

HOW TO MAKE EVERY PHONE CALL GREAT

LIVING SMALLER
SMARTER

HERE ARE 6 TIPS YOU AND YOUR TEAM MEMBERS CAN USE TODAY TO START DELIVERING AMAZING CUSTOMER SERVICE.

1 SET THE TONE WITH YOUR INTRODUCTION

Introduce yourself and your role to the caller. Use upbeat, positive language and write down their contact information, including their name, email address and phone number, as well as what they're calling about. Setting the tone early is important to a successful interaction.

2 TRANSITION INTO THE CONVERSATION

Lead with an open-ended question that allows the caller to tell you about the reason for the call. This will help you to determine how to best help. "Monogram" the call by using the caller's name. Ask clarifying questions to ensure you are helping to solve the right issue.

3 ENGAGE, EMPATHIZE, INFORM (REPEAT)

Ask questions that allow your caller to open up. Repeat information back to ensure that you are discussing the same issue. Make the caller feel valued and important to you. Share knowledge when it is appropriate to do so.

4 BUILD A CUSTOMIZED PLAN

Now that you fully understand the issue, it's time to help the caller solve it. Explain the next steps and who will be responsible for them. Be sure to set clear timeframes, explain all steps and be as complete as possible.

5 SUMMARIZE THE CALL

Review what you've covered in the call and discuss both your next steps and the caller's. If you are transferring the call, use a "warm" transfer – ensuring that the next person to receive the call understands the issue and is the right person to deal with it.

6 FOLLOW UP

Follow up on any next steps you've written down for yourself and reach back out to the caller after an appropriate amount of time to make sure that the issue has been resolved. If it has not, repeat the steps until it is.

