

Script for **Unit 4 – Appropriate Phone Etiquette For Different Scenarios**

s/n	Script
1.	<p>Welcome to the online learning of “Appropriate Phone Etiquette For Different Scenarios”.</p> <p>This is the fourth e-learning unit of "Represent Yourself &amp; Your Organisation Well With Voice Call Phone Etiquette”.</p> <p>You will learn to sharpen your practice of phone etiquette to manage varying situations.</p> <p>It highlights the barriers to communication in challenging situations.</p> <p>It emphasises the practice of phone etiquette and outcome-first attitude to steer the difficult conversation towards a more productive one with the aim to better manage these potentially negative moments of truth.</p> <p>“Represent Yourself &amp; Your Organisation Well With Voice Call Phone Etiquette” is a multi-part e-learning programme.</p> <p>It comprises of 4 learning units. You can choose to only take this e-learning unit, or to also take the remaining 3 e-learning units in no particular order.</p> <p>You may view the synopsis for each of the e-learning units.</p>
2.	<p>If you had taken Unit 2 Phone Conversations Go Wrong, and Unit 3 Phone Etiquette You may recall the importance to meet your customer’s expectations, With the practice of outcome-first attitude</p> <p>That your words and actions must demonstrate responsiveness, accuracy, appropriateness and accountability.</p> <p>And these qualities are evident in your practice of phone etiquette, that is Your tone of voice, your choice of words, your listening skills, and your probing skills.</p> <p>Outcome-first attitude and excellent phone etiquette is to be practised from the start to the end of your phone conversation with your customer.</p>
3.	<p>Delivering bad news is never pleasant and you may be anxious about being the bearer of bad news, and how interactions with your customer will unfold for this critical touchpoint fearing it may give rise to a negative moment of truth which breaks the customer’s experience.</p> <p>This scenario is an outbound call, meaning you will be making the call to your customer.</p> <p>Delivering bad news for an inbound call meaning you receive a call from your customer will be covered when we get to the scenario of “Saying No”.</p> <p>Ensure that you are well prepared prior making the outbound call.</p> <p>Structure and visualise how you will be sharing the information and delivering the bad news to your customer.</p>

	<p>Put yourself in the position of your customer. Imagine what his or her concerns would be and get ready the information to offer explanation or provide clarification</p> <p>Now, you will need to practise outcome-first attitude and excellent phone etiquette From the start to the end of the phone conversation.</p> <p>At the point of “Picking up”, your practice emphasises on Accountability because you are tasked with the responsibility.</p> <p>To reach your customer successfully, and deliver the bad news, you may need to try repeatedly, at different timing, or leaving voice mail or send an email to inform your customer that you would need to speak with him or her over the phone.</p> <p>At the point of “Greeting”, your practice emphasises on Accuracy. Imagine you getting your customer’s name wrong or mindlessly said good morning when it is already afternoon.</p> <p>It may seem petty, but such carelessness would cast doubts on your professionalism And negatively impact your customer’s receptiveness to what you will be saying Getting the basic correct is therefore a given, and it is to be coupled with a warm and confident tone of voice, to exude confidence</p> <p>At the point of “Exchanging Information”, your practice necessitates you to demonstrate all qualities, that is, Accuracy, Accountability, Appropriateness, Responsiveness.</p> <p>You are tasked to deliver the bad new correctly, and in a manner most appropriate for the circumstances and your customer in a clear and organised manner to established shared understanding.</p> <p>It is important to use positive phrases and not further aggravate the situation Or avoid triggering your customer to get him or her worked up use active voice to positively portray accountability that you, who is representing your organisation, is doing your best for your customer.</p> <p>You need to practise empathetic listening. Especially if your customer needs to vent his or her frustration as well as active listening to non-spoken cues, like quick shallow breathing, or silence which may mean your customer is worked up or needs more time to process what you have said</p> <p>And is not ready to continue this means you may need to have more or longer pauses. A good practise is to ask your customer if he or she is ready to continue And not simply carry on as it may appear as if you are disregarding his or her feelings And focusing only on closing the phone conversation as fast as possible.</p> <p>If your customer shares more information, then you need to practise the typical probing skills to ask open-ended questions, to paraphrase and check understanding so you may follow-up on the necessary on a later date.</p> <p>At the point of “Ending”, your practice emphasises on Accountability. To be accountable and take the necessary steps to conclude</p>
--	---

