
LEADER'S GUIDE

*This Leader's
Guide is For Use
With The Video/
Film Package.*

EFFECTIVE CALL MANAGEMENT

SALENGER FILMS^{INC}

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GENERAL INFORMATION

The video is designed to be shown with or without an instructor.

If instructor is used, the Leader's Guide beginning on page 2 provides a training outline.

TRAINING THEMES:

1. Leave a favorable impression with each call.
2. Control and manage the conversation.
3. Reduce telephone conversation time.

BENEFITS:

1. Improved service to customers and other callers.
2. Employees professionally manage each call.
3. Due to employee skill enhancement, job satisfaction increases.

The video covers important telephone techniques in a "how to" format. The topics are presented in the following order.

1. Handling the telephone
2. Listening
3. Managing objections
4. Answering the telephone
5. Your voice
6. Questions
7. Managing the assertive caller
8. Statements to avoid
9. Attitude

SUGGESTED INTRODUCTORY COMMENTS:

Explain why employees are being asked to watch.

Opening point to make: The service our company provides customers and other callers is (percentage), i.e., 90%, over the telephone. Therefore, how we manage calls and respond to customers/callers is very important.

Overall, I think we are doing a good job. However, a review of the basics of telephone conversation management and instruction regarding the more advanced techniques is always worthwhile. The video presents some excellent ideas on how to manage calls.

Or: I think we need some improvement. And a review of the basics of telephone conversation management along with instruction regarding the more advanced techniques will help all of us. The video presents some excellent ideas on how to manage customers and other callers.

Before we watch the training video, let me ask a question. If you rated the service we provide over the telephone on a scale of 1 to 10, how do you think we rate?

Option: Or ask how they rate their department or work unit. Compare that rating with employees' overall company service rating.

Use the board to draw a 1 to 10 line



Sample several or all employees, come up with an average rating, and then conduct a group discussion regarding the rating. Ask the following questions:

What is holding us back from being a 10?

Is there room for improvement in our telephone management of customers and other callers?

Do we always leave a favorable impression?

How do callers/customers rate our service?

SECTION**1:**

SECTION**2:****Introduction to Training**

SECTION**3:****Handling the Telephone**

Preceding each topic presentation a title appears for 4 seconds. This break can be used to interrupt the video for group discussion or leader comment. *However, it is recommended that the entire video be shown and then followed by comment and*

The video begins with four scenes of people handling calls. The calls are not managed well and present a view of common call management problems.

Key Points:

1. To leave a favorable impression, calls must be managed.
2. Successfully managing calls requires skill.
3. When you apply these techniques, calls becomes easier to manage.

Key Points:

1. Speak into the mouthpiece.
2. Place callers on hold before conducting a side conversation.
3. Understand the features of the telephone, i.e., transfer, etc. . . .
4. When you ask a caller to hold, wait for an answer because it's the courteous thing to do.
5. Allow customers to hang up first, because it's also the courteous thing to do, and it doesn't put the click in the customer's ear.

discussion. The titles are also an easy reference point for replaying particular topics.

The key points of each topic are listed below. On the right side of the page are suggested leader discussion points.

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During the showing of the video, note viewers reactions to the first four scenes. They may recognize the problems illustrated, i.e, call transfer, placing calls on hold, or scene 4 "I'm just the clerk." Follow up with discussion.

Theme for discussion: taking responsibility for (1) the caller when others are not available, (2) willingness to help the caller, (3) allowing a caller to answer the question "Will you hold?" or "Please hold?" before placing caller on hold.

No follow up required.

Key points are covered throughout video.

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Stress the importance of placing callers on hold before conducting a side conversation. "More than one customer's business has been lost because they heard something they shouldn't have." Always allow a customer to hang up first. Why? It's the courteous thing to do and doesn't put the click in the customer's ear.

Mention: These are small points but each adds to overall service and courtesy.

Point: Good service is not the result of just one thing we do but rather a combination of all that we do.

