

It's Your Call

Trainer's Manual

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FOREWARD

This program is designed as a half-day group training session on dealing with customers over the telephone.

Just as the organisations that use this program are wide and varied, so are the desired outcomes of the participants attending. As a result, we have tried to make *It's Your Call*, as generic and flexible as possible.

This manual will provide you with background notes, along with practical activities and suggested running times. Feel free to add to or adapt the structure of this training session to suit your needs.

You do not need to complete all exercises provided unless they suit the specific requirements of your organisation. Of course, the time schedule we have provided is only a guide. The time spent on each activity is entirely dependant on the objectives of the trainer/facilitator and the progression rate of participants.

PREPARATION

In order to maximise the benefits of this training session, we recommend that the trainer/facilitator familiarise themselves with the topic at hand. You should be comfortable with the material in both this manual and the video.

You have been supplied with master copies of OHT's and participant handouts. Make sure that sufficient copies of each have been prepared prior to the training session.

In the training room you will need the following: -

Overhead projector or computer projection system

Monitor and VCR player

A whiteboard with markers and eraser

Note paper and pens or pencils for participants

SYNOPSIS

Lena works as a customer service agent in a busy entertainment booking call centre.

When she receives her quota sheet for the month she is horrified to see that the company wants her to keep up her number of calls while increasing the number of sales on a value added dinner package. From her point of view, she's already going as fast as she can.

To add to her frustration the very next call is from a delightful old man called George who wants tickets to a musical for his 50th wedding anniversary. George is completely inexperienced with using their service. He also believes that everyone must have plenty of time on their hands to listen to his stories about his wife's likes and dislikes, his time in the navy and how he felt about seeing the local butcher naked in the last production of "Hair".

Our story follows Lena as she learns valuable techniques for maintaining ownership of the call whilst staying friendly, interested and providing excellent customer service.

She shaves precious minutes off her call times, increases her selling skills and eventually wins the voucher for the free dinner for making the most value added sales.

Featuring

Marlo Groke as Lena
Charlie Barnes as George
David Buchanan as John

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COURSE STRUCTURE AND RUNNING TIME

This course has been designed to run as a half-day training session. If you do all of the course work within the allocated running time, your training session should run for approximately 4 hours.

COURSE WORK	RUNNING TIME
Part 1. Welcome & Introduction	15 minutes
Objectives & Agenda	10 minutes
Introduction	25 minutes
Part 2. Video & Discussion	30 minutes
Break	10 minutes
Part 3. Lead Discussion with OHT's	20 minutes
Activity 1	15 minutes
Part 4. Discussion with OHT's	10 minutes
Activity 2	30 Minutes
Part 5. Discussion with OHT's	5 minutes
Activity 3	15 minutes
Activity 4	15 minutes
Summary & Debrief	40 minutes

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PART 1

WELCOME AND INTRODUCTION

15 minutes

- Welcome all participants to *It's Your Call* training session.
- Introduce yourself and tell the group something about your training background.
- Explain how the training session is to be structured, how long it will run for, when the video will be shown, when breaks will be taken, what refreshments are available and where the phone and rest rooms are.

OBJECTIVES AND AGENDA

10 minutes

- Discuss the objectives and agenda of this training course with the group.

OHT #1

After completing the training session on *It's Your Call*, participants will understand the following: -

- What can be done to balance the quality verses quantity issues in the workplace.
- How important focus and concentration are to customer care.
- How to help the caller communicate their needs without sacrificing a friendly and interested attitude.
- How to keep customers focussed on their needs by listening for clues, using back on track questions and utilising options.

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- The importance of product knowledge.

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INTRODUCTION

25 minutes

- Using your own research and the brief notes provided below, give participants a brief overview of how important it is to keep control of the call.
- Invite questions and discussion from the group as you go.

NOTES

OHT #2 "You don't need to drive there, just call them."

