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Telephone Techniques

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One of the most important aspects of success in business is the ability to communicate by telephone. Answering the telephone is not a difficult physical task, but using it in a business-like and professional manner is not so straightforward. Millions of pounds are lost every year by poor handling of telephone enquiries. However, customers who are well handled will call again and bring more business.

The telephone is one of the most used but least understood of business tools. It enables you to communicate with people over large distances, saving you time and money – at least it should! Consider how much of your working day is spent on the telephone and how much your organisation relies on the telephone. For some businesses such as mail order companies or help desks, the telephone is almost their entire source of revenue.

How much do you personally rely on the telephone to enable you to do your job? Imagine being without a telephone. How would it affect your working day?

The Negative Side

The problem with the telephone, however, is that it often rings when you are busy and don't really want to be disturbed. Except for telephones with a caller display panel, the telephone does not allow you to see who is calling, so you may end up talking to someone who you would not choose to talk to at that precise moment. Telephone calls can be a time-consuming, troublesome intrusion into your busy life, yet try being in business without a telephone!

Be aware of the power of the telephone – it creates opportunities and conveys information in a fast and effective way, but unless it is managed properly it makes you instantly available to other people at any time of the day. Like many other people in the modern business world, you are expected to use the telephone on a daily basis, but no real training has been given in its effective use. Your initial thoughts may be: 'But what is there to know about using the telephone? It rings; you pick up the receiver and speak. When the conversation is over you replace the receiver and that's all there is to it.' If only it were that easy! Telephones are such a regular feature of our everyday lives, it is easy to take them for granted and assume we know how to use them to good effect. Yet there are numerous pitfalls of telephone communication.

First Impressions Last

The caller receives an impression within the first few seconds of the telephone being answered and that impression is essential to the future relationship that you have with either the individual or their organisation. So it is crucial to get it right and make sure that the first impression is a positive one. As Dale Carnegie says: 'You never get a second chance to make a first impression'.

Whenever we speak to a stranger on the telephone, we build a mental picture of that person determined solely by what we hear through the earpiece. Therefore, someone is doing the same with us. The telephone can be the first or only contact we may have with a customer or business contact and it is essential for you and your business that it is used effectively. The telephone provides you with the means to communicate what your service is really about, how competent you are as an individual, and how effective and efficient your organisation is.

The image you create on the telephone, and the initial rapport you create with the caller is extremely important. We tend to base our initial assumptions on how a caller sounds. If someone answers the telephone using an inappropriate tone – perhaps they were a little abrupt or annoyed, or laughing and joking – it could easily create the wrong first impression. When someone calls us, the questions we ask and the way we respond will show what sort of person we are and what kind of organisation we represent.

Barriers & Benefits

There are a few barriers to the effective use of the telephone. With a face-to-face meeting, extra information can be picked up from a person's body language or facial expression, we know roughly what age they are and what they look like. While we are forming an impression about them, they are doing the same with us. When holding a telephone conversation with someone, we are denied this 'extra' information and it is easier to jump to the wrong conclusions.

However, think what benefits they bring! Long distance telephone calls saves expense in travelling, both in time and in the monetary sense. It may be easier to contact someone by telephone than to set up a meeting, it is quick and relatively inexpensive and it is also a great equaliser. By that I mean that a young office junior can gain experience in sounding authoritative, while at the same time looking like a frightened rabbit.

How Well Do You Perform?

Because telephones are an everyday part of life, you probably never consider whether your telephone 'performance' is good or bad. Most people believe that their telephone skills are fairly good, purely because they know how to operate the machine. But does practice really make perfect? Just because you have had years of experience using the telephone does not mean that you know how to use it effectively. And when problems arise most people tend to blame the person on the other end of the telephone.

Be brutally honest with yourself – have you ever done any of the following?

- ☎ misunderstood someone over the telephone
- ☎ wished you were talking to the other person face-to-face
- ☎ felt frustrated with the person at the other end of the telephone
- ☎ wanted to 'strangle' the other person
- ☎ felt that the person at the other end of the line was uncooperative
- ☎ blamed the person on the other end of the line when they did not understand you
- ☎ decided that you don't like someone because of their voice
- ☎ lost the thread of a conversation
- ☎ been unhelpful because you were busy

If you have said yes to any of the above, then your performance over the telephone may not be as good as you would like to believe.

Even though you may already be a good communicator on the telephone, you can always be better.

Talking On The Telephone

You need to create a professional image, but also allow your personality to show. This can be hampered by the lack of visual feedback. Most people are unaware of the importance of body language in their day-to-day communication and social interaction. In fact, verbal communication usually accounts for only 7% of the total communication process. A large proportion of communication is done via body language.

However, most of your body language is lost on the telephone so you need to make sure that the message that you are giving verbally is positive. The tone of your voice reveals feelings and emotions. It can reveal your attitude towards the caller. Remember, 'it's not what you say, but the way that you say it'. Also bear in mind that not all of your body language is lost over the telephone. Although you can't be seen, the person who you are talking to has a mental picture of you.

Your physical appearance – your facial expression and your body posture, will alter the way you sound in subtle ways, such as the tone and pitch of your voice, and this information will be picked up by the person on the other end of the line. You need to convey: a positive approach; enthusiasm; a genuine desire to help and a warm and cheerful manner. This can sometimes be difficult as we all have our 'off' days, we may be feeling ill or we may have had an argument with someone. This 'mood' will be conveyed in the tone of our voice so we must make a conscious effort to replace these negative traits with positive ones. You have to think about how you want your business contacts to feel after talking to you on the telephone.

You may find it useful to follow these six steps to ensure you adopt a professional telephone manner:

- ☎ prepare carefully what you are going to say and note down your objectives
- ☎ sit upright to avoid constricting your voice
- ☎ speak clearly, pace yourself, keep the tone neutral
- ☎ remember to be polite, and make sure you always leave your contact with a good impression
- ☎ be warm, friendly and consistent
- ☎ choose your words carefully, avoiding any form of ambiguity, jargon or slang expressions.

Listening On The Telephone

Listening is a skill and can therefore be developed and improved with self-awareness, discipline and practice. Maintaining concentration is one of the main barriers to effective listening and this is particularly acute when listening to someone on the telephone. Because your sense of sight is not being fully utilised it can stray and bombard you with distracting information. How often have you been distracted from a telephone call by something more interesting happening in the office or out the window?

