

When You Can't Say Yes

Trainer's Manual

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Video written by Tracy Riddiford & Cathy Beitz

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FORE WARD

This program is designed as a half-day group training session on dealing with customers when you can't say "yes" to their request.

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 *When You Can't Say Yes*, as generic and flexible as possible.

This manual will provide you with some 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 dependent 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 trainers/facilitators 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
- Monitor and VCR player
- A whiteboard with markers and eraser
- Note paper and pens or pencils for participants

SYNOPSIS**WHEN YOU CAN'T SAY YES**

It's Emily's wedding day. She looks beautiful. Her father is extremely proud and her long-suffering bridesmaid, Elizabeth, has assured her that everything has been organised with military precision. The rest of the family and guests are already at the church and it's time for the bride to leave.

Everyone knows how stressful weddings can be. However, the stress levels at this wedding simply spiral out of control when our bridal party discover there is a water truck blocking the driveway, preventing their red convertible from getting them to the church on time.

The truck is locked. There's no driver in sight and the minutes are ticking away.

After a futile attempt to push the truck, Elizabeth decides to call the water department and get them to contact the driver to move the vehicle. It makes perfect sense really. From the customer's point of view, surely it's the responsibility of the company to move their truck? If only life was that simple.

Elizabeth finally gets on to Ethan who bluntly tells her that there's nothing he can do. Elizabeth gets more and more frustrated with his attitude, Ethan digs a bigger and bigger hole for himself with phrases like, "Sorry, nothing I can do" and "Madam, it's not my fault" and "I'm not allowed to do that".

After teaching Ethan a few simple tricks to saying no to a customer and maintaining customer service, the show eventually gets on the road and Emily and young Harry are united in matrimony.

As for the driver of the truck – well, he's never been seen since!

Featuring

Nuala Hafna as **Elizabeth**
Daniel Whyte as **Ethan**
Ellisa Elliot as the **Bride**
Edward McQueen-Mason as **Father of the Bride**
Ellen Freeman as **Mother of the Bride**
Huong Nguyen as **Limo Driver**
Jamie Rafenelli as **Truck Driver**
Andrew Martin as **Voice Over**

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 3 hours and 56 minutes.

COURSE WORK

RUNNING TIME

Welcome & Introduction	15 minutes
Objectives & Agenda	10 minutes
Introduction	10 minutes
Video & Discussion	26 minutes
Further Discussion	40 minutes
Activity 1 – The Hard No	15 minutes
Activity 2 – Complaints Are Costly	15 minutes
Activity 3 – Reasons For Saying No	15 minutes
Break	20 minutes
Activity 4 – The Service Response & Lateral Thinking	15 minutes
Activity 5 – True or False	15 minutes
Summary & Debrief	40 minutes

PART 1

WELCOME AND INTRODUCTION

15 minutes

- Welcome all participants to the *When You Can't Say Yes* 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 located.

OBJECTIVES AND AGENDA

10 minutes

Whether you're receiving calls "business to business", or business to consumer, this training course will provide you with some valuable tips to help build positive relationships with your customers.

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

OHT #1

After you've completed the training session on *You Can't Say Yes*, participants will understand the following: -

The difference between a HARD no and a SERVICE no
How to avoid giving a HARD no
The benefits of a SERVICE no
How to take personal responsibility for the customer's problem
Practical skills for giving a service no

How to show active listening
How to use lateral thinking
How to go beyond the customer's expectation

INTRODUCTION

10 minutes

- Using your own research and the notes provided below, give participants a brief overview of the importance of maintaining a positive relationship with their customers even when you cannot provide them with a direct solution to their request.
- Invite questions and discussion from the group as you go.

NOTE: This discussion will continue further after the video has been shown.

There is only one reason for the existence of every call centre or telephone operator in the world – to increase the quantity and quality of satisfied customers who use your organisation.

No one likes having to say no, or I can't, or we don't or it's just not possible, but often there is simply no choice. Most customer service representatives are faced with this situation every day in one form or another. Providing great service when you have to give a negative response is one of the toughest challenges we face in our working day.

However, firstly, we must realise that great customer service is much more than simply saying yes.

