

DISCUSSION GUIDE

Call Center Success Case Studies

- I. **Listening Effectively**
- II. **Extending Common Courtesy**
- III. **Gathering Customer Information**
- IV. **Satisfying the Angry Customer**
- V. **Preparing a Mental Script**



This Case Studies Program is the “hands on” component of the *Call Center Success* multimedia learning program. It presents five situations to discuss and apply to your own call center environment. You may facilitate the five discussions in a single session, or use each case study as a tool for reinforcing learning in brief, individual sessions.

For each case, you will see a situation dramatized in the video. Once the situation is established, you will stop the tape to evaluate and discuss what you have seen. In some cases you will ask CSRs to choose among various scenarios, in others they will critique the performance and compare “before” and “after” versions.

Keep in mind that the purpose of these case studies is to stimulate learning. You may not agree entirely with the recommendations, but the purpose is to get your CSRs thinking and talking about their job, their challenges, and the needs of their customers.

Before the session, make copies of the Participant Notes pages and the Action Plan in this Discussion Guide. Also, make sure participants have *Call Center Success* workbooks so they can complete the recommended exercises.

I. LISTENING EFFECTIVELY

SET UP Case Study I by asking participants to take notes on how they would coach Don to improve his listening skills.

SHOW the introductory and first segment of the video, Listening Effectively.

STOP the tape when you see “Stop/Pause Your Tape.”

ASK: *“What’s wrong with Don’s listening?”*

Possible Answers:

- Not hearing the reason for the customer’s call
- Not focusing on what the customer had to say

ASK: *“How could Don improve?”*

Possible Answers:

- Don’t ask the customer to repeat what he has already said
- Take notes on what the customer says

ASK: *“Which option do you recommend? Should he stop and apologize or just go on?”*

SAY: *“Let’s see how the options play out for Don and his customer, Mr. Peters.”*

SHOW the rest of Case Study I. **STOP** the tape.

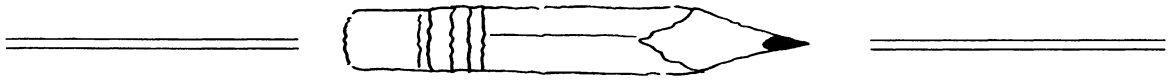
ASK: *“What made Option 2 work better than the other two?”*

Possible Answers:

- Don admitted he was wrong
- It gave Don a chance to diffuse the mounting frustration
- Don really didn’t “try harder” in Option 3.

ASK participant to complete the **EXERCISE** on page 46 of their participant books.

DISCUSS how they will apply effective listening skills in their call center.



I. LISTENING EFFECTIVELY

What is wrong with Don's listening?

How could Don improve?

Which option do you recommend?

- Option 1: Transfer to Sales
- Option 2: Apologize and start over
- Option 3: Keep going, try harder

How will you apply effective listening skills in your call center?

See pages 42–49 in your workbook for more tips on effective listening skills.

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II. EXTENDING COMMON COURTESY

SET UP Case Study II by asking participants to take notes on how they would coach Tina on using common courtesy.

SHOW the Case Study II video segment, Extending Common Courtesy.

STOP the video when you see “Stop/Pause Your Tape.”

ASK: *“Has Tina been rude?”*

Possible Answers:

- Some customers may interpret her behavior as rude
- Because she did not use common courtesy, she seems “cold”

ASK: *“How would you improve on Tina’s conversation?”*

Possible Answers:

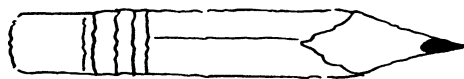
- Use more “courtesy” words
- Say “please” and “thank you”
- Anticipate possible confusion and make helpful suggestions (as in the case of the customer number)

SAY: *“Let’s see another version of the same conversation, this time using common courtesy.”*

SHOW the rest of Case Study II.

STOP the tape and ask participant to **READ** pages 58–60 in their participant books.

DISCUSS how they will apply common courtesy in their call center.



II. EXTENDING COMMON COURTESY

Has Tina been rude?

How could Tina improve?

How will you apply common courtesy in your call center?

See pages 50–60 in your workbook for more tips on extending common courtesy.

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III. GATHERING CUSTOMER INFORMATION

REVIEW “Open and Closed Questions” on page 66 and the definition of funneling in the box on page 70.

SET UP Case Study III by telling participants they will see two scenarios. They will be asked to discuss how Tom could improve his questioning techniques after the first scenario.

Answers: Questions 1–7 are closed; 8–10 are open.

SHOW the Case Study III video segment, Gathering Customer Information.

STOP the tape when you see “Stop/Pause Your Tape.”

ASK: *“What did you think about Tom’s tone?”*

Possible Answers:

- It wasn’t very friendly.
- He sounded like he was interrogating the customer.