Stop Fidgeting

How can you listen to someone effectively when you are fiddling, fidgeting and constantly changing your seating position? The caller will know that you are not giving them your undivided attention. Likewise, tidying papers and rearranging notes are jobs that can wait until after the call.

Assess The Meaning Behind The Words

You have plenty of time to assess the message that the speaker is trying to get across – the average rate of speaking is around 125/150 words per minute, but the rate for listening is 400/500 words per minute, so time is on your side. If the subject is complex, try not to switch off due to your own lack of understanding. Ask questions, where appropriate, trying not to interrupt the speaker too many times as this will spoil the flow. Make a note of any questions that do not need immediate answers and clear them up at a convenient break in conversation. Making notes will also help you to remember what was said after the call.

If you know that you are going to have difficulty in concentrating on what the caller is saying for some reason, assess whether you could reschedule the call for when you are properly prepared or the office has quietened down. If the information is complex, would fax, letter or Email be a better way of communicating?

Remain Focused

Nit-picking and getting bogged down in details or trivial points will only irritate the caller, as will asking questions about another subject. Tune in to what the caller is trying to put across. Effective listeners hear everything that is said, not just the parts that they agree with. In doing this they gain valuable insights as well as the co-operation and respect of the person they are talking to.

Barriers To Listening

Barriers to listening happen in many ways, here are just a few:

| <u>Physical Barriers</u> | <u>Other Barriers</u> |
|--|--|
| Room temperature Too hot/cold | Jargon/technical terms |
| Air conditions Room too stuffy/unventilated | Accents/unusual verbal habits |
| Lighting Too bright/dim | Complexity of information |
| View From window/round the room | Speed/volume of delivery |
| Furniture Uncomfortable/badly positioned | Monotone (boring delivery) |
| Noise Internal/external | Psychological barriers Anxiety, frustration Fear, status Prejudice, background difference Expectations |

In an instance where a speaker may have an accent or strange verbal habit, it is important that you overcome this particular obstacle with tact and diplomacy. Do not pretend that you have understood, to get you off the hook, as this will only cause problems later. It is much better just to ask the caller to speak more slowly - try to be patient. Remember that the caller could be bringing important and lucrative business to your company.

Keep Cool!

Sometimes you may have to deal with a caller who is upset and irrational and wants to complain. Listening skills are particularly relevant here. The caller needs to feel that you have really 'heard' them. Do not be tempted to get into an argument. Remain neutral and try to offer constructive advice.

In the same way, when it's your turn to make a complaint over the telephone, consider the person on the other end of the line. Try to keep calm - you will get a better response.

In either situation it is important to prevent your emotions from getting in the way. Stay cool and calm and whatever you do, **never** just hang up.

Promoting Good Listening Skills

There are a number of practical ways by which you can make your listening more effective. During the conversation, jot down key words as a reminder for later questions, make a note of what is being said and what is not said (listening 'between the lines' is a useful skill to develop).

Try to assess the caller and encourage them to talk. What are their feelings? Do they believe in what they are saying? During this process of assessment, try to stay neutral as emotive responses inhibit listening. You might like to make a note of key points and think about them while the speaker continues.

Hear the message

It is useful to test your understanding occasionally by asking questions or confirming the interpretation of a particular point. Check the meaning of technical terms, especially in an unfamiliar subject. You may want to probe deeper for a fuller explanation. When doing this you should remember to use 'open' questions. They are much more effective than a question requiring a simple 'yes' or 'no' answer.

Making supportive noises and words of encouragement lets the speaker know that you are listening. Gently challenge any ideas you are unhappy with allowing the speaker time to explain.

Summarise

When the conversation is coming to an end, make sure that you have understood everything correctly by making a quick summary of what was said. Allow the speaker to clarify any ambiguities and ask questions when necessary.

ACTIVE LISTENING

L Look Interested

Create a positive image in the caller's mind of you looking interested.
Maintain an upright and positive body posture.

I Inquire

Ensure you get the whole story by seeking clarification.
Use a variety of questions.
Come to important issues slowly.

S Stick To The Point

Stick to the point by stating your purpose.
Avoid saying 'yes but...'
Be patient and tolerant.
Refocus on the objective where appropriate.

T Test Your Understanding

Make an effort to listen actively by using summaries, both short and long, always being sure you understand before moving on.

E Evaluate The Message

Assess the information that you get by taking enough time to think about what is said to you.
Check any apparent anomalies.
Analyse what is said to you.

N Neutralise Your Feelings

You can only listen by staying calm.
Keep an open mind.
Retain your self-control.
Suspend your instant judgements.

The telephone can be a demanding boss. Have you ever had one of those days when the telephone just doesn't stop ringing? Every time you try to do something, off it goes again and every caller seems to be more demanding than the last one. What if every day was like this? For example, if you worked on a customer support desk. The pressure and pace of this type of job would certainly not suit everyone.

Keeping A Calm Exterior

Although it is essential to stay calm and in control when dealing with a business contact on the telephone, you will need to find some way of venting your frustration once off the phone, preferably in a positive way. When people have to be pleasant on the telephone, perhaps in contradiction to their real feelings, they often display their stress by snappy behaviour towards close colleagues or family members.

Even someone who appears totally calm might not be coping as well as they could. They may be bottling up their stress internally, until one day they just explode, become ill, or quit. For other people frequent periods of absence from work may be a coping mechanism.

Time To Relax

When things are busy and you are working under pressure, it is more important than ever that you allow yourself to let off steam. You may think that you are too busy to spare the time, but this is a false economy – in the long run, taking a few minutes to unwind makes you more efficient. If you break the stress cycle, shown on the next page, you will stay calm, efficient and in control.

When you feel you are becoming overwhelmed allow yourself ten minutes of relaxation or do a less stressful, more enjoyable task. Choose a method that best suits you and your working environment. If at all possible, leave your desk and walk about a bit.

Give Yourself A Breather

Breathing techniques calm you down and fill your body with vitality-giving oxygen. One method is to breath in slowly to the count of four, until your lungs are completely full; hold the breath for four counts; then empty your lungs to the count of four. Repeat ten times.

