



**INNOVEST SME**

Accelerating Small Business

# Training Contact Centre Teams

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*We have two ears and  
one mouth, so that we  
can listen twice as  
much as we speak.*

EPICURETUS

# PREFACE

For many people, the term Contact Center relates to sales calls and telemarketers. There are so many avenues that a contact center can be of assistance within a company that do not pertain to sales calls. A contact center can provide customer support, information technology support, and much more. The key to having a great customer experience using a contact center is in the training. A well trained contact center can be the difference between gaining more customers and losing customers. Customers want a well-educated agent when they contact a business. They want to know that the person answering their questions knows what they are talking about. Training your staff, and giving them the information that is needed to effectively assist your customer base is paramount.

*If you're not serving the  
customer, your job is to be  
serving someone who is.*

JAN CARLZON



# IT STARTS AT THE TOP

There is a very common saying, 'Attitude reflects leadership.' A manager sets the tone for the whole staff. If a manager shows the staff that having the appropriate information is important, it will be more likely to be utilized. You can help your staff be the best contact center possible by creating an open culture, knowing the goals of the company, knowing your employees job duties, and being able to identify additional training opportunities. A manager has to have their eyes peeled at all times for new information needed, and new ways to deliver that information.

## CREATE AN OPEN CULTURE

When you are a manager, it is important that you create an open culture with your staff. What is an open culture? An open culture means that as a manager, you are creating an environment where employees feel free to share ideas and concerns. This type of environment helps employees feel empowered and important, which helps them want to come to work and do a great job. When an employee starts to feel like they don't matter to a company, it can bring down not only the whole department but the company itself. Here are some ideas that will help you create an open culture in your company:

- Loose the door – taking out the door or leaving your door open tells your staff that you're available for them.
- Don't be secretive – you are not working for the Pentagon, tell the staff what's up. When you as a manager keep secrets, it has a tendency to make the staff feel paranoid, and/or unimportant.
- Recognize that change is not always black and white – change can be hard on anyone. There will always be the good with the bad. Let your staff tell you their opinions on changes that were made. Be open to their concerns and suggestions
- Have one on one training sessions with your staff members- this helps the staff members get to know management on a more personal level, and makes them more likely to voice concerns or suggestions later on.

## **UNDERSTAND GOALS**

The worst thing a manager can do is to not understand the goals of the company. This entails looking at the company as a whole, in a large scope. Try asking yourself, and your supervisor these questions:

- What is the company trying to achieve?
- What are the company's long-term and short-term goals?
- What does the company need in order to accomplish these goals?
- How can my department help facilitate those goals?

Without knowing where the company itself is wanting to go, you won't know how to get there. Talk to your own supervisors to understand the goals of the company. Once you understand what the company wants to accomplish, you can set goals for your staff. When setting the goals for your staff, make sure to be very clear about the goal that you want to accomplish, and the steps it will take to accomplish it. Make sure that the goals you set are realistic.

## **UNDERSTAND AGENTS' RESPONSIBILITIES**

There is nothing worse, from an employee standpoint, than a manager that doesn't understand the job duties and processes of an employee. If the manager doesn't understand responsibilities of a contact center employee, how is the employee supposed to understand them? Take the time to talk to your supervisors so that you know what is expected of your employees. If you are a new manager, asked to be trained as if you were one of your employees. This way you can see the processes, and learn how to improve them for your employees and customers. Knowing their processes and what their job responsibilities are also helps you train future employees.

## **IDENTIFY EDUCATION OPPORTUNITIES**

There is never a point when an employee has learned too much. Employees who learn are more engaged in their jobs. As a manager it's your job to make sure that your employees remain engaged, and are effective in their positions. You can see what training or education

would be beneficial to the company and employee. Having educational opportunities helps maintain employee engagement, thus retaining more employees. Engaging employees helps them feel important and part of the company, instead of just another lackey. Education opportunities can come in many shapes and sizes.

Here are just a few different educational opportunities your company could provide for your employees:

- College tuition reimbursement
- Cross Training
- One-on-one training
- Seminars & workshops

Having these education opportunities helps the employees feel like the company cares about their personal growth. Happy employees create happy customers.

## **PRACTICAL ILLUSTRATION**

Liam has been hired as a new member of the management team at Schneider & Associates. Emma is Liam's supervisor, and she wants to make sure Liam has the resources he needs to succeed. She works one on one with him, and explains the company's goals. She tells him about the Open Door policy, and how important it is that he is available for his staff just as she is for him. Emma has Liam train with one of the company's top performers in his department. She wants him to know

the processes in which the employees perform their tasks. While Liam trains, he asks the employee questions about what they would change about their current processes. He gets some ideas on how to improve their procedures. Liam is very excited to help his employees be the best they can be.

