourself that you have an obligation to respond. Examples of systems are:
 - Post-it® Notes
 - A calendar that is used solely for these commitments
 - A spiral bound notebook that enables you to cross off tasks that have been completed
 - A computer program

Whatever you choose, use it consistently!

- If for any reason your response time arrives and you still do not have an answer for the caller, *call anyway*. Apologize for and explain the delay, then renegotiate a time to call that is acceptable to the customer.



The Morning Drill

The adoption of an organized system, such as the examples listed at left, is a first step.

Equally important, but sometimes forgotten, is to *use it*.

Establish a routine. For example, start every day with a review of phone messages, or your spiral notebook.

Coaching Others on Their Phone Skills

The success of every employee at your dealership depends on the dealership's success. For your organization to thrive, employees should pursue opportunities to help each other by finding better ways to get work done. Coaching, both supervisor to employee and peer to peer, is one of those opportunities.



Finding Opportunities

Coaching opportunities are best found by informally observing people on the phone from time to time. If the intent of the observation is to identify ways to get better, and to grow, then everyone can become more willing to engage in the ongoing organizational examination that coaching implies. There are several perspectives on people that are used by successful coaching organizations.

- People are competent. They can evaluate their own performance and work out solutions to issues that they are aware of. A coach's job is to raise the awareness.
- Learning and growth are valuable to the organization, and are every employee's responsibility.
- Growth comes from collaboration and working with each other.

All employees can adopt these ideas, which then guide the observation and coaching activities.

The Coaching Method

The best methods of coaching use the ideas above. They are, for example, ways to *raise awareness*, not ways to correct performance. They are used by everyone, especially in peer-to-peer interactions. The skill set might look like this.

- When you observe a behavior that could be improved, find out if the person is ready for coaching. Suggest how coaching could benefit the person.
 - *“Have you got a few minutes to talk about that last phone call? You look pretty frustrated, and I would guess you’d have preferred that it went better than it did.”*

- State exactly what you saw. Avoid using language that can create defensiveness. Stick to the facts.
 - *“Whatever that caller said seemed to make you very angry. I thought you did a great job in responding with the right words, but I could really hear in your tone that you were upset.”*
- Ask the employee what he or she thinks about your observations, and/or what they could do differently next time.
 - *“What do you think you might have done differently?”*
- Offer your ideas and your help.
 - *“I find it helpful to always remember that the caller isn’t angry with me. And sometimes I try to think of times when I’ve been the angry caller, and what it would have taken to calm me down.”*
 - *“If there’s anything I can do, or if you just want to talk about a call, let me know.”*

While the coach may offer suggestions, this method does not tell the employee specifically what to do differently (that approach might be used in disciplinary situations, or if the person being coached specifically asks for ideas about what to do differently). Instead, the coach works with the employee on the assumption that the employee has the ability to deal with a problem that he or she is made aware of.

Calling Out

Many of the same skills used to answer a phone call apply when making a call.

Calling a Customer

When you place a business call, you are representing your company. So you should extend the same courtesy of providing the kind of information you provide when you answer a call.

- Unless you personally know the person you are calling, identify yourself and your organization by name.
 - *“Hello, Mr. Leonard? This is Paul Edmunds from Champion Sterling Parts.”*
- Use an appropriate non-business conversation starter. This helps ease the person you’ve called into the conversation without an abrupt transition to business-talk. This will vary in length, from a short phrase to a short conversation. In all cases, let the person you’ve called take the lead.

In the conversation shown on the left below, the person being called “took the lead” by not continuing the non-business conversation starter past a simple *“I’m OK.”* So, the caller immediately moves to the business purpose of the call.

In the other conversation shown on the right below, the person being called responds with a few questions and a comment about fishing. The caller responds until there is an appropriate opportunity to “sum up” the non-business conversation and move to the purpose of the call.

“How are you today?”

“I’m OK” [silence].

“I’m calling to check your inventory of....”

“How are you today?”