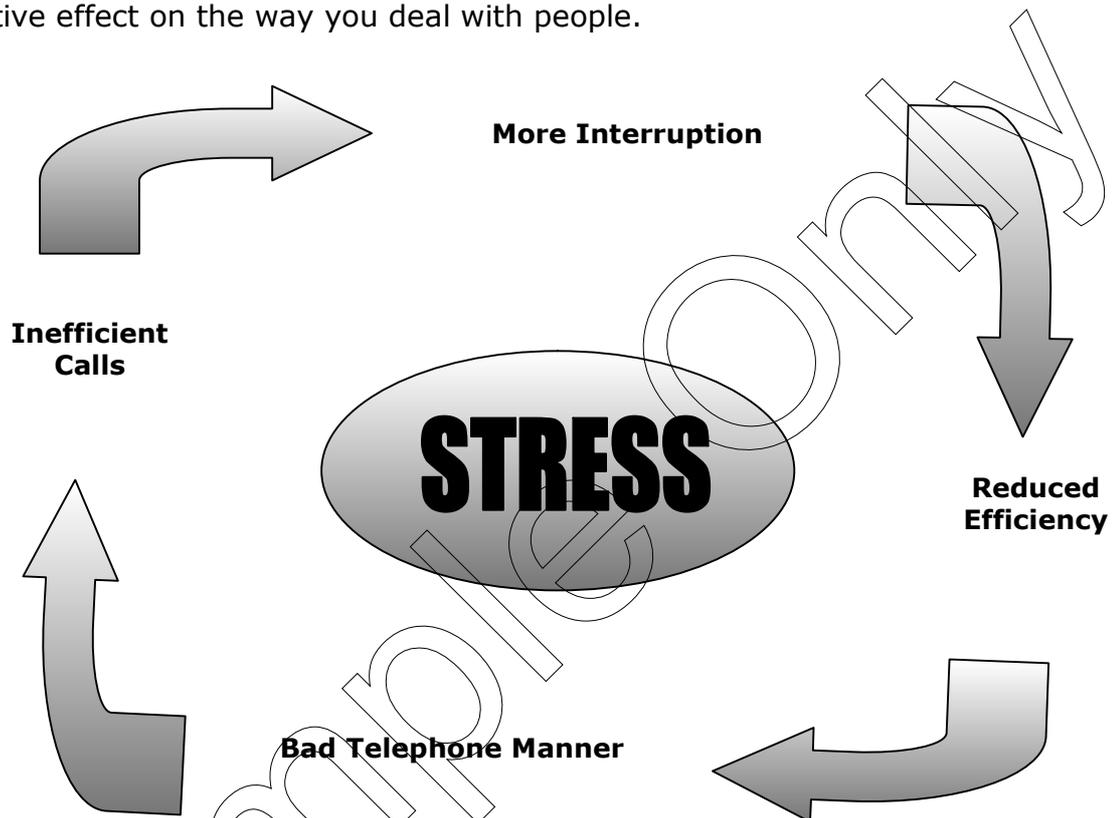
Another effective method for relieving stress is visualisation.

Just make yourself comfortable, close your eyes and think of a beautiful place where you felt calm and at peace. Try to imagine every detail, even the smell. You might like to put a picture of this place on your desk as a constant reminder of quieter, less stressful times.

Most of us carry our tension in our shoulders, but you can prevent them from knotting up with a simple exercise.

Circle each shoulder slowly in one direction five times and then the other, finally circling both shoulders together five times. Follow this with a big stretch, reaching up with your arms and allowing yourself a bid sigh.

These methods are marvellous for dealing with everyday stress, but in many ways we can avoid stress just by looking at a situation in a different way. View the telephone as your tool not your master. The more you allow it to dominate and control your day, the less efficient you will become, and this will have a negative effect on the way you deal with people.



Twenty Golden Telephone Rules

Answering the telephone is not a difficult physical task, but using it in a business-like and professional manner is not so straightforward. It is all too easy to believe that other people are causing the problem.

Could it be that they are reacting to the way you are dealing with them? Being effective, as well as staying calm and controlled, is quite a demanding task. You might like to appraise your own ability by considering the following questions. How often do you plan your telephone calls and how effective is your planning? How much time do you waste on the telephone? Are you helpful to callers from overseas? It seems that most of us could do with some help when it comes to using the telephone. A good place to start is with the 20 golden rules.

| | |
|--|---|
| 1 Be prompt, answer within three or four rings – callers don't like to be kept waiting. | 11 Repeat names, telephone and fax numbers and dates back to the caller to make sure that you have got them right. |
| 2 If you are going to be away from your telephone for any length of time remember to divert your calls so that the caller doesn't have to be passed around. | 12 Make notes, recording all necessary information. It was once said that 'a short pencil is far more effective than a long memory'. |
| 3 Answer with a smile – it comes across in your voice, making you sound friendly and positive. | 13 Double check all vital information, by reading back, in summary, what you have discussed. |
| 4 On answering, give a verbal handshake, announcing the company name and department as well as your own name. | 14 Instead of passing callers around between departments, take their name, number and a brief message, reassure them that it will be passed on and the appropriate person will call them back. |
| 5 When making a call, make sure that it is a convenient time for the other person to handle it. | 15 Give the caller your full attention. Nobody can hold two conversations and retain 100% information from both. |
| 6 Show empathy; build an instant relationship with your caller by using a warm, friendly tone of voice. | 16 Keep focused on the subject in hand and do not interrupt the caller with pointless questions. |
| 7 Establish the needs of your caller immediately by asking 'How may I help you?' | 17 Remember that both people engaged in a call have the right to know who they are speaking to. |
| 8 Use open questions to find out facts and information and also closed questions to clarify and check understanding. | 18 Agree any actions that either party will take. |
| 9 If you can, answer the caller's questions promptly and efficiently. If you can't help, tell them what you can do for them. | 19 Finish off your call on a positive note. Check that your caller has asked all the questions that they need to, and has all the information that they need. |
| 10 Use continuity noises to show the caller that you are listening. For example, 'oh yes', 'I see' or 'that's right'. | 20 'Sign off' properly. Although circumstances vary, this usually means confirming what will happen as a result of the call and thanking the other person for their time. |

Asking The Right Questions

Using effective questioning techniques allows you to get the information that you need. It should also help you to stay in control of the conversation.