	<p>To be responsible for the steps forward. Your tone of voice must remain warm and assuring to exude confidence as well as build rapport.</p> <p>Personalised and contextualised words may help.</p> <p>For example, using the same expressions or phrases used by your customer You echo what he or she has said and your customer may feel that you have given attention and acknowledgement</p> <p>This may work to reduce the resistance from your customer as well as get his or her buy-in that you and your organisation works hard for this valued relationship</p> <p>You may need to summarise to recap what is said. You would need your customer to affirm that he or she understands what is said, and the next steps to take.</p> <p>This can be done either with a close-ended question, for example, “are you clear about what we have just talked about?” or with open-ended question, for example, “will you be able to tell me, in your own words, what we have just talked about?”</p> <p>This means your customer will paraphrase, and you then validate if there is shared understanding.</p> <p>You may wish to print this cheatsheet for quick reference.</p>
4.	<p>As the saying goes, “Bad news is best served with a side of honesty and empathy.” As you practise outcome-first attitude and excellent phone etiquette to deliver bad news, you may wish to consider the various ways to approach it.</p> <p>Let us use the example of your customer renewing car insurance with your organisation.</p> <p>The bad news to your customer may be the result of a mistake which occurred Because you did the calculation wrongly and gave a lower quotation which is invalid. As you practise Outcome-first Attitude and excellent Phone Etiquette to break the bad news to your customer, you may wish to admit readily to the mistake you made</p> <p>And apologise sincerely for the inconvenience you have caused because your customer now gets the correct quotation which requires him or her to pay more. In such cases, it may not serve your organisation’s best interest to sugarcoat the bad news or be ambiguous about the mistake made.</p> <p>Rather, a transparent approach may demonstrate high integrity and accountability in how you and your organisation conducts its business.</p> <p>This can help pacify your customer and build rapport and may avert escalating a critical touchpoint to a negative moment of truth, whereby the customer decides not to purchase the car insurance from you.</p> <p>The bad news to your customer may be the result of a mistake which occurred Because he or she forgot to give confirmation, which resulted in a lapsed quotation.</p>

	<p>As you practise Outcome-first Attitude and excellent Phone Etiquette to break the bad news to your customer, you may wish to use the ‘Sandwich’ approach.</p> <p>Start by thanking him for considering the quotation favourably inform him that the new quotation now costs more then reassure him that all the promotional discounts and benefits are included to offer him the best quotation.</p> <p>In such cases, it is not advisable to dwell on your customer’s mistake. Rather, focus on building rapport and professionalism to provide solution that best serves his or her needs while trying to convert this critical touchpoint to a positive moment of truth, thus achieving win-win.</p> <p>The bad news to your customer may be a pricey quotation. Because higher costs were levied by the car repair workshops. As you practise Outcome-first Attitude and excellent Phone Etiquette to break the bad news to your customer you may wish to state plainly the facts of the situation and reassure your customer that he will enjoy best value for the quotation.</p> <p>While your organisation will continue to represent loyal customers like himself or herself, to negotiate for best coverage and benefits.</p> <p>You may wish to print this cheatsheet for quick reference.</p>
5.	<p>Saying no can be unpleasant because you may feel bad about it as well as find it hard to overcome your customer’s resistance to get his or her agreement about the decision made by your organisation</p> <p>You may be anxious how interactions with your customer will unfold for this critical touchpoint fearing it may give rise to a negative moment of truth which breaks the customer’s experience.</p> <p>You get time to prepare for saying no for an outbound call. Similar to the earlier scenario about delivering bad news. For inbound call from your customer, you are likely to take more time to process, think through, and take relevant and correct steps before you can say no to him or her.</p> <p>At the point of “Exchanging information”, your practice necessitates you to demonstrate all qualities, that is Appropriateness, Accuracy, Accountability, Responsiveness.</p> <p>This is because your customer has in mind a desired solution or actions which he or she is expecting to hear yes from you. You have got to listen, probe with right choice of words and tone of voice before you arrive at the point where you say no to your customer Else, your customer may feel that you have not taken appropriate steps or does not have confidence in you giving him or her correct advice and solution.</p> <p>Being structured and organised as you listen and ask questions assures your customer that you are taking a holistic and systemic approach towards correct and</p>