Ask the group how comfortable they are with telephone features. Do we expertly transfer a caller? Discuss any problems.

SECTION**4:****Listening****Key Points:**

1. Customers/callers only offer three types of expressions:
 - Statements
 - Questions
 - Objections
2. Each requires a response but first they must be recognized.
3. Listen for each one.
4. Failure to listen closely means:
 - We hear what we want to hear.
 - We hear what we expect to hear.
 - We will not recognize the difference between statements, questions, and objections.

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Re-emphasize key points. To be a good listener, recognize [write on board] STATEMENTS, QUESTIONS, and OBJECTIONS.

Ask group: If a caller says, in a normal voice tone: "You must be busy. Your phone rang 6 or 7 times before I got an answer." Is the caller making a statement or offering an objection? A statement! If a caller says: "I'm tired of waiting 6 or 7 rings before I get an answer." That's an objection. The difference: The second caller expressed dissatisfaction with the service. Ask group how they would respond to each. Response examples: first caller: "I'm sorry you had to wait. How may I help you?" second caller: I'm sorry about the delay. Then add one of the following: (1) Let me give you my direct number, (2) We have temporarily had more calls than usual, (3) We try to answer in three rings, I'm sorry you were delayed. Close with: How may I help you?

The video stated that failure to listen closely means we will hear what we want or what we expect to hear and not recognize the difference between statements, questions, and objections.

Point: Each requires a response.

Ask group if they agree. Ask: If you focused on statements, questions, and objections, would your listening improve?

Point: A good response cannot be offered unless we hear the customer/caller.

SECTION**5:****Managing
Objections****Key Points:**

1. Listen and recognize the objection.
 - If uncertain, ask for an explanation.
2. Immediately deal with it.
 - Don't talk over or ignore the objection.
3. Provide a positive response.
 - State what you can do, not what you cannot do.
4. Minimal conversation.
 - Stay with the facts.

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Ask group for the four steps of managing an objection. List on board. Emphasize that objections require an immediate response. Mention: (1) if the objection is ignored, problem isn't resolved. The customer or caller is left unsatisfied. (2) Don't talk over the objection, answer it.

Briefly describe two types of callers: passive and assertive. Both have an objection. If you ignore or don't resolve the objection, a passive caller may not say anything but will be left thinking about their objection. An assertive caller will stop you and demand an answer. In either case, the caller is not satisfied.

Write the word "ASK" on the board.

If you are uncertain as to what the objection is; ask. If you are uncertain if the caller is satisfied with your response; ask. When in doubt; ask.

Final point: Don't be so eager to satisfy a caller/customer that you promise something you can't deliver. Examples: short time frames, service that is not included, and promises that cannot be kept.

SECTION**6:****Answering the
Telephone****Key Points:**

The four answering courtesies.

1. Greet the caller.
 - Offer a good morning or good afternoon.
2. State your company name, department, or work unit.
3. Give your name.
4. Offer to help
 - May I help you?
 - or How may I help you?
5. Use as many of the four courtesies as possible, every time you manage a call.
6. It only takes 5 seconds or less to use all four.

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If you want employees to use ALL FOUR COURTESIES, you may have to sell the idea. They sometimes object because they feel it takes too much time. Write four courtesies on board.

SELLING POINTS:

- 4 or 5 seconds is all it takes. Demonstrate.
- It is courteous and something most companies do not do.
- Our customers and callers will like it.
- The first impression of our company comes from how we answer the telephone.
- We only get one chance to create a good first impression.

SECTION**7:****Your Voice**

SECTION**8:****Open and Closed Questions****Key Points:**

1. Voices can be improved.
2. Three factors that make up voice quality:
 - Energy: be aware of your energy.
 - Rate of speech: normal is 125 words a minute.
 - Inflection: to improve inflection emphasize key words.