When you are confronted with difficult situations, the use of different types of questions will help to diffuse the situation. The different types of question are: open, specific, closed, alternative choice, leading and hypothetical.

Open Questions

An open question requests information in a way that requires a fuller answer than a simple fact or a 'yes' or 'no'. As a result of asking open questions we should be able to gain enough information to give the caller a solution to a particular problem, or at least be in a better position to offer help.

Examples:

'How may I help you?'

'What information were you given by my colleague when you spoke with him yesterday?'

'Please tell me, what exactly happened and when?'

Specific Questions

Specific questions help to clarify points. There are two types of specific question: those which request a piece of information, and those which simply require a 'yes' or 'no' answer.

Examples:

'Who was it that you spoke with yesterday?'

'What is your daytime contact number?'

'Mr Jones, have you received confirmation of our last verbal conversation?'

'Are you always contactable on this telephone number?'

Closed Questions

Closed questions will usually produce a 'yes' or 'no' answer. They can be useful in the closing minutes of a conversation to confirm all the small details and to make sure that you have covered all that you need to.

Examples:

'Have you confirmed this information with my manager?'

'Is there any further information that you need from me at this time?'

Alternative Choice Questions

This type of question provides alternatives for the caller to choose from. These questions can be useful when dealing with difficult callers. Ask the caller what they would like you to do for them, but provide them with the alternatives that also suit you.

Examples:

'I could find out this information for you and telephone you with an answer by the end of the morning, or would you prefer me to fax the information later in the day?'

'Would you like me to get David to call you or can I help?'

Leading Questions

These questions help to speed up interactions; At times we seem to deal with people who find it difficult to make that final decision. Leading questions should help your caller to confirm the information in an easy way.

Examples:

'You would like to receive that information on a monthly basis, then?'

'So would you agree to a delivery on Thursday, if I can get you a discount?'

Hypothetical Questions

These questions test for a possible reaction from your contact. When used in a calm, conciliatory tone they can be useful questions to test the water in a conflict situation, where you are trying to suggest a solution.

Examples:

'If we were able to agree to this, how long would it take to set up the system?'

'If you want me to send this information, would you be able to submit details by return?'

Managing Time On The Telephone

The telephone can eat heavily into your time. It is both possible and essential to use the telephone in a time-efficient way. By invoking good principals and practices as a caller, you can gradually educate your regular callers in how to get the best from you without causing you unnecessary frustration or irritation.

Your callers will also feel better as they realise that doing business with you over the telephone is a pleasurable and professional experience.

So, what should you do to manage telephone time better?

Managing Incoming Calls

- ☎ Move incoming calls to outgoing blocks. Interruptions when you are busy are a nuisance. If you are engaged in something, such as a team briefing or writing a complicated report which cannot be interrupted, having someone to field your calls can be more productive. This way you can finish the important tasks and keep all of your calls for outgoing blocks to make at a time that is convenient. Managing your incoming calls and turning them into outgoing calls also helps you to be more prepared. Planning what you need to get out of each call is more productive than 'thinking on your feet' and it puts you in a better position to be able to control the call.
- ☎ Brief someone to intercept your calls for you, ask them to make a list of names, times, telephone numbers, the purpose of the call and any comments about the person who left the message – for example, a note letting you know that the caller sounded upset. Make sure that the person taking your messages is clear about what you want them to say to people who you are expecting to call. For example, if you are expecting a call from Mr Brown enquiring about an order, you may want the person fielding your calls to let him know that a delivery has been sent off. Make sure that they have the equipment they need to take down your messages. It is probably a good idea to provide a message pad with enough space for all of the information that you will need. You can then plan these calls into your outgoing blocks.
- ☎ Help the caller to get to the point by using the techniques of active listening. Try to keep the call on track by finding out as early as possible what the caller's message is. Remember to be polite and courteous, but do not allow the call to become long-winded. You may find that some people are 'difficult to get off the phone'. In such cases, take responsibility for closing the call.

Making Outgoing Calls

- ☎ It is more time-effective to keep all of your outgoing calls separate from the rest of your working day. Group your calls. Save up all of your outgoing calls for a convenient time and make them in blocks. To be even more efficient, you could prioritise them so that you make the most important calls first.
- ☎ Make an appointment for an important call so that you and the person you are calling are both well prepared. Call the person's office and if they are unavailable, speak to their secretary or PA or to a member of their team and arrange a convenient time for you to call back. Ask them to put a note in your contact's diary.

- ☎ The other person will then be aware of the importance of your call, if they weren't already, and should make themselves available to deal with it.
- ☎ Arrange to call back. Do not agree to being called back if the person who you need to talk to is out of their office or on another call. Stay in control; if your contact is unavailable, say that you will call back again and find out a convenient time to do so.
- ☎ If your contact is on another call, don't hold. Holding is infuriating and a waste of your precious time. Simply reschedule your call instead for a time when you know the other person will be free to take it.
- ☎ Get to the point. Avoid long-winded conversations. Some socialising can be important at times, but be as brief as possible. Plan what you need to achieve before each call, and get to the point of the call as quickly as possible. However, always remember to be polite and courteous.

Answering The Telephone

The moment you pick up a ringing telephone in your office you instantly become the most important person in your organisation. It doesn't matter who you are – the post boy or the managing director – to the person making the call you *are* the organisation, so it is essential that what they hear and the mental picture that they build from that is a positive one.

It does not matter who is calling. Even if it is a wrong number, a rude response will leave a bad impression of your company and who knows, in the future this could mean the difference between making a sale or losing business.

When answering a call, you should aim to do more than convey a good professional approach and image – you should be letting your personality come through. Behave in a way that you know will project the best impression, not only of you as an individual, but also of the organisation you represent. If you do this effectively, it is likely to influence the behaviour of the caller, resulting in efficient and confident call handling.

The First 30 Seconds Count

Getting the call off to the best possible start is a crucial element in being able to direct the flow of the call and stay in control. Try to answer the call as quickly as possible, but do not pick up the receiver until you are ready and concentrating on the call.