*It is easier to do  
a job right, then to explain  
why you didn't.*

MARTIN VAN BUREN



# PEER TRAINING

Peer training is an important tool in any manager's toolbox. Peer training gives employees many advantages. Peer training includes training with top performers. Peer training also helps an employee understand their role within the company. The manager has the benefit of getting to hear and critique previously recorded calls. Lastly, the employees have the benefit of cross training.

## TOP PERFORMING EMPLOYEES

Training with top performing employees helps the top performers and the trainee feel valued. Training with top performers also allows employees to gain useful information about the job, and hopefully pick up some of the traits that the top performers have. Training with top performers also gives the training employee more familiarity with their co-workers. So how do you know how to spot your top performers?

Here are some traits that you can look out for when determining who your top performers are:

- The employee is reliable
- The employee is able to build good relationships with co-workers
- The employee excels at problem solving.

- The employee has a high productivity rate.
- The employee is well educated about their job duties.

## **DISCUSS ROLE WITH COMPANY**

Whenever you meet a new person, one of the most common questions is, “*What do you do for a living?*” You don’t want that answer to be “*Oh, I’m not sure!*” An employee can’t do their job effectively, if they don’t understand what their job is. Understanding how that job affects the company helps the employee want to do their job better. Employees want to know what the big picture is, and how they are involved in that picture. In the end it’s all about keeping employees happy, motivated, and engaged. An employee that feels like they are important to the company works harder for the company.

## **CRITIQUE PREVIOUSLY RECORDED CALLS**

Coaches film their athletes’ games so that they can study them and see how the players can improve. Having that footage lets the coach and the players review every move. It helps them see what was done right, and what was done wrong. Just like a coach, you and your employee can review calls. Taking the time to listen to the calls, and showing the employee what they excel at, and what they can work at is important. It shows the employee that you value their hard work, and want to help them be the best that they can be. When critiquing calls it’s helpful if you create a worksheet to help you evaluate the calls. This way you can make sure to that you are evaluating the entire factor. It’s beneficial for the

employee and the supervisor to fill out their own critique, and compare notes. What are some items that you could put on your critique?

- Tone
- Scripting
- Inflection
- Correct information given
- Length of Call

## **CROSS TRAINING**

Every part in a machine is important, because these parts collectively make the machines work. When one of those parts breaks or goes missing, the machine stops working. Then you have to take the time, energy, and money to repair the machine. The repair slows down productivity, which causes the company money and potentially customers. Your company is the machine, its parts your employees. Whenever a company loses an employee, resources are expended in order to replace that employee. Productivity is lessened which impacts the company financially. Now imagine a machine in which the parts are interchangeable. That when one part breaks, the other parts pick up that slack. Cross training gives your company that ability. To have employees that can pick up the slack when one of your employees quits or is fired. Cross training also helps teambuilding within the company. There are so many benefits of cross training, both on the employee side and on the company side. Here are a few different areas in which cross training is beneficial.

## **Employees:**

- Allows employees to be promoted from within the company.
- Raises an employee's job satisfaction and engagement.
- Builds relationships between co-workers.
- Allows employees to build relationships with employees in the other departments that they may not have had a chance to build before.
- Makes the employees more motivated.
- Helps employees gain new skills, making them more effective for the company.
- Employers:
- Employees are able to take the place of a displaced worker.
- Supervisors are able to identify skills that would have been otherwise overlooked.
- Discover which employees have leadership in the department.
- The department morale is higher because employees are getting to learn new skills and feel empowered.
- Team work rises.
- Employees work more efficiently and are more productive.
- Could potentially reduce the number of employees needed by the company.

## **PRACTICAL ILLUSTRATION**

Noah is new to the company, Mercy Incorporated, which is a company that helps place customers with physicians. His supervisor has put him with Olivia for training. Olivia is one of the top agents at Mercy Inc. She excels in customer service, knows how to take calls quickly, and always goes the extra mile for her customers. Noah is very excited to be starting his new job, and to be training with such a qualified teacher. Olivia takes the time to introduce him to the team, tells him about his new job responsibilities, and how his job affects the company. After a little training, Olivia lets him take a few calls. After the calls, they listen to them together. Olivia tells Noah what he did correctly, and what he needs to work on. Noah really appreciates that feedback because he wants to do the best job he can for the company. He loves that he gets to help people, and that there are many cross training opportunities for him in the company, so he has plenty of advancement opportunities.