“I’m OK, how are you?”

“Good, thanks.”

“Isn’t this weather something?”

“I sure hope it continues to the weekend!”

“Me too, I want to get some fishing in!”

“Sounds great! Mr. Leonard, I’m calling to check your inventory of....”

- Conduct your business. State exactly why you have called, and, if appropriate, what you expect to accomplish with the call.
 - *“I’m calling to check your inventory of alternators. We’ve just started supplying a new model, and I want to make sure you’re covered.”*
- Always end with a non-business conversation element.
 - *“Thanks for your time. Have a great day. And, by the way, good luck fishing!”*

Making a Call to Someone's Voice Mail

It seems that more and more of our calls today end up in voice mail. Sometimes that can be frustrating. But an effective message sounds professional, and might encourage the receiver to return your call more promptly.

Have you ever received a voice mail message that sounded like this message looks?

Hey Fred Bob here. Call me 689-7824

This message was probably as hard to hear as it was for you to read. There are two problems here.

- The message was spoken far too rapidly. While the speaker may think he or she is being efficient, the effect comes off as rudeness, since you often have to rewind the recording tape several times to get the complete message.
- There is almost no information, except that Bob called, and his number. You will have to return the call “blind,” without knowing its purpose. So you can't be ready for Bob's request. That may result in a third and unnecessary call.

Speaking clearly and giving your phone number slowly is one solution when you're leaving a voice mail message. Providing the reason for your call, to enable the receiver to make an informed return call, is another. Here are some additional tips when leaving a voice mail message.

- Think about what you want to say in your message before you pick up the phone. A message that stammers and wanders all over the place does not sound professional.
- Use the same tone of voice that you would use when you are actually talking to a person. Don't allow your tone of voice to sound like you're reading a script.
- If there is a deadline for returning the call, state it. If you'd prefer a return call in a certain window of time, request it.
- Voice mail systems today date and time stamp the message. Giving that information is no longer necessary.
- If you're calling someone who doesn't know you, repeat your name and number briefly at the end of your message. This can be said more quickly—it serves as a check that the person copied the number correctly.
 - *“Hi Ms. Bass. This is Norm McLaren of Champion Sterling. I'm at 222-555-1212. I called to discuss your purchase order 35823, specifically to confirm the model number of the transmission. I'll be in the office this afternoon between 2 p.m. and 4 p.m. and look forward to your call. If that's not convenient, leave a message with a good time for me to return your call. Again, this is Norm McLaren, 222-555-1212. Have a good day.”*

This may seem unnecessarily long at first, but this message does a lot more than say, “I called—call me.” It actually begins the business discussion so that when Norm and Ms. Bass connect, they're well on their way to resolving the issue.

Controlling Calls

The Conversation That Goes All Over the Map

Sometimes callers shift from topic to topic, or go off on a subject that really has nothing to do with the business at hand. These wandering conversations can help build a stronger relationship with the customer, but usually take time from your day that you don't have available.

In these cases, you need to regain control of the conversation. That can usually be done by interjecting a courteous non-business comment into the conversation that is related to what is being said but still steers the discussion back to where it belongs. Do not abruptly move to a business conversation element.

Customer: "I need a new alternator for my truck. You know, it's a good thing it gave out here in town. I wouldn't want to be caught on the road with a busted alternator. That happened to me a few years ago with my other truck and let me tell you, it wasn't easy. Took me almost a full day just to find the part. Then I had to get it installed. Man, that was tough."

You: "Yes, that can be frustrating. Fortunately, Freightliner has hundreds of dealers nationwide, any of whom can help you. Now, what's the part number on that alternator?"

If a connecting thought cannot be made to the rambling conversation, just use a polite expression such as:

Customer: "...Then I had to get it installed. Man, that was tough."

You: "That sounds like it was tough. But you're probably anxious to get the new alternator. Do you have the part number?"

Influencing Skills

When you call a customer with the intent to sell products or services, telephone-influencing skills are important. There are four steps to improve your chance for the result you want.