It is very rude and disconcerting for the person at the other end of the line if the receiver is picked up, followed by a dreadful silence, or worse, the sound of laughter or another conversation going on in the background.

Greeting The Caller

You are aiming to make the caller pleased that he or she chose to do business with you or your company. You are aiming to impress the caller with your knowledge, ability, helpfulness and courtesy. So answer the telephone with a smile and let the caller know immediately who they are dealing with. 'Good morning, sales department, Chris speaking, how may I help you?' This is known as giving a verbal handshake. This method of answering the telephone lets the caller know that they have your full attention and that you are pleased they have rung.

Body Language Does Matter

Even though the caller cannot see you, your body language is still important. On the telephone your voice can convey a lot of information about your general demeanour. It will automatically mirror your facial expression. The caller will be able to 'hear' a frown. In a similar way your tone of voice will be affected by your posture, so sit up straight.

Building Rapport

Get the caller's name. It is much nicer to speak to a person and address him or her by name, rather than speaking to an anonymous voice. You will find people are much more co-operative when you do this – salesmen have been using this technique for years.

Taking A Message

How often have you put the phone down after taking a message, only to realise that you haven't got the caller's number? We have all done it, and usually when we are frantically busy with other things. But it illustrates the importance of taking comprehensive messages. The failure to take down a message could, at the very least, lead to frustration and, at worst, lead to the loss of business.

Be prepared: have a pen and a notepad by the phone. There is nothing more unprofessional than scrabbling around for writing utensils while your caller holds the line. To help you take better messages, make up a telephone pad.

Transferring Calls

It is really annoying to make a telephone call somewhere and be greeted with the response, 'You've got the wrong person'. This answer implies fault on the part of the caller.

When taking a call like this it is important to reassure the caller that this is not a problem at your end. Find out who, or what department they should have been connected to, and tell them what you can do to help, i.e. 'I will find out if Mr Black is available and have your call transferred', 'I'm sorry I am unable to transfer the call from here, but I can transfer you to our switchboard and they will be able to help' or 'If you would like to leave your name, number and a message of the nature of the call, I will pass the message on and have Mr Black call you back'.

Keep the caller informed of your progress during the transfer. If there is no taped music on your holding system, let the caller know from time to time that you are still trying to transfer the call, this saves the caller from thinking that they have been cut off.

Voicemail

This is another of those technological innovations designed to help people at work that has succeeded in generating frustration, irritation and hostile behaviour. Although the invention is brilliant, its implementation and use is often appalling!

In its simplest form, voicemail is a glorified answering machine, yet as popular as answering machines are, many people still hesitate to leave messages. The idea of talking to a machine makes many people feel self-conscious. Yet properly used, an answering machine can be an effective business tool. However, most users don't know how to use voicemail to effect, and most organisations don't have a suitable voicemail policy.

What Do Users Do Wrong?

How often have you telephoned someone expecting them to be there, only to be put through to their voicemail?

The departure from what was expected (a human at the other end of the telephone) immediately takes us aback and, depending on the reason for the call in the first place, will often give rise to irritation or annoyance.

How Often Have You Heard:

'I am in today but away from my desk at the moment, so please leave a message after the tone...' This is a meaningless statement.

If you leave a message, it might be reasonable to expect a return call in, say, half an hour. When your call is not returned, you might call again, only to hear the same message. This time you will probably leave a disgruntled sounding message or just hang up in frustration.

Another common but vague message is 'I'm away from my desk for half an hour, so leave a message after the tone or call back later...' At least a time frame has been given, but the question that this message raises is 'half an hour from when? Now? 20 minutes ago?'

So, what should you do? Use common sense, think of the person listening to the message and anticipate the reaction your message might provoke. If someone telephones they usually want something that could well be vital to their plans for the rest of the day. Whatever the reason for the call, your message should illuminate and not irritate.

Give Specific Times In Your Message

'This is John Smith's voicemail on Tuesday 12th May. I will be away from my desk until 1130am today, so if you would like to leave a message, please do so after the tone...' Or give the caller an alternative contact. 'This John Smith's voicemail on Tuesday 12th, I will be out of the office until Wednesday 13th. Either leave a message after the tone or call Pat Roberts on extension 1179...'

Both of the above messages give specific information to help the caller. Although it is frustrating being unable to speak to you there and then, at least the caller will know when you will be available. They can then make a choice. When leaving a message always give your name, an explanation of who you are (if necessary), the day and time of your call, the purpose of the call, and the best time to be called back.

Being Assertive In Difficult Situations

It is easy to blame bad communication and bad behaviour over the telephone on other people, but we need to take a critical look at ourselves from time to time.

Understanding something about what makes people behave in certain ways and understanding why it is that we react in the way that we do is part of understanding how to use the telephone. When we feel uncertain or under pressure, we often overreact – afterwards thinking, 'I wish I hadn't said that...'

People have different perceptions of what they hear. The barriers to effective listening mentioned earlier, affect the way we deal with others over the telephone. Also, poor planning by callers often leads to overreactions.

Using the wrong word, phrase or even tone can evoke an extreme reaction from someone who in a face-to-face situation would have been perfectly friendly. So why does the telephone change a person's behaviour patterns? The principle factor is distancing. Some callers feel that from the safety of the telephone they can be as rude as they like. The telephone allows them to vent their feelings or grievances in the comfort of their own territory and they feel empowered by the fact that they are some distance away from the person they are abusing, so there is no chance of a physical fight.

Also because you can't see the other person, the telephone can have the psychological effect of dehumanising the interaction – it is a voice at the other end of the line, not a real person. If a caller is being difficult, it is easy to think this and to try to get off the line as soon as possible. But the voice does belong to a real person, someone who also has feelings, and to make positive interactions you need the skills to deal constructively with problem calls in a way that helps you and the caller.

Assertiveness And The Telephone

To help a disgruntled caller it is crucial that you keep control. However angry or frustrated the customer might be, he or she wants you to solve the problem. Be assertive about getting results in a way that you are both happy with. Assertiveness is about achieving equilibrium in the fastest time. If you are communicating on a calm, adult level, then anxiety is reduced and an agreement or compromise can be achieved. Both parties feel good, each person is aware of the other's feelings and so is able to see two sides of the story.