OHT # 2

Great Customer Service Is More Than Saying YES
When "Yes" Doesn't Cut It

I remember being in a situation where my partner and I wanted to have a quick meal in a New York restaurant. We could see from the front door that there were a dozen tables free. However, when we asked the Maitre D, he said that everything was booked for after theatre dinners. We knew that the theatre wasn't coming out for another forty minutes so we assured him we would be gone before his next patrons arrived. We only wanted a bowl of soup and we needed to be gone in 30 minutes to make an appointment. He didn't believe

us about the theatre, so we called them on my mobile and made the play's producer tell him when the final curtain call was scheduled. Eventually the Maitre D begrudgingly gave us a table. We grumbled through our soup and swore to never return. The Maitre D did eventually say "yes", but we were far from happy with the quality of the service. And what was the first topic of conversation at our next appointment – the stonewalling we got at the restaurant of course.

PART 2

THE VIDEO

Play the video When You Can't Say Yes	16 minutes
Lead a short discussion around the video	10 minutes

Facilitator's suggestions: -

- Have you ever been in a situation like that of Elizabeth?
- Have people said "no" to you when you think it was unjustified?
- What did you do?
- Who did you tell about your experience?
- What sort of person is Ethan?
- Initially, was Ethan trying to give bad customer service?
- Have you ever been in Ethan's position?
- How did you handle it?
- What sort of reaction did you get?

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PART 3**FURTHER DISCUSSION****40 minutes**

- Using the overhead transparencies and your own notes continue to lead the discussion encouraging participants to ask questions as you go. Use your own examples and personal experience to illustrate the points made below.

What are the phrases/responses that drive people crazy?

OHT # 3 Sorry, can't help you
 I have no idea
 It's not my fault
 It's not my job
 No, I'm not allowed to

It's more than just the words you say that drive people crazy. It's the intent not to help, which makes customers angry and upset.

OHT# 4 "Sorry, can't help you" etc indicates a HARD no
 There is a huge difference between a HARD no and a SERVICE no

Phrases like "sorry can't help you and I have no idea" are a surefire indication that you are giving the customer a HARD no. No matter how nicely you say it and no matter how sorry you are, a HARD no says to the customer, no ifs and no buts – they're not going to get any joy from your department.

Years of research have revealed that a HARD no has many serious repercussions for your organisation. It often takes more time and effort from you and almost always leaves your customer frustrated and unhappy. A frustrated and unhappy customer is six times more likely to tell people about a bad experience than a happy customer is about a positive experience.

When you can't say yes, there's a huge difference between a HARD no and a SERVICE no. A customer will always take away a perception of your organisation – if they receive a HARD no – it will be negative. On the other hand, even when

you can't say yes, if you deliver a SERVICE no, your customers will appreciate your willingness to help and it will guarantee a successful outcome to the call.

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OHT # 5

A SERVICE no

- demonstrates your willingness to help
- guarantees a successful outcome to the call

Show empathy

"I appreciate how upsetting that would be."

If it were happening to me, I'd be concerned too."

I understand why you need it urgently."

Let's work through some practical skills for delivering a SERVICE no.

For starters, it always helps to show some empathy for the customer's situation by letting them know that you care about their situation and their request. Always ask yourself, "How would you feel it was you?"

Use phrases like, "I appreciate how upsetting that would be." "If it were happening to me, I'd be upset too." "I understand why you need it urgently"

However, avoid saying to the customer, "I know how you feel." - because you don't. Only they know how they feel. It's one of those responses that even when delivered with the best of intentions, just winds people up.

OHT # 6

Begin with a positive attitude

The quality of our thoughts is reflected in what we say

"I'll do my best to help you find a solution."

Remember the old saying, I can read you like a book – well the same applies over the phone. The quality of our thoughts is reflected in what we say, so it is essential to begin with a positive attitude. Ask yourself, "How can I help this customer to the best of my ability?" Notice the use of the word "I". Using the word "I" tells the customer you are taking personal responsibility for their problem.

If we can't immediately say yes, we can always be of some assistance to the customer. Even in the worst case scenario we can still show empathy for their situation. But of course, that would be the worst case scenario. There are several other things to do before giving up on their request.

After you've shown empathy for their situation, it is a good idea to follow up that statement with something that tells the customer you're going to go out of your way to help them.