How many times have you heard that in the last few years? Banking, shopping, booking events, changing information - inbound telephone inquiries are on the increase. Customer requests, which were previously handled through a network of branches, are now serviced on the phone. Business transactions, which were once taken care of by hopping in the car and going into a branch or outlet, are now being taken care of over the telephone. For most organisations this shift was a natural progression as technology streamed ahead, making it not only possible but very cost effective at the same time. However, do our customers always see the merit in this? Speaking to someone in Melbourne when your tap is leaking in Sydney takes a bit of getting use to.

The advantage for customers is increased access and in most cases a speedier completion of the inquiry at a reasonable cost to them.

The organisation can also be re-engineered so that either more information is available from one location or if necessary, highly technical or specialised requests can be addressed without a complicated run around. There can also be a rationalisation of operations. Because a telecommunications centre can be located anywhere, it's possible to have economies of scale, cost effective premises and central dispersion of information and training.

However, regardless of the cost savings in rationalisation, the most important function of a call centre is to serve customers. You are there to provide easy access to your organisation's services.

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Telephone customer service is arguably more difficult than dealing with customers in face-to-face situations. Developing a relationship with a faceless voice is not easy. However, the call centre industry is also shaping our expectations for how we conduct business. No matter what organisation you're in, customers are expecting to be able to do it over the phone (if they want to). Therefore, whether you are working in a call centre or involved in any service section of your organisation, the skills for handling customer service over the phone are essential tools for your career. The better you are at it, the more in demand your services will be.

As a customer service operator you essentially have three masters - your customer, your organisation and the standards of service you set for yourself. Finding the balance between the quality of customer service you are giving and the number of inquiries you are able to complete during your day is the key to setting your standards, which will make you successful in a busy call centre or office.

In order to find that balance, you must feel confident that you have mastered all the practical skills available to serve both objectives.

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PART 2

THE VIDEO

Play the video "It's Your Call"	15 minutes
Lead a short discussion around the video	15 minutes

Facilitator's suggestions: -

Is there anything about Lena's situation that you identify with in your own job?

What other sort of customers (besides the ones like George who like to chat) can make it difficult to complete your calls.

Answers: people who speak slowly, people who have difficulty with your language or are speaking in their second language.

George is unfamiliar with the booking service procedure and is unlikely to become a regular user so why is he important?

Answers: Word of mouth is one of the most powerful selling tools of any organisation. George sprouts off at the mouth about almost anything, so whether Lena's service was good, bad or indifferent, George is going to tell people about it - far better that it is good feedback that George is spreading to whoever will listen.

Even in the very beginning, what is it about Lena that suggests she already has the foundation for good customer service?

Answers: her body language is good, she smiles when answering the phone, she is "trying to do her best", her voice is well modulated, easy to understand and friendly.

PART 3

NOTES CONT

20 minutes

- Using the overhead transparencies and your own notes continue to lead the discussion encouraging participants to ask questions as you go.

Concentration is essential for phone work. Without concentration we tend to hear what we "expect to hear" and even what we "want to hear" rather than what is being said.

OHT #3

Give your full attention to the caller

Ensure your workspace is functional before you accept a call

Discourage interruptions from your associates

You must always begin your call by giving your full attention to the caller, making sure your workspace is functional before you accept a call.

You should also discourage interruptions from your associates by letting people know you will not speak to them while you're on the phone. It usually only takes one firm conversation to associates to keep them at bay while you're on the phone.

Keeping the customers you have a relationship with, will always be more cost effective than developing new relationships; and that means keeping customers happy every time they do business with your organisation. Providing excellent customer service over the phone essentially means three things: -

OHT #4

Help your customer communicate their needs

Guide them to make a decision

Fulfill their needs

'Back on track" questions

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Helping your customer communicate their needs, guiding them to make a decision and satisfying their needs. These will always be the key goals for your call.