When receiving a call from someone who is unhappy or dissatisfied with something that you have said or done, or something they think you might have said or done, you must first show them that you have listened to what they have said.

The easiest way to let your caller know you are listening is to paraphrase what they have said in a positive, non-judgemental way. Any implied criticism will create a breakdown in communication.

Once you have the caller's attention, you can then tell them what you can do to help. Let your caller know what further action you are prepared to take to help the situation.

Assertiveness is about behaving in a confident, calm and reassuring way that helps you to control the situation. It is important that you do not negate the caller's feelings. The caller must be able to feel that they can trust you, and that you will do what you say.

3 Steps To Assertiveness

- 1 Show that you have listened to the other person. Paraphrase what they have said.
- 2 Say what you think or feel.
- 3 Say what you would like to happen.

Example:

"I appreciate that you need this information immediately, unfortunately I am not in a position to give it to you until it has been checked by our accounts department. I will get the information checked within the next hour and fax it to you then."

Giving Unwelcome News

Sometimes you will need to give bad news to someone over the telephone. This will require the utmost tact. You should make the statement as brief as possible, with a simple apology if appropriate. For example, 'I cannot make it to the meeting', 'I have to cancel our appointments for the 15th' or 'Unfortunately Tuesday's delivery will be two hours late'.

We should always acknowledge the caller feelings and point of view. For example, 'I appreciate that this might make it difficult for you', or 'I'm sorry to let you down at such short notice'.

We must then listen to their response and acknowledge it, exploring solutions or alternatives wherever possible.

Examples:

'I understand that you would like the delivery by 2 pm today. This is not possible, but we can get it to you by 11 am tomorrow.' 'I appreciate you are annoyed that we are unable to let you have this information. Unfortunately we are not in a position to help at this stage.

However, as soon as we do have all the relevant facts, we will let you have them.' 'I am sorry that you are having difficulty with your photocopier. Unfortunately all our engineers are out on calls at the moment. We will give your case top priority. In the meantime, is there an alternative machine you can use?'

Assertiveness Techniques

There are two techniques – repetition and fogging – that can help you to be more assertive.

Repetition:

This technique helps you to stay with your statement or request by using a calm repetitious phrase, in slightly different ways, over and over again. By repeating your request you can maintain a steady position without falling prey to manipulative comment, irrelevant logic or argumentative bait.

Using persistence you can deal with any situation. With the repetition technique up your sleeve, there is no need to rehearse arguments or worry about how you will cope with angry feelings beforehand.

Example:

'I need to have that information by 5 pm today.'

'I know you are busy, however I need to have that information by 5 pm today.'

'I appreciate what you are saying, however, I must have that information by 5 pm today.'

By the time you have repeated the message three times it should become acceptable to the receiver. It becomes very difficult for someone to ignore you when you calmly repeat what you want to happen. Eventually they have to listen.

Fogging:

This is a technique for accepting criticism without becoming defensive or reacting to someone's anger. The first step is to acknowledge that there might be some truth in the criticism. Then respond to the words that are being said, as opposed to the emotion in the tone.

An emotional outburst loses its power when the recipient does not react. It is like throwing a ball in the fog, it's unlikely to reach its target. When someone is very angry about something and they are taking it out on you – 'fog'.

Example:

'I'm sorry that you didn't receive the information today.'

'I appreciate that you are angry and I will send the information off to you today.'

Dealing With Conflict And Complaints

Feeling angry and emotional can make you less effective on the telephone because you are not able to concentrate on what the caller is saying. You can cope by using a technique known as 'negative feeling assertion'. This skill allows

you disclose your feelings with a simple statement, reducing your anxiety and enabling you to relax and take charge of your feelings.

Example:

'When you shout at me for not returning your call it makes me feel annoyed because I tried on a number of occasions to contact you, only to be told that you were either in meetings or out of the office. I would appreciate it if you would let me explain before you get angry.'

Discrepancy Assertion

This technique is used in situations where you are receiving contradictory messages. As before, it is important to be as objective as possible, pointing out the known facts without letting emotions cloud the issue.

Example:

'When we spoke earlier we both agreed that Tuesday would be a good day for the team meeting. Now you are saying that Wednesday would be better, I find it difficult when you make changes at the last minute.'

Workable Compromise

This is important to remember when there is a conflict between your needs and those of someone else. Assertiveness is not about winning: it is about negotiating from an equal position. This means finding a true and workable compromise, which takes the needs of both parties into consideration, giving them equal weight. Compromising on a solution to a difficult situation need not compromise your self-respect.

Handling The Behaviour Of Others

Most of our behaviour is learned, and we can make 'choices'. We know the difference between acceptable behaviour and inappropriate behaviour. What we need to do is recognise what choices we have. When we are faced with a difficult situation the survival instinct takes over, producing a gut reaction to fight or take flight.

We tend to either behave in an 'aggressive' or 'passive' way, even though neither of these types of behaviour is usually very productive. But you can choose to act differently – you can choose to behave assertively.

Dealing With Aggression

When people are upset or frustrated they can become angry, abusive, difficult and unreasonable – particularly on the telephone. You need tact and patience to handle both yourself and others in these circumstances. Use all your skills to project sincerity and professionalism.

There are specific interpersonal techniques you can adopt that will allow your caller to vent their feelings and get their anger out of their system and help to calm the situation, leading to either a solution to the problem, or allowing both sides to negotiate in order to come to a compromise.

Listen Actively:

Concentrate on the caller and listen both to the words they are using and the emotion behind the words. Allow the caller to vent his or her feelings without interruption. Let them know that you are paying attention and check your understanding of the situation by paraphrasing what they have said.

Acknowledge The Person:

Show empathy with the caller; try to see it from their point of view. Accept that they have a right to their feelings and acknowledge this. Treat the caller as an individual, with an individual problem.

Summary

Now that we have taken a comprehensive look at different ways of coping with the telephone, you should have some idea where your particular shortcomings lie. It may be that you have discovered by doing the various self-assessment questionnaires that you need to improve in many more areas than you had at first thought.

If that is the case, once you have identified the areas in which you wish to develop your telephone skills, you can put together a plan for improvement. Think about the areas of your job where you need to use the telephone on a regular basis and focus your attempts to improve on the areas where you are at your weakest or the areas that relate to the most important activities that you do at work.