Customers sometimes miscommunicate their needs particularly in today's world of complicated terminology and industry jargon. Someone might come in asking for a Y28B spectrobolomanglemeter (no - I don't know what it is either) when really they need a Z43X. Therefore to avoid any miscommunication or confusion it's essential to get the facts quickly and efficiently. Ask pertinent questions without wasting the customer's time.

OHT # 6 Get the facts quickly and efficiently

Listening Skills

Verbal acknowledgements

Summarise what you're hearing

Keep customer informed

If you're talking to a customer face to face, you let them know you're listening by nodding, smiling and body language. Since you're on the phone, you need to demonstrate active listening by verbally acknowledging each response from the customer.

Summarise what the customer is telling you. It lets them know that you are listening and makes sure that you've understood them correctly.

It's also important to keep the customer informed as to what you're doing. We all hate dead air in a telephone conversation – especially if we're in a hurry.

OHT # 7 Understand the reasons why you can't say yes
Against the law
Against company policy
Out of stock
Just not possible

It is important to understand the reasons why you can't say yes. If it's against the law it's fairly simple. Most customers will understand if you're not prepared to break the law for them.

Against company policy is always a little trickier. It's not enough to know that it's against company policy. You should understand the reasons why it's against company policy. If you don't understand it yourself and can't explain it logically

to your customer then maybe you should be discussing the situation with your supervisor or manager. Either the policy needs revision or you need to research its logic.

If you completely understand the reasons for company policy you are often able to use discretion when applying certain rules. For example

Out of stock – it shouldn't happen but it does. There are several alternatives here-:

You can take a leaf out of an American retailer's book and ask the customer to either call back or wait on hold - while you organize with the competition to buy the product off their shelf in order to provide the customer with their request.

You can send them to the competition.

Or you can tell the customer when the item will be available. However, be sure you know what you're talking about. If you say it will be there on Monday - make sure it is.

Just not possible - Ok, you know your job, you're quite clear about the customers' needs and you know that you can't help them. It's now your job to educate the customer about why it's just not possible with a clear, honest, logical explanation.

OHT# 8 State the reason with an honest logical explanation

Avoid

- Unfortunately
- Sadly
- Regrettably

Consider the word "however"

Regardless of how tempting it is, avoid words like unfortunately, sadly or even regrettably. Those words immediately say to the customer that the news is going to be "all bad".

Instead, consider using the word, "however". "However" says to the customer that you are about to give them new information or a possible alternative. This is the secret ingredient of the SERVICE no. When you can't say yes to a customer, you must work out some other way that you can help them.

OHT # 9 SERVICE no
Work out some other way to help the customer

The Sandwich Technique
"What I will do is..."
"What you might do is..."

You also need to continue to keep the customer informed. Tell them what you are going to do to help solve their problem. Some of the textbooks will call this "The Sandwich Technique" – i.e. like a sandwich it has two parts with a filling in the middle. Part one is you tell the customer what you will do to solve the problem – "What I will do is." Part two is to tell the customer what they might do to find a solution – "What you might do is....." This is usually a suggestion or alternative course of action.

You have to understand that great service is much more than simply saying yes. People contact you because they think you can provide them with a product or solve their service dilemma. Even when you can't do this, their request is often somehow related to your industry or line of business.

OHT # 10 Don't give up easily
Use your smarts
Turn on your lateral thinking
Rack your brain for alternatives

So don't give up easily, use your smarts, turn on your lateral thinking and rack your brain for alternatives and information that might help them. They will appreciate it.

In effect, saying no doesn't have to be "all bad". Consider it as an opportunity to show how clever you are. It offers you the chance to use your common sense and get your creative juices flowing. Maybe your suggestion for the customer will be better than what he or she originally requested. Then they will be yours forever.

OHT # 11 Go beyond the customer's expectation
Check the customer's satisfaction

Always go beyond the customer's expectation whenever possible. Give them the phone number of the organisation who might be able to help them. Make

the call to your competition yourself if you can. Give them a contact to speak to. Give them any background information about the alternative service.

Whenever you can, check back with the customer to see if they've solved their problem.

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PART 4

ACTIVITY 1

15 minutes

The HARD No

- Play the first scene of the video again.
- Divide participants into groups of six to eight and ask them to list the responses that constitute a HARD no. (e.g. What did Ethan say wrong in the first scene and what other phrases come in the HARD no category?)
- Go through the responses on the whiteboard and discuss why they make customers frustrated and unhappy.