*If you build a  
great experience, customers  
tell each other about  
that. Word of mouth is  
very powerful.*

J E F F B E Z O S



# HOW TO BUILD RAPPORT

Building rapport with your customers is a crucial part of any contact center. Rapport can help the conversation run smoothly, creating an enjoyable conclusion for the customer. Rapport, in this context, means creating a harmonious connection between the agent and the caller. Building a rapport with your callers makes them want to call back when they need to. This helps build your client base, thus building your company's revenues.

## SMILE IN YOUR VOICE

One great way to start building rapport with your customers is by having a smile in your voice. No one wants to call and talk to a grumpy employee. Having a smile in your voice puts the customer at ease and makes them feel welcome to call. Also having a smile helps your inflection on the phone. How do you keep a smile in your voice during a phone call?

- Answer the call with a smile, a real smile! Caller can hear your smile, and it will make you more genuine.
- Utilize a mirror to remind yourself to smile when you are taking a call.
- Have pictures around that bring a smile to your face.

- Remember to leave your baggage at the door, and keep yourself upbeat.

## **ENGAGE IN SMALL TALK**

Small talk is basically engaging in polite conversation on topics that would not spark an argument. Most common small talk topics would be the weather, sports, movies, music, or family. You want to avoid topics like religion, topics of a sexual nature, death, politics, or anything too personal. Small talk is an important social tool both in your personal life and in your professional life. Learning the art of small talk can help you in a multitude of situations. When you are having a face to face conversation with someone, having long pauses with no one talking can be very awkward. Having a long pause on the phone is even worse. Thirty second pauses feel like endless gaps of bleak abyss. The caller doesn't know if you're disinterested, not competent at your job, or have lost connection. Small talk helps the customer say engaged, and feel like you care about giving them great customer service.

### **Here are a few small talk tips and tricks:**

- Start the call with introductions, and appreciation. Example:  
*"Hello, Thank you for calling (company name), my name is (name), to whom do I have the pleasure of speaking with today?"*
- Remember and use the customer's name.
- Refrain from using short answers, like yes or no. Your elaboration can help draw the customer out into the conversation.

- Ask questions, listen, and repeat. Repeating some of what the caller tells you shows them that you are listening to them and interested in helping them.
- When you have to do something like looking something up for the customer, talk about something you and the caller have in common, even if it's the weather.

## **LISTEN, ACKNOWLEDGE, AND EMPATHIZE**

When you're on a phone call, you are at a disadvantage. The caller cannot see you, or view your facial expressions to know that you are listening to them. To make a call as smooth of an interaction as possible you want to listen, acknowledge, and empathize.

Listening sounds like an easy step, but it might actually be the hardest. Sometimes a contact center agent can get hyper focused on the task at hand, and forget to use their ears. We often forget that there is a difference between hearing and listening. Hearing means that you are hearing the noise, but listening means that you are taking in and retaining what is being said to you. To listen, first you have to let the caller talk without interrupting them. If necessary, take notes on what they are saying, so that you don't have to have them repeat a lot of what they have told you.

To acknowledge, you will want to summarize the prominent points the caller has gone over. This would be the time in which you could ask questions for clarification. Another good tool would be to repeat some of what they were saying, using their words. This lets the caller know that

you are interested in helping them, and have listened to what they have said.

Lastly, express that you empathize with your caller. What is empathy? Empathy always gets confused with apathy. Empathy means you have the ability to grasp and reciprocate the feeling of the caller. Sometimes you have to put yourself in the caller's shoes, and show them that you care about their issue. You can express empathy by using phrases similar to these:

- *"I understand how this situation could be frustrating to you"*
- *"I recognize how complicated this process can be"*
- *"I can't imagine how upsetting this is for you"*
- *"I would feel the same way in this situation"*
- *"I sincerely apologize that this has happened to you"*

## **BE YOURSELF**

You may not be in person, but even over the phone people can tell when you are not being yourself. You were hired for your position, so that alone should validate that you are good enough! When you start trying to be someone else, it makes you seem inauthentic. This makes the call itself awkward, and makes the caller feel like you are being untrustworthy. You don't want a customer to walk away from a call feeling like they have not been helped. So be yourself, and celebrate your quirks, but remember to keep it professional!

## **PRACTICAL ILLUSTRATION**

Ethan has been struggling with his calls. His customers seem to always been dissatisfied with the services he is providing. While he does follow company protocols, and scripting, the calls never seem to go well. His supervisor Ava has monitored the calls, and thinks she has some tips to help him with his customer satisfaction. She starts by reminding Ethan that he needs to smile before answering the call, and try to keep that smile throughout the calls. She also suggests that instead of sticking to his rigid scripting, that he mixes in some small talk with the scripting and remembers to be himself. She notices that, while he is not rude, he needed to work on listening, acknowledging, and being empathetic. She tells him that he is a great asset to the company, and these small tweaks could be the difference between him being a regular employee or a top performer. Ethan takes the advice that Ava has given him. He notices that within a few calls the callers seem happier with him and his service. He becomes more comfortable with making small talk with the customers, which also ends up helping him relax more in the calls.