	<p>clear understanding of the full picture and careful consideration of all factors, to propose the best actions to take.</p> <p>Using active voice and positive phrases demonstrate accountability, and encourage good talk, especially if you need to encourage your customer to evaluate and assess possible options rather than just informing a firm decision without grounds of negotiation and lacking to assure your customer that you have his or her interests at heart.</p> <p>Even if the scenario is about communication a straightforward and unquestionable no, you must practise good choice of words and tone of voice, with empathetic listening skills with the aim to establish shared understanding with your customer. Bringing down his or her resistance, avoid triggering more frustration or anger. Is a step forward to getting his or her agreement that the decision is a No.</p> <p>At the point of “Ending”, your practice emphasises on Accountability To be accountable and take the necessary steps to conclude To be responsible for the steps forward. Your tone of voice must remain confident and assuring to also exude warmth and build rapport. Personalised and contextualised words may help, like using the same expressions or phrases used by your customer to echo what he or she has said and your customer may feel that you have given attention and acknowledgement Even if at the end of the day, the decision is still a no, you need to practise empathetic listening if your customer continues to vent his or her frustration.</p> <p>Likewise active listening to non-spoken cues, like quick shallow breathing, or silence Which may mean your customer is worked up or needs more time to process what you have said and is not ready to continue.</p> <p>So more or longer pauses may be necessary. A good practise is to ask your customer if he or she is ready to continue and not simply carry on as it may appear as if you are disregarding his or her feelings and focusing only on closing the phone conversation as fast as possible. You may need to summarise to recap what is said and for your customer to affirm that a No decision is made with a closed question and paraphrase in his or her own words the next steps to take.</p> <p>You can then validate if there is shared understanding.</p> <p>You may wish to print this cheatsheet for quick reference.</p>
6.	<p>As the saying goes, “Treat the customer as if you are that customer” Imagine if your request had to be rejected, how would you want it to be communicated to you, so you feel less disappointed or frustrated.</p> <p>As you practise outcome-first attitude and excellent phone etiquette to say no to your customer, be sure to exhibit care, and to assure him or her that your organisation values the relationship and is in service of his or her needs.</p> <p>You may be using a combination of these ways during the same conversation.</p>

	<p>For difficult or more complex situation, it may take more than one conversation to successfully convince and seek agreement from your customer that it is a No.</p> <p>Let us use the example of your customer demanding to enjoy an exclusive promotion which already lapsed.</p> <p>A Nice No is to soften the blow and use a more positive spin with a genuine thank you and display of appreciation. Your aim is to demonstrate that you care about them and your organisation values the relationship even when you are saying No to him or her.</p> <p>An example may be:</p> <p>“We thank you for your support all this while. It has been a pleasure and we hope our product and services have served you well. It is great to know that you had wanted to purchase more from us during the exclusive promotion programme. However, we are sorry that ...”</p> <p>An Optional No is to create a workaround, to achieve your customer’s needs or request. It is not exactly what he or she wants but it is either similar to the desired action, or comparable to it.</p> <p>Your aim is to demonstrate that while you say No to the initial question, you strive for a win-win for your customer.</p> <p>An example may be:</p> <p>“We are sorry that you will not be able to enjoy buy one get one free because the promotion had ended. But here is what we can do, though the product is now back to its usual retail price. For you only, we will offer a one-time exclusive \$100 voucher, and it works out to be about 20% discount.”</p> <p>A Persistent No typically comes after an Explained No when you had exhausted all ways of reframing your No. Be honest about why you are saying no. Do not make up false excuses, or worst to lie about it. Admit that his or her request cannot be met and explain why that is the case. Never be ambiguous or leave your customer hanging indefinitely. Your customer may not understand what it is that you are doing, what you can or cannot do.</p> <p>At times, he or she may not feel assured that you have tried your best. So, take the time required to be thorough in sharing and establishing understanding, well building rapport that while you have said No, it is after doing all the necessary to assist and support him or her.</p> <p>Your customer may also think that you will cave in once he or she asks and asks repeatedly.</p> <p>So, do not be afraid to repeat yourself if you have to. At the end of the day, be prepared that your customer may be unhappy no matter what because he or she cannot accept anything except his or her own version of actions.</p>
--	---