For example, it is unfortunate if you forget where you have agreed to meet a friend for lunch, but if you do not note down an order for a customer correctly this could lead to the loss of future business.

YOUR NOTES:

Sample Only



Trainers notes:

Standard equipment:

Flip chart and flip chart pens
Projector
Pens & paper

Theory:

Rather than duplicate information, you can find most of our practical and well written theory which relates to these notes contained within the comprehensive candidate course notes. Please read through this, which will enable you to then explain all of the relevant theory to your trainees, using your own training delivery style. The candidate course notes can be copied as additional handouts, when you wish to expand/amend content etc.

All of our courses are designed to run over one or two days. Of course you can condense them into half day sessions.

Please note task timings are given as an approximate and may vary depending on your group size and delegate participation.

General housekeeping:

- ❖ Advise delegates of breaks, lunches (any special dietary requirements), finishing time.
- ❖ Is there a fire alarm planned for today? Advise nearest exit.
- ❖ Ladies and gentlemen's facilities.
- ❖ Turn mobile phones off or put on silent.

Talk through your session: Slide No 2

Advise the delegates that this course is an exciting mix of theory, discussion, tasks – both individual and group work. The course is NOT just theory.....

Introducing yourself: Slide No 3

Talk through with delegates "what they *really* want from their course" and what they enjoy about using the telephone.

Team task:

In groups of two

- ❖ Discuss the problems of using the telephone
- ❖ Discuss the benefits of using the telephone

Ideally detail the task on a flip chart. Allow the group 10 mins to generate their information on flip chart paper.

Upon completion ask each group to go through their thoughts.

Discuss and gain agreement from the other group.

Total time: 30 mins

Professional telephone manner: Slide No 4

Discuss with group

Questions: Do they do this every day? When do they think about this high standard? What happens when they do not deliver this standard often enough?

Individual task: How well do you listen?

Hand out question sheet and ask the delegates to respond to them.

Then hand out scoring sheet and ask them to score them.

Review scores - Highlight the questions that delegates have scored poorly on? What can they do to change/improve things? Give praise for higher scores and challenge delegates to maintain this high standard.

Total time: 15 mins

Individual task: The listening exercise

Fire works listening task and review

Total time: 15 mins

Listening slides: No's 5 & 6

Talk through theory

Asking questions: Slide No 7

This is the natural link from listening, ask questions to check understanding – talk through theory.

Tip – ask delegates to take a few minutes to write down good questions that they may ask on the telephone – linked to their business

Team task:

Write on flip chart:

- Discuss and list the benefits of the telephone.
- Discuss and list the problems of the telephone.

Allow the group 10 mins to generate their information on flip chart paper.

Upon completion ask each group to go through their thoughts.

Discuss and gain agreement from the other group.

Total time: 20 mins

The first 30 seconds: Slide No 8

Talk through the importance of external customers.

Who they hear first?

This can create a positive or a negative thought on the company overall.

Discussion points:

Greeting caller – hello/hiya!/yes

Body language – slouching/feet up

Building rapport – existing clients

Who can give an example of bad telephone techniques?

3 steps to being assertive: Slide No 9

Talk through theory

Individual task: How assertive are you on the telephone?

Hand out sheet and ask the delegates to complete as honestly as possible. Then hand out scoring sheet. Take some time to review and offer feedback and praise on the scores.

Total time: 15 mins.

Discussion:

Ask the group – Who has to deal with complaints on the telephone?
How does this make them feel?
Do they have a company procedure to follow?
What emotions does this generate and will callers hear these emotions?

Time: 10 mins

Complaints : Slides No's 10 & 11 & 12

Talk through this easy to follow guide

Team task: Role play or discussion scenarios

You have three reception scenarios to use. Depending on the enthusiasm of your group – you can either use them as role plays or as discussions.

Time: 15 mins each

Delegate action plan

Hand out course action plan and ask each delegate to complete it. This is extremely useful for trainees to practically implement their session into their day to day work role.

Time: 10 mins

Summary: Slide No 13

Finish by summarising **your** training session.

Task 1:

HOW WELL DO YOU LISTEN?

Categories:

A=always **U**=usually **S**=sometimes **O**=occasionally **N**=never

| | QUESTION | A | U | S | O | N |
|----|---|---|---|---|---|---|
| 1 | I always show interest in the person who is speaking | | | | | |
| 2 | I continue to listen even if the subject becomes boring | | | | | |
| 3 | I'm able to concentrate even when the subject becomes complex | | | | | |
| 4 | I try to create the right environment for listening | | | | | |
| 5 | I listen even when I have no knowledge of the subject | | | | | |
| 6 | I clarify points to make sure that I understand | | | | | |
| 7 | I regularly summarise key points | | | | | |
| 8 | I always give my full attention to the speaker | | | | | |
| 9 | I always show interest in the subject under discussion | | | | | |
| 10 | I always manage to control my emotions | | | | | |
| 11 | I always jot down key points of the conversation while it takes place | | | | | |
| 12 | I keep a note of the time and date of all my calls | | | | | |
| 13 | I always get the caller's name at the beginning of the call | | | | | |
| 14 | If the office is busy I face a wall to avoid distraction | | | | | |
| 15 | If the call is at an inconvenient time, I arrange to call back | | | | | |
| 16 | I read between the lines - listening to what is not said as well as what is | | | | | |
| 17 | I don't interrupt when the other person is speaking | | | | | |
| 18 | I try to give the caller my full attention when they are talking, rather than planning what I will say next | | | | | |
| 19 | I always clarify the meaning of words or technical terms that I don't understand | | | | | |
| 20 | I make continuity noises, such as 'yes' or 'OK' to show that I am listening | | | | | |

HOW DID YOU SCORE?

| ANSWERS | | | |
|-----------|----------|--------------|----------|
| Always | 5 points | Usually | 4 points |
| Sometimes | 3 points | Occasionally | 2 points |
| Never | 1 point | | |

80 - 100

Excellent: You have a very positive approach to using the telephone, and appear to listen carefully and to get on well with almost everyone. There may be some room for improvement. Examine your results in detail and see where your scores were lowest to get some indication of where your weaknesses lie.