- If you can, decide what is the primary motivator of the person you're trying to influence. Is it cost? Quality? Availability? Time? Sometimes you don't know the person well enough to determine this before the call. In those cases, ask.
- Explain your proposal, and how it will benefit the person you're calling.
 - *"Having better information readily available could really save us both a lot of time."*
- Ask for a reaction.
 - *"What do you think of that approach?"*
- Deal with objections, and agree on a plan of action.
 - *"It really should take no more than 20 minutes a week. Let's try it for a few weeks and talk again."*

Using Telephone Technology

Modern phone systems provide a great deal of flexibility and convenience. Those benefits, however, should not be excuses to use poor telephone technique.

Speakerphones

Callers on the other end always know, or at least sense, when you are using a speakerphone, and it usually makes them uncomfortable because they don't know who is listening to the conversation. Speakerphones have great value, for example in calls involving a group or groups of people. They should not be used solely for your convenience, however, since there is a risk of the person on the other end reacting poorly.

- Never use a speakerphone to answer or place a call. The first words between you and the caller or the person you're calling should always be between you and the other person.
- Always get permission if you wish to place the other party on speakerphone, and give a reason for doing so.
 - *"Mr. Ross, my supervisor just came into the room and I'd like him to hear what you've told me. May I put you onto our speakerphone?"*
- When using a speakerphone, make sure that all members of the group identify themselves. Ask those who are talking by phone to the group to preface all comments with the name of the person to whom the comment is being addressed.
- Never end a call on speakerphone. The primary or host member of the group should pick up the phone and end the call with a non-business conversation element.
 - *"Thanks for your input on this call. It really helped. We'll get back in 3 days. Meanwhile, enjoy your week!"*
- Consider using your speakerphone when the party you're calling puts you on a long hold. Doing so enables you to free your hands for productive work. When the other party comes back on line, state that you're going to switch to the handset.
 - *"Hi, I've had the speakerphone on. Give me a second to switch to the handset."*
- If you wish to get someone you're calling off the speakerphone, politely ask that they do so. Let the other party explain why a speakerphone is necessary. Then you can ask who is present on the other end.
 - *"Mr. Davis, I'd really appreciate it if you'd pick up the phone. I'll be able to understand you better."*

Cellular Phones

Cell phones certainly add a great deal of convenience to your business day. You are available virtually anywhere, and can make calls easily. Cell phone issues relate to two areas—courtesy and safety.

Courteous Use of Cellular Phones



- Don't use your cell phone in places where you will annoy others, such as restaurants. Never talk loudly. If you need to do either, step outside and away from others.
- Have a backup system that will receive messages when your battery is low or you are in a low signal area. This might be a cellular voice mail system, for example.
- Within the first sentence or two of conversation, tell people who you call that you are on a cell phone. Explain what you will do if the signal is lost; usually, you would call them back.
- Turn off your cell phone in meetings and in public areas where the ring would be inappropriate (concerts, for example). Most phones can be adapted to vibrate instead of ring, or you may use a voice mail system obtained through your cellular carrier.

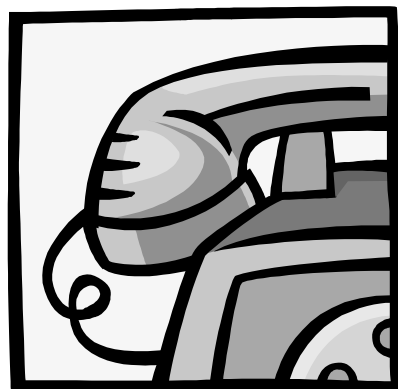
Safe Use of Cellular Phones

- Some areas now prohibit the use of cell phones while driving a car. Even if they don't, cell phone records are often reviewed when insurance investigators are trying to determine the cause of an accident. (The records don't lie, by the way. If you're involved in an accident while using your cell phone, admit it).
- If you frequently call while driving, consider these ideas.
 - Use a speed dialer or voice-activated phone for the numbers you frequently call.
 - Use a hands-free phone cradle and earphone.
 - Practice dialing without looking at the phone, so that you can keep your eyes on the road. It's the same as using a calculator and can be picked up fairly easily.
 - Have a passenger dial for you.
 - Pull over. This is especially important for longer phone calls, or for calls such as sales presentations. Allow your brain to concentrate fully on the call if it is important.