Whenever you feel that the call is not serving these objectives you may have lost control. In the case of George, he not only wants to book his tickets, but he also want to chat and would happily stay on the phone to someone as friendly as Lena for half an hour. No one wants to purposely hurt George's feelings or dismiss him as too bothersome, because for the reasons we mentioned before, he will always be a valuable customer.

In these situations, the most effective technique to reclaim your call is "back on track" questions.

These are formulated by listening carefully and not just listening for interest's sake but listening for clues. They are usually closed questions, designed to elicit a yes or no answer and bring the conversation back to how you can satisfy the customer's needs.

OHT #5

Listen carefully
Listen for clues

Open questions invite a lengthy reply. They are only useful if you want to encourage the caller to talk and broaden a relationship. They often begin with how, what, where and why.

Closed questions encourage short answers - Yes or No or one word replies to options that have been offered. Did you ...? Would you like to...? Do you like the blue one or the yellow one best? Will Tuesday be suitable? Shall I make the booking for Wednesday?

OHT #6

Open questions invite a lengthy reply
Closed questions encourage short answers

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ACTIVITY 1

15 minutes

Formulating open and closed questions

- Divide participants into groups of six to eight and ask them to come up with six open questions and six closed questions for one of their customers. You might want to give them a customer scenario that is specific to their industry.
- Go through the responses on the whiteboard and discuss: -

Are they open or closed questions?

Are the questions appropriate for reaching the goal of satisfying the customer's need?

Do they keep the call on track? Discuss.

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PART 4**Continue to use overhead transparencies.****10 minutes**

Sometimes you may need to interject politely. Wait for your customer to take a breath and use their name. Even in a noisy environment we all pay attention when we hear our name. It's known as the cocktail party theory.

OHT #7

Interject politely

Use the customer's name

Always remember your goal is to fulfil your customer's need. Therefore you should offer them choices, making the most of your comprehensive product knowledge. Nothing annoys a customer more than when you either don't have product knowledge at your fingertips or you don't immediately offer to find out what they need to know. You must try and think laterally about how to solve their problems.

Consider it a personal challenge to become an expert in your field and remain up to date with whatever product or service your organisation is providing.

OHT #8

Offer choices

Product knowledge is a basic requirement

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ACTIVITY 2**30 minutes**

- Divide participants into two groups and ask them to come up with 25 common and not so commonly asked questions from customers in their organisation.
- Bring the groups back together and get each group to ask the other group the questions.
- Discuss their answers

Facilitator's Suggestions:

Encourage participants to value the importance of knowing where to go to find out information even if they don't know the answer immediately.

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PART 5

OHT #9

Qualify customers for additional products with probing and clarifying questions
Give clear instructions on where to find information

Qualify customers for additional products or services whenever possible and overcome objections by asking probing and clarifying questions which elicit the customer's need.

Finally, you must give clear instructions about where to find information you require. This applies to serial numbers, model numbers, policy numbers, account numbers, invoice numbers and order numbers. The Customer Service Officer might deal with this sort of information every day but often customers become confused about where to find it. Seconds and sometimes minutes can be shaved off calls by giving callers clear instructions. However, be careful not to sound patronising or bossy.

ACTIVITY 3

15 minutes

THE VALUE OF CLEAR INSTRUCTIONS

- Divide participants into the same groups of six to eight and ask them to write brief, clear instructions for finding information commonly used in their organisation - account numbers, registration numbers, order numbers, model numbers, measurements, serial numbers etc.
- Go through the responses on the whiteboard and discuss. Brainstorm ways of explaining this information that will make it clear to the customer.

ACTIVITY 4

15 minutes

True or False?

- Ask participants to complete the True or False handout.

H/O # 1

- Go through the handout and discuss the answers.
- Address any queries the group may have.

Facilitator's copy: -

TRUE OR FALSE TEST?

Decide weather or not the following statements are true or false.