61 - 79

Good: You seem to care about your callers, but you could be a little more positive in your approach. Keep working at it and try to stamp out your bad habits. Do not settle for being good when you could be excellent.

46 - 60

Quite good: You may need to develop your listening skills a little bit more. Look at areas where you scored least and try to improve those areas.

36 - 45

Need to Improve: You are sometimes a good listener, but at other times your caller could feel that you are not paying attention and you could be missing essential pieces of information. Look at the areas where you scored lowest and concentrate on improving. The practical ideas later in the course will be useful.

20 - 35

All areas need improvement: You are not paying attention to the people who you deal with on the telephone, perhaps because you are trying to do too many things at once. Take control and devote time spent on the telephone to the person on the other end of the line. Compare your answers with the ideal answers in the questionnaire and start to think about how you can improve. Set yourself realistic weekly targets.

Role play or discussion scenarios

Receptionist 1

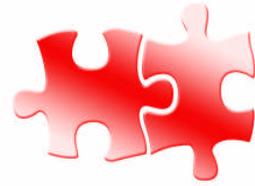
You have been playing catch up all day because you were an hour late due to your dog getting run down this morning (he will make a full recovery....) a big lorry went past you and covered you with mud on the way in. Your boss has been trying your patience and picking on you all day and now you are starting to get toothache! The caller wants to speak to someone who is in a meeting and can't be disturbed. How would you react?

Receptionist 2

Your best friend applied for a job with your company, she hasn't had a reply yet but you have heard through the grapevine that she didn't get the job. You really don't want to tell her and anyway it would be a breach of confidentiality. Now she is on the phone asking you to put her through to the personnel manager who isn't available. How would you react?

Receptionist 3

The personnel manager has issued a memo stating that anyone calling in sick in future has to speak to one of the personnel team (providing they are available). Someone you know quite well phones in sick but doesn't want to be put through to personnel. What do you do?

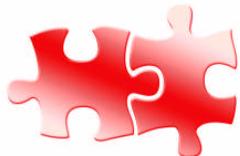


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Telephone Techniques

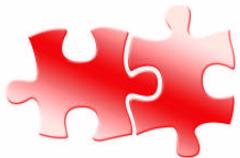
Your session

- The importance of using the telephone and what it means to the business
- Professional telephone manner
- How to **really** listen, with helpful hints and tips.....
- Receiving and making a telephone call
- Creating a **great** first impression
- Asking the **right** questions
- Do's and don'ts – Complaints
- Being assertive on the telephone
- Useful and practical exercises
- Discussion scenarios



Introducing yourself

- Your name
- Describe your day to day job
- What do you enjoy about using the telephone?
- What do you **really** want from your course today?



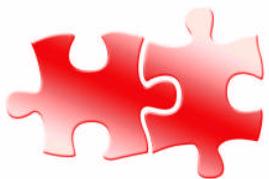
Professional telephone manner

- **Prepare carefully and note down objectives**
- **Sit upright to avoid constricting your voice**
- **Speak clearly, pace yourself, keep the tone natural**
- **Be polite, leave your contact with a good impression**
- **Avoid slang, jargon, choose your words carefully**



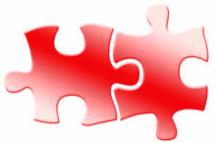
Active listening

- **L**OOK INTERESTED
- **I**NQUIRE
- **S**TICK TO THE POINT
- **T**EST YOUR UNDERSTANDING
- **E**VALUATE THE MESSAGE
- **N**EUTRALISE YOUR FEELINGS



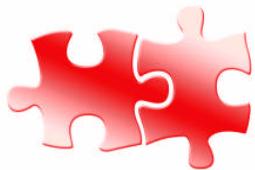
Listening tips

- Get the surroundings right
- Concentrate and persist
- Don't start having a silent chat with yourself.....
- Take notes
- Ask questions to test your understanding



Asking questions

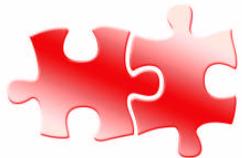
- Open: **What**, When, Where, Which, Why and How
- Closed: Yes or No answers
- General: Feelings, opinions
- Directed: Tom you mentioned that...
- Reflective: Are you saying that...
- Rhetorical: Is this what you call a day's work



The first 30 seconds

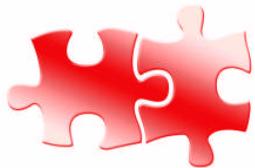
- Greeting the caller
- Body Language does matter
- Building rapport

“You never get a second chance to make a good first impression” – Dale Carnegie



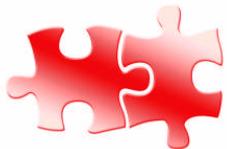
3 steps to being assertive

1. Show that you have listened to the other person
2. Say what you think or feel
3. Say what you would like to happen



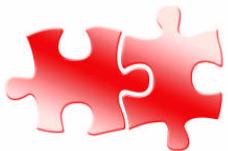
Complaints – Do's

- **Introduction**
 - **Use the callers name**
 - **Treat the caller as an individual**
 - **Speak clearly and take your time**
 - **Accept complaint**
 - **Show empathy for the callers feeling**
 - **Use a calm & reassuring voice**
- **Ask questions**
 - **Use open questions**
 - **Give the caller all the time that you feel is needed**
 - **Be responsive to the callers needs**



Complaints – Do's

- **Listen, empathise and reflect**
 - Accept the caller has the right to feel how they do
 - Summarise what the caller has said
 - Recap certain points to show that you have listened actively
 - Let the caller get it off their chest
- **Suggest options**
 - Suggest the benefits of your proposal to the caller
 - Phrase the suggestion with an open question



Complaints – Do's

- **Reaching agreement**
 - Plan the steps in your bargaining procedure
 - Start lower, but be prepared to move up
 - Continue to acknowledge the callers right to feel upset
- **Agree & confirm**
 - Check the details with the caller
 - Tell them what will happen next
 - Invite them to come back to you in the event of any other queries
 - Tell them you are happy to have resolved the situation



Summary

- Understanding the importance of the telephone to the business
- Listening – Asking questions
- Using assertive behaviour, not being aggressive
- Maintain a professional approach & attitude
- Handle complaints in the right way

