

Telephone Etiquette

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Etiquette – Definition

- The forms required by good breeding, or prescribed by authority, to be observed in social or official life; observance of the proprieties of rank and occasion; conventional decorum; ceremonial code of polite society. The practices and forms prescribed by social convention or by authority.

Etiquette – QUESTION #1

- Your boss, Ms. Alpha, enters the room when you're meeting with an important client, Mr. Beta. You rise and say "Ms. Alpha, I'd like you to meet Mr. Beta, our client from San Diego." Is this introduction correct?

Etiquette

- There are many written and unwritten rules and guidelines for etiquette
- Possibilities to commit a faux pas are limitless
- But you can minimize them
- Avoid causing a bad impression by being generally considerate and attentive to the concerns of others
- When in doubt, stick to the basics

The Basics

- Be courteous and thoughtful to the people around you, regardless of the situation
- Consider other people's feelings, stick to your convictions as diplomatically as possible
- Address conflict as situation-related, rather than person-related
- Apologize when you step on toes

Developing Etiquette

- Parenting
- Observing
- Listening
- Experiencing
- Cultural
- Watching
- Training

Types Of Etiquette

- Dining
- Business
- General, Everyday
- Introductions
- Telephone
- E-mail
- Golf, Wedding

Etiquette – QUESTION #2

- At a social function, you meet the CEO of an important corporation. After a brief chat, you give him your business card. Is this correct?

Etiquette

- Etiquette applies to every social situation you may find yourself in
- Displaying proper etiquette will ensure that you feel comfortable and accepted
- Typical behavior is to glance around and observe what other people are doing and follow suit

Business Etiquette

- Businesses each have a unique culture
- In hiring new staff
- Experience from past employment
- Life experiences
- Diversity
- They watch, listen and gain experience on what is acceptable to succeed within their position

Telephone Etiquette

- Each of our businesses needs to examine what we are looking to portray to our customers
- A solid documented standard of operating procedures
- A positive way to monitor our frontline staff
- A positive tool to COACH and train staff
- A measurement tool to track our success
- Customer and staff feedback to ensure it is working

Etiquette – QUESTION #3

- A toast has been proposed in your honor. You say "thank you" and take a sip of your drink. Are you correct?

GETTING STARTED - Overview

- The first goal is to develop a clear guideline – A set of Standard Operating Procedures
- What are you trying to portray
- What do you want your customers to feel when they call your company
- Make a list of what is important

Standards

- Produce your Standards – a standard is an objective measure that applies to everyone.
- EXAMPLE
- Salutation
- Identify department or area
- Identify yourself using your name

Tips For Developing Standards

- Answering the phone in a memorable way
- Slurring the Organizations Name
- Why do we need telephone training
- Putting People on hold
- Maximize Positive Influence
- Mind your manners

Answering The Phone In A Memorable Way

- Golden opportunity to create a WOW
- Enhanced differentiation of who your organization is and what you deliver – security, peace of mind
- Your customer will think of you next time they need your product or service
- Passion and enthusiasm are infectious!

Etiquette – QUESTION #4

- You're at a dinner and champagne is served with the dessert. You simply can't drink champagne yet know the host will be offering a toast. Do you:
 - a) tell the waiter "no champagne."
 - b) turn over your glass
 - c) ask the waiter to pour water into your champagne glass instead
 - d) say nothing and allow the champagne to be poured?

Slurring The Organizations Name

- Why does the greeting get slurred?
- The telephone is as important as ever
- Slow down your greeting; take the time to say it right!
- Don't slur the greeting. Enunciate it!
- Vary your greeting. Keep it fresh for you and for them!
- Smile!!

Why Do We Need Telephone Training?

- The first 15 seconds of any telephone call are crucial
- Use your natural voice pitch
- Sit up straight
- Notice the responses of your callers
- Listen actively

Putting People On Hold

- Callers are abruptly put on hold without comment or warning
- ASK "Can you hold, please?"
- WAIT for the caller's response!
- When you return on the line with a holding caller
- Your first words should be, "Thank you for holding!"