Summary

Several years ago, an informal survey sponsored by *USA Today* asked people what “bugged” them about telephones. This course has covered seven of the top vote getters (“hang ups” and “call waiting” are not major business call phenomena).

1. Being put on hold
2. Answering machines
3. Poor call screening
4. Call waiting
5. Mouth noises
6. Not paying attention (listening)
7. Hang ups
8. Answering machine
9. Bad attitude, rudeness



Eliminating these issues in your business doesn't take a lot of effort. And it will make a significant contribution to the growth of your business.

- Remember that when you answer the phone, or make a call, you represent your dealership.
- Use common courtesy. Be free with the use of your name and use the name of the caller.
- Put aside other things that you were doing, and concentrate on the caller. Think about the caller's issues, not how those issues are affecting you at this moment.
- Ask permission and wait to get it before inconveniencing the caller, for example, by putting him or her on hold.
- Take responsibility for the caller's issue, even if you can't personally solve it.
- Provide to each caller and person you call the same information that you would like to have if the roles were reversed.
- Exceed people's expectations. That's the only way to truly differentiate your business from your competition.

Glossary

Automated Attendant	An automatic message and menu system that answers incoming calls to the business.
Blind Transfer	A call transfer where neither the caller or person to whom the call is transferred are given any information about what is happening.
Business Conversation Element	Any phrase directly related to the purpose of the call, intended to meet the business expectations of the caller.
Communications Kit	A varying set of “tools,” such as notepads and lists that are next to and support the use of the telephone.
Company Jargon	An internal “language,” often expressed as acronyms or abbreviations, which facilitates communication between employees.
Central Issue	The reason for overly emotional behavior of a caller.
Primary Business Service	The purpose of a job or organization. The work that is done.
Customer Expectation	The conscious or subconscious desires of the customer when interacting with a business.
Distracting Mannerisms	Any sound or activity done while on the phone that distracts or annoys the caller.
Forbidden Phrase	Any phrase that should be avoided in a conversation with a customer.
Hold Message	A message heard by the caller when they are put on hold.
Instinctive Skill	A well-practiced skill that can be used with conscious thought.
Internal Customers	Anyone within the business to whom information or material is provided to help them do their job.
Non-Business Conversation Element	Any phrase not directly related to the purpose of the call, intended to make the caller feel more comfortable.
Open-Ended Questions	Any question that cannot be answered with a <i>yes</i> or a <i>no</i> .
Service Provider	Anyone who interacts with a customer on behalf of the business.
Voice Mail Greeting	A personalized message answering the calls of an individual.

Certification Questions

1. When screening calls for someone else, which is the best *first* response following the caller's request for the other person, assuming he or she is available?
 - a. "May I have your name?"
 - b. "What company are you with?"
 - c. "Thank you."
 - d. "What is your call about?"
2. What feature should any automated attendant message have?
 - a. It should be short.
 - b. It should be negative.
 - c. It should be long.
 - d. It should be positive.
3. What is an *open-ended question*?
 - a. One that can be answered by a *yes* or a *no*
 - b. One that cannot be answered by a *yes* or a *no*
 - c. One that has no apparent answer
 - d. One that opens the door to new issues
4. How should any call start and end, respectively?
 - a. With a business element and non-business element
 - b. With a business element and business element
 - c. With a non-business element and business element
 - d. With a non-business element and non-business element
5. What is the *most common* role of a backup phone answerer?
 - a. Answer calls after a specified number of rings
 - b. Answer calls only when the business is closed
 - c. Answer calls after a certain time of day
 - d. Answer calls on specific days
6. To whom should you provide full information when transferring a call?
 - a. To the caller but not the recipient of the transfer
 - b. To the recipient of the transfer but not the caller
 - c. To both the recipient of the transfer and the caller
 - d. To neither the recipient of the transfer nor the caller
7. For which circumstance is the use of a speakerphone *always* appropriate?
 - a. While on hold
 - b. To begin a call
 - c. To end a call
 - d. When you're busy with other things