Facilitator's Suggestions:-

- Sorry, can't help you.
- I have no idea.
- It's against the rules.
- No. I can't.
- No. I'm not allowed to.
- It's not my job.
- It's not my fault.
- There's nothing I can do.
- What do you want me to do?
- I don't know.

ACTIVITY 2

15 minutes

Complaints Are Costly

- Divide participants into the same groups of six to eight and ask them to list why Ethan's HARD no would have taken more time and effort.
- Go through the responses on the whiteboard and discuss why they are important.

Facilitator's Suggestions:-

- Elizabeth may have reported him, taking up her time, Ethan's time and the supervisor's time in a process that easily could have been avoided.
- The effect of negative public relations will take a long time to recover from and will take much more effort and financial cost to repair.
- A typical dissatisfied customer will tell 8 to 10 people. However, 1 in 5 of them will tell 20 people.
- It takes 12 positive service incidents to make up for one negative.
- A typical business hears from only 4% of its dissatisfied customers. The other 96% just go away. Of the 96%, 91% will never come back.
- You miss an opportunity to learn and improve
- Puts reputation and credibility at risk

ACTIVITY 3

15 minutes

Reasons for Saying No

- Divide participants into same groups of six to eight and ask them to list the reasons for saying no. Ask for examples of those reasons that are applicable in their organisation.
- Go through the responses on the whiteboard and discuss why they are important and what their relevance is.

Facilitator's suggestions:-

- Against the law
- Against company policy
- Out of stock
- Service unavailable
- Just not possible

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ACTIVITY 4

15 minutes

The Service Response & Lateral Thinking

- Ask participants to complete H/O # 1

H/O # 1 Facilitator's copy: -

List the three most common experiences you encounter when you have to say no to your customers. Devise a SERVICE no response. Please note that these examples will not be relevant to your organisation and may need to be revised.

Customer's request which cannot be granted	SERVICE no response
1. Mr Flanagan cannot pay his electricity account and does not want his service disconnected.	<p>Explain to the customer your organisation's policy on credit and payment plans. See if there's any way it can be negotiated.</p> <p>If that doesn't work, offer them the numbers for charities or other government departments that may help them.</p>
2. Ms Smith wants to order a replacement part for her car. The company is out of stock.	<p>Find out how urgent the request is.</p> <p>If it is urgent, work out if a different brand or type will work.</p> <p>If that doesn't satisfy the customer, either buy the part from your competition and have it delivered at cost, or refer them to the company that can supply the part.</p>
3. Mr Jones wants to send a parcel to an area that your organization doesn't service.	<p>Suggest an alternative company who can help your customer.</p> <p>Provide them with the name, phone number and a contact person to help them.</p> <p>Call them yourself if possible.</p>

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ACTIVITY 5

15 minutes

True or False

- Ask participants to complete the "True or False" handout.
- Go through the handout and discuss the answers. Address any queries the group may have.

Facilitator's copy: -

H/O # 2

TRUE OR FALSE TEST

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

Statement	True/False
If I speak calmly and politely the customer will understand that I can't help them.	False
Sometimes there's nothing I can do.	False
Customers often mis-communicate their needs.	True
Probing and clarifying questions will often reveal the nut of the customer's need.	True
Customers who are ignorant of your company's policy shouldn't bother you.	False
You should always take company policy at face value. The	False

powers that be obviously know better than you.	
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When you discover a way to improve your organisation's policies, write a memo or make suggestions for improvement.	True
You should do your best to understand the logic behind company policy.	True
You should make it your business to know your industry and be aware of the service provided by your competition.	True
It's always best to begin your explanation of why the goods or service are unavailable with unfortunately, sadly or regrettably.	False
Use the word "however" before telling the customer what you can do.	True

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PART 5

SUMMARY & DEBRIEF

40 minutes

- Play the Video again.
- Go through some of the training points highlighted in the video and this training session using the OHT's.
- Ask for and answer any questions that participants may have.
- Let participants know if and when any follow up training will be conducted.
- Give participants a copy of Hand Out # 3 Summary Sheet.

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PARTICIPANT HANDOUT MASTERS

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The SERVICE RESPONSE – Lateral Thinking

List the three most common experiences you encounter when you have to say no to your customers. Devise a SERVICE no response.

