



Customer Service Training

Importance of Phone Etiquette

July 2013 Quality Topic

Why is Customer Service So Important?

- A company's most vital asset is their customers. Without them, we would not and could not exist in business.
- When you satisfy customers, they not only help us grow by continuing to do business with you, but recommend you to new potential clients.



Know Who is Boss

- You are in the business to service customer needs, and you can only do that if you know what it is your customers want.
- Never forget that the customer makes your job possible and is an important asset to the entire company.
- Your goal with each call should be to have it end in a positive way and be a pleasant experience.



Ring...Ring...Ring...Time to Answer!

- Basic phone etiquette rule; answer the phone within **3 rings**.
- **SMILE** before you pick up the phone! Even though the caller can not see you, your expressions transcends through the phone.

Helpful Tip: Keep a mirror at your desk and make sure YOU would want to have a conversation with the person in the mirror.

- Stop what you are doing and focus your undivided attention on the call so that you clearly understand what is being requested.
- Co-workers can be very distracting, especially in a cube environment. Keep your co-workers at bay until you are off the phone.



Make a Good First Impression

Incoming Calls

- Answer the phone promptly and be pleasant. It is important to make a good first impression.
- Project a tone that is enthusiastic, natural, confident, attentive and respectful.
- Even on days when you are tired, you need to sound as if you are awake and ready to help.
- Offer a friendly greeting that includes your Name, Department and HealthSmart as your employer.



Make a Good First Impression

Outbound Calls

- Express yourself clearly and concisely.
- Project a tone that is enthusiastic, natural, confident, attentive and respectful.
- Be certain of the number you're dialing, to avoid disturbing someone unnecessarily. If you do reach a wrong number, it is important to say, "I'm sorry, I dialed the wrong number." before hanging up.
- After someone answers the phone, give your name and HealthSmart as your employer before asking for the person desired.



Be A Good Listener

- Take the time to identify customer needs by asking questions and concentration on what the customer is really saying.
- Listen to their words, tone of voice, body language, and most importantly, *how they feel*.
- When listening to the customer, make sure you take good notes on their issues and repeat them back. This will help the customer know you were listening, and will help you to better resolve their issues quickly.
- Document the correct name and number, and record the date and time of the call.



Putting a Caller on Hold

- Explain why you need to put the caller on hold and ask permission first.
- If you keep the caller holding longer than **30 seconds**, return with an update and ask if he or she wants to continue holding.
- Use the hold button rather than covering the phone with your hand or setting it on the desk.
- If they are holding for a coworker, ask the caller if she/he would prefer to hold or leave a message on their voicemail.



Transferring a Call

- Never transfer a caller unless you know where to transfer the call and you're sure someone is available to take the call.
- Explain why and to whom you are transferring the call.
- Provide the caller with the department, name, title and number you are transferring them to.
- Be sure the caller wants to be transferred.
- Don't cut the caller off!
- If you were not the right person to receive the call, ask the caller who transferred them to you. Contact that person and tell them who the appropriate contact is for future reference.



Identify and Anticipate Needs

- Most customer needs are emotional rather than logical. They buy good feelings and solutions to problems.
- The more you know your customers, the better you become at anticipating their needs.
- Communicate regularly so that you are aware of problems or upcoming needs.



Make Customers Feel Important & Appreciated

- Personalize the call by using their name throughout the conversation.
- Find ways to compliment them, but be sincere. People value sincerity.
- Thank them every time you get a chance.
- Make sure that your body language and/or tone conveys sincerity. Your words and actions should be congruent.
- The extra effort will reassure the customer you really care.



Be Considerate & Professional

- Along with using common courtesy (i.e., *Please, Thank you, You're welcome*), let the caller know that you want to help solve their problem.
- Always speak calmly and choose your words naturally.
- Use professional and appropriate language. Avoid using slang or sloppy grammar. It is best to use simple and straightforward language that is easily understood and can't be misinterpreted.
- Speak directly into the phone and pronounce words clearly and carefully. It is difficult to understand if you are mumbling on the phone call.
- Don't eat or drink while you're on the phone.
- Put all cell phones away or keep them on silent. The ringer or vibration sound can be very distracting during a phone call.



Appreciate the Power of “Yes”

- Always look for ways to help your customers and ensure an easy process for them.
- When they have a reasonable request, tell them that you can do it.
- Always do what you say you are going to do.
- Follow through on promises in a timely manner.
- Thank customers for bringing their concerns to your attention.



Know How to Apologize

- When something goes wrong, always apologize. It's easy and the customers appreciate it.
- The customer may not always be right, but the customer must always win.
- Deal with problems immediately and let customers know what you have done to resolve issues.
- Be honest. Don't make excuses and don't be defensive.
- Value customer complaints. As much as we dislike it, it gives us an opportunity to improve.



Give More Than Expected

- Think of ways to elevate yourself above the competition.

Consider the following:

- ▶ What can you give customers that they cannot get anywhere else?
- ▶ What can you do to follow-up and thank people even when they don't buy?
- ▶ What can you give a customer that is totally unexpected?



Get Regular Feedback

- Encourage and welcome suggestions about how you could improve.
- There are several ways in which you can find out what customers think and feel about your services, such as:
 - ▶ Listen carefully to what they say.
 - ▶ Follow-up to see how things are going.
 - ▶ Provide a method that invites all comments and suggestions.



Treat Fellow Employees Well

- Employees are your internal customers and need regular doses of appreciation.
- Thank your co-workers and find ways to let them know how important they are.
- Treat your coworkers with respect and chances are they will have a higher regard for customers!



Remember:

- Great customer service is the lifeblood of our business.
- Good customer service is all about bringing customers back by keeping them happy.
- Satisfied customers will pass positive feedback about you and HealthSmart to future customers.





Take Your Completion Survey!

Please click on the link below to complete the July Quality Topic completion survey. The answers to the quiz questions can be found in this presentation.

ALL Care Management staff is responsible for submitting their online completion survey by **July 31st**.

Completion Survey Link:

<https://www.surveymonkey.com/s/July2013QualityTopicSurvey>

Please contact Joslyn Crain if you have any questions.

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