Statement	True/False
If your chair is uncomfortable, fix it - even if you're in the middle of a call.	False
Telephone customer service is so common these days; everyone knows how to use the service.	False
You should tell your associates that you would not answer office requests while you are taking a call.	True
The primary goal for every call is to help customers communicate their needs, guide them to make a decision and fulfill their request.	True

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When you want to redirect the conversation back towards your goal to fulfill the customer's needs, use back on track questions.	True
Back on track questions are usually open questions.	False
Always use the customer's name when you have to politely interject.	True
Make it a personal challenge to have comprehensive product knowledge.	True
Don't offer options to customers it will confuse them.	False
Objections are valuable opportunities to refine your knowledge about the customer's needs.	True

SUMMARY & DEBRIEF**40 minutes**

- Play the Video again.
- Go through some of the training points highlighted in the video using the OHT's.
- Ask for and answer any questions that participants may have.
- Let participants know if and when any follow up training is to be conducted.
- Give participants a copy of the Summary Sheet H/O #2.

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PARTICIPANT HANDOUT MASTERS

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TRUE OR FALSE TEST?

Decide whether or not the following statements are true or false.

Statement	True/False
If your chair is uncomfortable, fix it - even if you're in the middle of a call.	
Telephone customer service is so common these days; everyone knows how to use the service.	
You should tell your associates that you would not answer office requests while you are taking a call.	
The primary goal for every call is to help customers communicate their needs, guide them to make a decision and fulfill their request.	
When you want to redirect the conversation back towards your goal to fulfill the customer's needs, use back on track questions.	
Back on track questions are usually open questions.	
Always use the customer's name when you have to politely interject.	
Make it a personal challenge to have comprehensive product knowledge.	
Don't offer options to customers it will confuse them.	
Objections are valuable opportunities to refine your knowledge about the customer's needs.	

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Summary of Training

Firstly, give your full attention to the caller by making sure your workspace is functional before you accept a call.

Discourage interruptions from your associates by letting people know you will not speak to them while you're on the phone.

Avoid losing control of the call by helping your customer communicate their needs, guiding them to make a decision and fulfilling their requirements. The most effective technique to reclaim your call is 'Back on track' questions. These are formulated by listening carefully - and not just listening for interest sake, but listening for clues.

Back on track questions are usually closed questions. Closed questions encourage short answers. Open questions invite longer answers.

When necessary interject politely. Wait for your customer to take a breath and use their name. Even in a noisy environment we all pay attention when we hear our name.

Always remember your goal is to fulfill your customer's need. Therefore you should offer them choices making the most of your comprehensive product knowledge.

Be patient and respectful if they continue to go off on tangents or talk at a snail's pace, remembering to use back on track questions.

Qualify customers for additional products or services whenever possible and overcome objections by asking probing and clarifying questions which elicit the customer's need.

Give clear instructions about where to find information you require but be careful not to sound patronising or bossy.

Armed with a positive attitude and these practical skills you're guaranteed to have a healthy call rate without sacrificing your customer service standards.

OVERHEAD TRANSPARENCY MASTERS

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OBJECTIVES & AGENDA

After completing this training course you will understand: -

- What can be done to balance the quality verses quantity issues in the workplace
- How important focus and concentration are to customer care
- How to help the caller communicate their needs without sacrificing a friendly and interested attitude
- How to keep customers focused on their needs by listening for clues, using back on track questions and utilising options
- The importance of product knowledge

OHT #2

"You don't need to drive there,
just call them"

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- Give your full attention to the caller
- Ensure your work space is functional before you accept a call
- Discourage interruptions from your associates

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- Help your customer communicate their needs
- Guide them to make a decision
- Fulfill their needs
- "Back on track" questions

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Listen carefully

Listen for clues

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Open questions
invite a lengthy reply

Closed questions
encourage short answers

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Interject politely

Use the customer's name

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Offer choices

Product knowledge
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for additional products with
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Give clear instructions on
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