Etiquette – QUESTION #5

- You're at a table in a restaurant for a business dinner. Midway through the meal, you're called to the telephone. What do you do with your napkin?
 - a) Take it with you.
 - b) Fold and place it to the left of your plate.
 - c) Loosely fold it and place it on the right side.
 - d) Leave it on your chair.

Maximize Positive Influence

- **Consider . . .**
Does your phone staff realize the positive influence and benefit behind kindness, courtesy and customer relationship building?
- **Then ask yourself . . .**
Does your phone staff know how to use and maximize positive influence through proven customer service techniques such as word choice, conversation control and voice tone?
- **Now the big picture . . .**
How important is kindness, courtesy and relationship building to your business?

Mind Your Manners

- Promptness counts
- Don't jump to conclusions
- Listen "between the lines."
- Ask questions
- confirm that you have understood him correctly

Calibration Session

- Produce a call evaluation (coaching) form that is based on your standards
- Test your standards
- Meet with a group of people and listen to calls – have an open discussion
- Are the Standards confusing
- Do they allow the staff to recognize the customers communication style
- Do the standards allow the staff to adapt to the customers style – so that the customer will hear, understand and believe

Etiquette – QUESTION #6

- You've forgotten a lunch with a business associate. You feel terrible and know he's furious. Do you:
 - a) write a letter of apology?
 - b) send flowers?
 - c) keep quiet and hope he forgets about it?
 - d) call and set up another appointment?

Calibration Session - continued

- “Tweak” the standards until the calibration group is in agreement
- Create a nuance list which is a “cheat sheet” that agents use as a bible for what constitutes working within the standard or falls outside the standard

Nuance List

- For example: Standard is – all call openings should be:
- Good morning/afternoon/evening, Customer Service, this is Marcie
- Agent says “Good morning and welcome to VOXCOM Customer Service, my name is Marcie and how may I help you today?”

Nuance List

- Clearly – this is not what the standard states – It is not that they left anything out but the agent has added to your standard – is this within or outside the standard?
- You can tighten or loosen a standard – based on your nuance list
- It is imperative to communicate your standard clearly so it can be followed
- If staff do not know what the standard is they will do what they think is right

Standards

- Produce your revised Standards
- Communicate the process
- Share the evaluation (coaching) form
- Communicate your expectations
- Assign individual coaches
- Communicate your goals
- Provide a list of – Standards, Nuances, specific scripting if it applies

Coaching - Evaluating

- Sit in and listen on actual calls – or listen to taped calls with staff
- After the call, the coach will discuss the call with the agent
 - Ask a question
 - Listen to the answer
 - Repeat steps One and Two
 - Offer “ideas” as needed

Coaching - Evaluating

COACH - "How did that call go for you?" or

- "What seemed to work really well for you in that call?" or
- "If you could do that call over again, what would you change?"

AGENT - "It was "ok", "terrible" or "terrific"

Coaching - Evaluating

COACH - "Why was it "ok", "terrible" or "terrific"

- Listen for the answer

COACH - "Was there a chance to add anything that would have achieved a "thrilled I called" response from them?"

- Listen for the answer

COACH - Offer "ideas" for ways to WOW the customer

Coaching - Evaluating

- Develop opportunities for improvement
- Takes away the confrontational elements
- The agent is learning, for herself
- Where she is in her skills and where she can go
- What an improvement from "telling" feedback that informs the agent what she needs to do "better"

Answer - Question #1

- No. Introduce the more important person first. You should address your client and say "Mr. Beta, I'd like you to meet our Vice President of Development, Ms. Alpha." (Alternative answer - introduce the client as the more important person!)

Answer - Question #2, 3, 4, 5 & 6

- 2) No.
- 3) No. If you do, then you're toasting yourself.
- 4) D. It's more polite not to call attention to the fact that you can't drink champagne.
- 5) D. Leave it on your chair. Definitely don't put it on the table--what if you have crumbs on it?
- 6) D. Call and set up another appointment. And don't forget to apologize for your error. Imagine how you'd feel if it was you!