	<p>At this point, reassure your customer that his or her voice matters, even if you cannot accede to the request. And offer the option to leave feedback. If there is a good idea or suggestion, document and evaluate it.</p> <p>You may wish to print this cheatsheet for quick reference.</p>
7.	<p>Please see examples of explained and persistent no for the same customer and scenario.</p> <p>Click on next when you have finished reading.</p>
8.	<p>Emotional customers fall into four general types – passive, talkative, demanding and angry.</p> <p>And the way to handle them is still to demonstrate outcome-first attitude and excellent phone etiquette, while paying more attention to your tone of voice and choice of words.</p> <p>Reasons being these customers are already worked up and your poor choice of what you say and how you say it may trigger them to make matter worst.</p> <p>At the point of “Exchanging information”, your practice necessitates you to demonstrate all qualities, that is Appropriateness, Accuracy, Accountability, Responsiveness.</p> <p>Your listening and probing skills need to remain effective to get through to your emotional customers and be able to gather information while ensure understanding from your customer on what you have said.</p> <p>Being structured and organised helps you take a holistic and systemic approach. Your emotional customer may rattle on or be extremely quiet so you need to have clarity on the questions you need to ask in order to achieve correct understanding of the full picture and careful consideration of all factors, to propose the best actions to take.</p> <p>Continue to use active voice and positive phrases demonstrate accountability, and encourage good talk. Remember that your emotional customer is overwhelmed with the situation and not feeling upset or angry with you. So do not take his or her venting personally. Practising empathetic listening skills hope to assure customer that he or she has your listening ears and the aim is to help bring down his or her level of emotions and move a step towards resolving the situation.</p> <p>At the point of “Ending”, your practice emphasises on Accountability To be responsible take the necessary steps to guide your emotional customer on the steps forward. You are to be confident while approachable while doing so to build rapport with your emotional customer and assure that you are giving attention to his or her needs and feelings.</p> <p>Active listening is just as important, to listen to non-spoken cues, like quick shallow breathing, or silence which may mean your customer may need more time to process his or her emotions before being able to process with what was said and the next steps to take.</p>

	<p>You will need to summarise to recap what is said. Get your customer to paraphrase in his or her own words the next steps to take Importantly, your emotional customer needs to affirm that the phone conversation can now be closed. If this is not done, he or she may feel displeased that you are not giving enough time and disregarding his or her feelings.</p> <p>You may wish to print this cheatsheet for quick reference.</p>
9.	<p>As the saying goes, “your customer doesn't care how much you know until they know how much you care”</p> <p>With a lot going on for an emotional customer, your words may not get through until he or she calms down. These emotional customers may behave so in a passive, talkative, demanding, angry manner from the start of the phone conversation. Or as the conversation progresses you will need to accurately recognise how your customer is feeling when it happens and tell him or her that you are giving your full attention to the distress he or she is feeling and assure that you will be doing your very best to understand and help with the situation.</p> <p>Also tell your customer to take the time required to share the situation in entirety What you are doing is giving the opportunity for him or her to vent or let off some steam, so he or she will be calmer when it comes to your turn to ask questions and probe.</p> <p>This applies for talkative, demanding, angry customers. As for a passive customer, there may be a lot going on but he or she does not say much Perhaps only to make occasional hurtful remarks, or subtly use sarcasm. So tell him or her that you will be asking questions in order to find out more about the situation, and encourage him or her to take the time required to think through so you can clearly understand his or her point of view.</p> <p>Doing these gives attention to your customer’s emotional state of mind. Getting their agreement to proceed is like having them commit to proceed with the next step in a less emotional manner,</p> <p>So the situation may be dealt with in a structured manner, to deal with facts and with accuracy.</p> <p>Please see some examples. Click on next when you have finished reading.</p> <p>You may wish to print this cheatsheet for quick reference.</p>
10.	<p>Practising the 3Rs technique is to explicitly demonstrate that you are paying attention to what your emotional customer is saying and pacing the conversation appropriate to the situation.</p> <p>So it will be a fruitful exchange between you and your customer. Repeat content is to pay attention to the key points your customer has said Then rephrase it in your own words to demonstrate acknowledgement and understanding and finally, to reflect feelings to attend to your customer’s emotional state.</p> <p>And use strategies to move away or keep those negative feelings in check</p>