Key Points:

1. Use questions to gain information, control the conversation, and to reduce telephone time.
2. Closed questions are designed to produce a short answer or a simple yes or no.
3. Key words used to phrase a closed question: DID, CAN, HAVE, DO, IS, WILL, and WOULD.
4. When confirmation or agreement is needed, use a closed question at the end of a statement, i.e.,
 - Can you do it?
 - Will that be okay?
5. Open questions are used when an explanation is required.
6. Open questions begin with these words: HOW, WHO, WHAT, WHEN, WHY, and WHERE.
7. Use open questions when you need explanation, and ask closed questions for more control and to reduce telephone time.
8. Using closed questions does not mean rushing the caller; instead use an organized approach that includes both open and closed questions.

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When talking with customers and other callers, it is important to speak with enthusiasm. Your voice energy level conveys enthusiasm.

Be aware of those late afternoon let downs. When tired, force yourself to pick up the pace by adding more voice energy and inflection.

Draw on the experience of the "high energy" employee.

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Most employees who have customer contact experience will state they understand the use of closed and open questions. They may, but probably do not use them well. These questions are effective in reducing telephone time, not only with customer calls but also with everyday internal calls. Ask the group for the key words that begin closed and open questions. Write on board:

CLOSED	OPEN
DID	HOW
CAN	WHO
HAVE	WHAT
DO	WHEN
IS	WHY
WILL	WHERE
WOULD	

ASK GROUP:

- What questions do you typically ask a caller/customer?
- Are they open or closed?
- How can you incorporate more closed and open questions into everyday conversations?

Point: Be careful not to over use closed questions. Two or three per conversation is usually plenty.

SECTION**9:****Managing the
Assertive Caller****Key Points:**

1. Several advantages in dealing with this type of person:
 - They know what they want.
 - Short to the point conversation.
 - They are businesslike and straightforward.
2. An effective method of dealing with assertive callers:
 - Slightly increase your assertiveness level but don't match theirs, stay just below the caller's level.
 - Be more direct in your statements by using:
 - Short, to the point statements.
3. Do not expect much rapport.
 - Assertive people are usually all business.

Key Points:

1. Theme: an impression is left with each statement made to a caller, think about what you say and the impression left.
 - Do not share problems with outsiders.
 - Do not share personal information about co-workers.
2. Closing the conversation
 - Instead of just saying goodbye,
Say: Thanks for your order. Thanks for calling. I'm glad we were able to help.

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Most employees have at least some difficulty dealing with assertive callers. Ask the group to describe their experiences. Someone within the group may be skilled at managing assertive callers. Draw on their experience. Match what the individual says with the action steps proposed in the video.

Review key points beginning with key point #2.

Suggest that the next time they are faced with an assertive caller they apply the steps. They work!

Remind the group that, because a caller is highly assertive, it does not mean he or she is upset. Some people just act that way. Don't take it personally.

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(Replay Section 10.)

Everything you say to a caller leaves an impression. Think about what you say and how it is said. (Cover key points.)

Ask group if they have heard similar statements within their group or department. Emphasize: Everything you say leaves an impression.

SECTION**10:****Commonly Used
Statements**

SECTION

11:

Attitude and Close of Video

Key Points:

1. Attitudes are all powerful
 - They influence everyone.
 - Determine the amount of job satisfaction we receive.
2. Be aware of your attitude.
3. Make a decision to be positive.
4. Attitudes are not fixed.
 - Make a positive choice.
5. Techniques presented in the video work.
 - Take the time and give them a try.

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The key point is the statement: **Your attitude is not fixed, it's your choice.** Promote discussion by asking what group thinks of statement. Do they agree? If so, why? Draw on the positive attitudes within the group. Stress the point: **You choose to have a positive attitude and often you make that choice several times a day. Ask for personal examples.**

Close: Providing good service to each caller is not an extension of your job. It is a very important part of it.

We talked about attitude and the fact that a positive attitude is a choice you make. The same is true regarding the quality of the service we provide customers and other callers.

When you get back to your job, you can choose to use the techniques we have learned about today or it can be business as usual. Let's make the right choice and start using these techniques. We want our service to be the best.

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