ASK: *“Were the majority of his questions open or closed?”*

Answer: Closed

ASK: *“What might have happened had he asked more open questions in the beginning?”*

Possible Answers:

- He would have found out more about the situation
- The customer would have felt Tom wanted to understand his problem

ASK: *“How would you improve on Tom’s questioning?”*

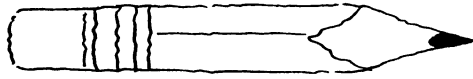
Possible Answers:

- Use common courtesy, like “please” and “thank you.”
- Don’t ask questions in rapid-fire succession.
- Soften the string of questions with phrases like, “if you don’t mind” and “will it be OK if ...”
- Ask open questions in the beginning to learn more about the situation, followed up with closed questions to focus the conversation.

SHOW the rest of the Case Study III video segment. **STOP** the tape.

ASK participants to complete the **EXERCISE** on page 70.

ASK them to share some of their open questions with the group.



III. GATHERING CUSTOMER INFORMATION

Put an “O” for “open” and a “C” for “closed” next to the questions below.

- _____ Would you be willing to consider a partial refund?
- _____ And what did you pay for the clock originally?
- _____ Have you checked to see if it was covered by your warranty?
- _____ And your date of the original purchase was?
- _____ Did you buy it here in the city?
- _____ What store was that?
- _____ Were you told about the winding mechanism at the time?
- _____ So when did you start noticing a problem?
- _____ And how did it break precisely?
- _____ And why is it that you feel this should be covered under the warranty?

How would you improve on Tom’s questioning?

See pages 66–70 in your workbook for more tips on gathering customer information.

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IV. SATISFYING THE ANGRY CUSTOMER

SET UP Case Study IV by asking participants to listen to what they think Ted is doing right and what he is doing wrong.

SHOW the Case Study IV video segment, Satisfying the Angry Customer.

STOP the tape when you see “Stop/Pause Your Tape.”

ASK: *“What should Ted have avoided in this conversation?”*

Possible Answers:

Taking the customer’s anger personally

Responding personally to the customer’s emotion

ASK: *“What would you do differently?”*

Possible answers:

- Act in a courteous manner
- Remain business like
- Avoid the customer’s emotion
- Apologize for the customer’s dissatisfaction

SHOW the rest of the Case Study IV video segment. **STOP** the tape.

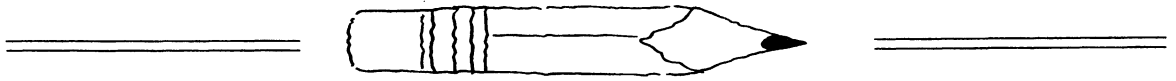
ASK: *“What did Ted do differently?”*

Possible Answers:

- Acted in a courteous manner
- Remained business like
- Avoided the customer’s emotion
- Apologized for the customer’s dissatisfaction
- Mentioned other benefits (good reliability)

Next have them complete the **EXERCISE** on page 77.

ASK them to share some of their responses with the group.



IV. SATISFYING THE ANGRY CUSTOMER

What should Ted have avoided in this conversation?

What would you do differently?

What did Ted do differently the second time around?

See pages 71–78 in your workbook for more tips on satisfying the angry customer.

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V. PREPARING A MENTAL SCRIPT

SET UP Case Study V by asking participants to listen to both versions of each scenario. Ask them to note why the second works better than the first.

SHOW Case Study V, the final video segment, Preparing a Mental Script.

STOP the video when you hear, “Thanks for participating.”

NOTE: The following exercise should prepare participants for developing their own mental scripts.

ASK: *“What might you say when asked the following questions?”*

1. The price of an item

Possible Answers:

- Explain the payment terms in addition to the price
- Explain how the price is a good value in relation to quality, competitors, etc.

2. Hours of business

Possible Answers:

- Explain alternative ways to do business with you outside of regular business hours
- Ask if you can help the customer over the phone

3. Send a catalog

Possible Answers:

- Ask if you can help the customer over the phone

4. Answer a question that is not in your scope of responsibility

Possible Answer:

- Get as much information as possible so you know where to transfer the customer

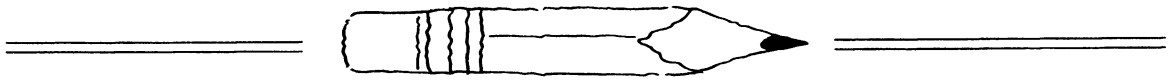
5. When a item will be delivered

Possible Answer:

- Explain the various options for delivery so customers may choose the best option for their situation

Next have them complete the **EXERCISE** on page 97.

ASK them to share their scripted responses with the group.



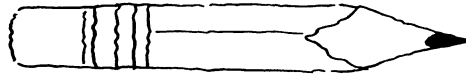
V. PREPARING A MENTAL SCRIPT

Why does the second, scripted response to the scenario work better than the first?

1. What's the price on that?
2. How late are you open today?
3. I've got your old catalog and I wonder if you could send me a new one.
4. I've got a question but I think it's probably for your technical people.
5. When can you deliver this to me?

See pages 95–97 for more tips on preparing mental scripts.

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ACTION PLAN

Identify the actions you will take to achieve greater success as a CSR in each of these key skill areas.

Listening Effectively

Extending Common Courtesy

Gathering Customer Information

Satisfying the Angry Customer

Preparing a Mental Script

Use your *Call Center Success* workbook as an ongoing resource for tips and techniques to succeed at your job.