	<p>In order work on the issue or situation in a less confrontational and more productive manner.</p> <p>Please read for Passive customers. Click on the arrow to read on the next emotion.</p> <p>Please read for Talkative customers. Click on the arrow to read on the next emotion.</p> <p>Please read for Demanding customers. Click on the arrow to read on the next emotion.</p> <p>Please read for Angry customers. Click on next when you have finished reading.</p> <p>You may wish to print this cheatsheet for quick reference.</p>
11.	<p>There is a lot of truth in the sayings,</p> <p>“Thank your customer for complaining and mean it. Most will never bother to complain. They'll just walk away.”</p> <p>“Your most unhappy customers are your greatest source of learning.”</p> <p>Yes, it is regrettable that unpleasant situations happen or that issues may not be fully resolved to the satisfaction of your customer which can lead to his or her need to file a complaint.</p> <p>However, remind yourself that a complaint is an invaluable feedback. It offers an opportunity for you and your organisation to improve its products and services, and to do better.</p> <p>Your customer may make an inbound call specifically to file a complaint. It may also happen while you are conversing with your customer that he or she feels the need to file a complaint, to get his or her views officially heard and looked into. Regardless of when this happens, you need to do well to avoid making your customer feel worse off or make the matter worst.</p> <p>Your excellent phone etiquette and outcome-first attitude are important. Just like when you need to deliver bad news, say no, or converse with your emotional customers. to ensure satisfactory follow up and follow through.</p> <p>Documenting information accurately and thoroughly ensures the case can be worked on with professionalism and swiftness.</p> <p>Especially in the case when it needs to be escalated to your fellow co-worker or supervisor</p> <p>This will be discussed in the next section.</p> <p>You may wish to print this cheatsheet for quick reference.</p>
12.	<p>When there is a need to change hands, for someone else to work with your customer on the issue or situation you have to ensure that your co-worker or supervisor gets all the help, to work on it swiftly and with greater ease.</p>

	<p>A summary gives a good overview, as well as the key points to note Share the information your customers has provided as well as the questions you have asked. This helps your co-worker or supervisor determine if there may be areas missing or lacking, which need to be probed further.</p> <p>Provide your assessment and views. This helps your co-worker or supervisor to see your point of view, along with your customer's point of view.</p> <p>The actions taken and the actions proposed, along with the reason of escalation will help your co-worker or supervisor determine the next step.</p> <p>Added information about your customer goes as long way to engage him or her successfully for the follow-up and closure.</p> <p>Examples may be: He or she prefers a follow-up email after the phone conversation, able to talk during evenings rather than during office hours.</p> <p>You may wish to print this cheatsheet for quick reference.</p>
13.	<p>Congratulations!</p> <p>You have successfully completed Unit 4 –Appropriate Phone Etiquette For Different Scenarios.</p> <p>If you wish to save a copy of the e-Learning script, please click on the link. We end with a reflection activity, so you can give more thoughts, to your practice of Outcome-first Attitude and Phone Etiquette which is specific to your organisation.</p> <p>Please click on the link to submit your reflection.</p> <p>We thank you and we wish you success in learning and applying the skills and know-how!</p>