Customer's request which cannot be granted	SERVICE no response
1. Mr Flanagan cannot pay his electricity account and does not want his service disconnected.	
2. Ms Smith wants to order a replacement part for her car. The company she has called is out of stock.	
3. Mr Jones wants to send a parcel to a country that your organisation doesn't service.	

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H/O # 2

TRUE OR FALSE TEST

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

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Customers often miscommunicate their needs.	
Probing and clarifying questions will often reveal the nut of the customer's needs.	
Customers who are ignorant of your company's policy shouldn't bother you.	
You should always take company policy at face value. The powers that be obviously know better than you.	
When you discover a way to improve your organisation's policies, write a memo or make suggestions for improvement.	
You should do your best to understand the logic behind company policy.	
You should make it your business to know your industry and be aware of the service provided by your competition.	
It's always best to begin your explanation of why the goods or service are unavailable with unfortunately, sadly or regrettably.	

Use the word "however" before telling the customer what you can do.	

HO # 3

SUMMARY OF TRAINING

We all hate phrases like, "Sorry, can't help you." "It's not my fault" and "It's not my job". Phrases like that are a sure sign you're listening to a HARD no.

We need to recognise the difference between a HARD no and a SERVICE no.

A HARD no takes more time and effort and leaves the customer unsatisfied.

A SERVICE no demonstrates that you care about the customer's request and guarantees a successful outcome.

For a SERVICE no you need to approach every call with a positive mental attitude.

Remember there's always something you can do for the customer so ask yourself, "How can I help this person to the best of my ability?"

Begin your response by showing empathy.

You'll also find callers often mis-communicate their needs, so turn on your detective skills - get the facts quickly and efficiently. Since you're on the phone, show the customer you're listening with verbal responses and don't forget to summarise what they've told you.

You do need to give your caller an honest logical explanation for why the product or service is unavailable.

Avoid words like, "unfortunately", "regrettably" or "sadly". Instead use the word, "however". "However" indicates new information and keeps the interaction positive.

The most important element of the "the service no" is to do your very best to work out some other way that you can help the customer reach their goal.

Don't give up easily, use your smarts, turn on your lateral thinking and rack your brain for alternatives.

Great service means you have to try that little bit harder. Go beyond the customer's expectation.

A "Service No" makes everyone a winner. You feel good knowing you've helped your caller and they feel good knowing you tried your best to solve their problem.

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OVERHEAD TRANSPARENCY MASTERS

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OBJECTIVES & AGENDA

After completing this training course you will understand: -

- The difference between a HARD no and a SERVICE no
- How to avoid a HARD no
- The benefits of a SERVICE no
- How to take personal responsibility for the customer's problem
- The practical skills for giving a service no
- How to show active listening
- How to use lateral thinking
- How to go beyond the customer's expectation

OHT#2

Great customer service is
more than saying YES

When "YES" doesn't cut it

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"Sorry, can't help you."

"I have no idea."

"It's not my fault."

"It's not my job."

"No, I'm not allowed to."

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OHT#4

**“Sorry, can't help you”
indicates a HARD no**

**There is a huge difference between
a HARD no and a SERVICE no**

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A SERVICE no

- Demonstrates your willingness to help
- Guarantees a successful outcome to the call

Show Empathy

- "I appreciate how upsetting that would be."
- "If it were happening to me, I'd be concerned too."
- "I understand why you need it urgently."

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Begin with a positive attitude

The quality of our thoughts is reflected in what we say

"I'll do my best to help you find a solution."

Get the facts quickly

Listening Skills

- Verbal acknowledgements
- Summarise what you're hearing
- Keep customer informed

Understand the reasons why you can't say "yes"

- Against the law
- Against company policy
- Out of stock
- Just not possible

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State the reason you can't say
"yes", with an honest logical
explanation

Avoid

- Unfortunately
- Sadly
- Regrettably

Consider the word "however"

SERVICE no

**Work out some other way
to help the customer**

**The Sandwich
Technique**

"What I will do is..."

"What you might do is..."

Don't give up easily

Use your smarts

Turn on your lateral thinking

Rack your brain for alternatives

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Go beyond the customer's
expectation

Check the customer's satisfaction

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