8. Who are you to the customer when you pick up the phone?
 - a. The Receptionist
 - b. Your dealership, and the truck brands it represents
 - c. The message taker
 - d. Whomever you tell them you are
9. After taking a message, what is the correct statement to make?
 - a. "He (She) will return the call soon."
 - b. "He (She) will return the call ASAP."
 - c. "I'll see that he (she) returns the call."
 - d. "I'll see that he (she) gets the message."
10. What *usually* happens when a customer's expectations are NOT met?
 - a. They will not complain to you.
 - b. They will complain to you.
 - c. They will do nothing.
 - d. They will understand.
11. While listening, when is it OK to use "uh-huh" or a similar phrase?
 - a. Never
 - b. Repeatedly
 - c. Occasionally
 - d. Only once
12. Which of the following is an appropriate responsibility of a phone answerer?
 - a. Transfer the call immediately.
 - b. Get to business right away.
 - c. Determine the customer's needs.
 - d. Decide what the customer wants.
13. What is a central issue?
 - a. Any issue related to the central business
 - b. The reason a caller is emotional
 - c. Someone in the middle of a problem
 - d. The primary solution to a problem
14. When you don't know the answer to a question, which is the most appropriate response?
 - a. "I don't know."
 - b. "I'll find out."
 - c. "This is my guess."
 - d. "I'm pretty new here."

15. What do listeners who are “*other oriented*” do?
- a. They orient themselves to their other work.
 - b. They orient themselves to other things they could say.
 - c. They orient themselves to other issues.
 - d. They orient themselves to what the caller finds important.
16. How are variations in call volume usually found?
- a. Listening in
 - b. Counting the rings
 - c. Checking the phone bill
 - d. Keeping a log of calls
17. What is “primary business service?”
- a. Copier and computer service
 - b. Service to primary employees
 - c. Primary reason the business exists
 - d. Service to primary customers
18. When answering a call, you say, “*Hello. This is Champion Sterling, parts department.*” What do you say next?
- a. “What may I do for you?”
 - b. “Thanks for calling.”
 - c. “Can I take a message?”
 - d. “My name is ...”
19. Which is best for the “hold” message?
- a. Nothing
 - b. Business related
 - c. Music
 - d. Newscast
20. How long do you get to make a good first impression on the telephone?
- a. 2–4 seconds
 - b. 4–6 seconds
 - c. 15–30 seconds
 - d. 30–60 seconds
21. What is the highest level of customer satisfaction that can be achieved with perfect primary business service?
- a. Meets expectations
 - b. Does not meet expectations
 - c. Somewhat exceeds expectations
 - d. Strongly exceeds expectations

22. How many muscles does it take to smile, and how many to frown?
- a. 17 to smile and 43 to frown
 - b. 43 to smile and 17 to frown
 - c. 13 to smile and 47 to frown
 - d. 47 to smile and 13 to frown
23. A caller says, *I'm really fed up with the runaround I'm getting!* What is your best *next* response?
- a. "You sound really frustrated."
 - b. "What is the problem?"
 - c. "I wasn't here when it happened."
 - d. "Here's what I would do."
24. A caller asks, *"Is the part heavy?"* Assuming any of the following could be true, which is the most appropriate answer?
- a. "It weighs 30 pounds."
 - b. "No."
 - c. "Sort of."
 - d. "I don't know."
25. Within how many rings should 80% of the phone calls be answered?
- a. 1
 - b. 2
 - c. 3
 - d. 4