*We have two ears  
and one mouth, so that we  
can listen twice as much  
as we speak.*

EPICURETUS



# LEARN TO LISTEN

Communication is a two-person job. One person has the job of talking, and the other has the job of listening. The person who has the job of listening has the hardest job, because they have to take in and retain what is being said. A lot of times listening is taken for granted. Listening is a skill, without it, communication is pointless. How are some ways you can utilize your listening skills in a contact center? In the next section we will determine what is needed to make your listening effective.

## ALLOW CUSTOMER TO TALK

In a conversation, there is the person who talks, and the person who listens, that part is pretty basic. These roles can be interchangeable, but there is always someone who takes the lead on talking, in this context that should be the customer. As we have talked about before, it is very common for a phone operator to become too focused at the task at hand and forget to use their listening skills. No one likes to be interrupted, so a contact center agent has to make sure to be patient. Customers who are constantly interrupted start feeling like they are being rushed, or that you are not invested in assisting them. You want to give the customer 100% of your attention, and make sure you understand their needs and feelings. Sometimes you will get customers that just need to vent their frustrations, and sometimes you will get customers who have a hard time expressing

their needs. Allowing the customer to finish talking, uninterrupted, will show them you value them as a customer and are ready and willing to help them.

## **AVOID JUDGMENT**

Just as you don't want to judge a book by its cover, you don't want to judge a caller by a small breach of your own personal code of ethics. While we may not mean to, we all are guilty of giving into our personal prejudice tendencies from time to time. Succumbing to these preconceptions is very unfair for the callers though, and should not be tolerated by any supervisor. A contact center agent's job is to assist callers. It's important to keep your own bias out of mind when talking to a customer. Your own feelings don't matter, it's a business call, and important to keep professional. There is always going to be a caller that says something, or presents themselves in a way that triggers your own personal bias receptors. You have to treat every customer exactly the same, and make sure that you keep any personal feelings you have about the caller or the situation to yourself. You never know, you could make a big impact on the caller, and they could make a big impact on you.

## **TAKE NOTES**

There are many benefits for taking notes during a call. The main reason is to jot down important questions, or comments the caller has made, so that you can clarify with them after. You don't need to write down everything they say, just the highlights. This way you can stay engaged

in the call, but still be able to refer back to key aspects of what's already been said. When you are a contact center agent, you will get all different types of callers. Some callers will have, what feels like, twenty different reasons for calling that day. Taking notes with these callers can help you clarify what their needs are, to better assist them. Sometimes you will get callers that talk in circles, gets off track, or rambles. Those types of callers are hard to follow, and taking notes can help you sort through the dust and dirt of the conversation to uncover the issue or reason of the call. Unfortunately sometimes you will also get an annoyed or irate caller. These callers are already upset, and having them repeat what they've said can make the situation worse. Taking notes with these callers lets them know that you've listened to what they've said, and that you want to help.

## **RECAP THE CALL**

Another way to show the caller that you are listening to them, and actively trying to understand their needs is to recap the call. This means that you summarize the call after the caller has finished talking. When you do this, you want to try to use some of their words or phrasing. This shows them that you've taken an interest in assisting them today. Recapping the call also gives the caller a chance to correct any misunderstanding's prior to moving forward with whatever the task at hand may be. You want to avoid any mocking or sarcastic tones when recapping the call. Some acceptable phrases would be:

- *“Just so that I understand you correctly...”*

- *“So, I understand that today you need assistance with...”*
- *“I just want to clarify that you have stated...”*

## **PRACTICAL ILLUSTRATION**

Lucas has been working at King Communications for the past three years. King Communications is the area’s leading telecommunications provider. Part of what makes the company so popular is that customers are able to use their online portals to make changes to their accounts. Lucas’ job is to help customers access their online accounts, and troubleshoot the internet errors that may occur. Lucas is one of the top agents at King Communications, because he is so patient with the callers, he has the highest customer satisfaction rate. Isabella has just started at the company, and has been placed with Lucas for training. He tries to impart his years of knowledge, and customer service experience to Isabella. Isabella learns the benefit of allowing the customer to talk, avoiding judgment, taking notes, and recapping the call. Lucas and Isabella practice with mock phone calls, and by listening to some of his phone calls. Isabella is excited and hopes that she can be as good of a customer service agent as Lucas is.

*In the world of Internet  
Customer Service, it's  
important to remember  
your competitor is only one  
mouse click away.*

DOUG WARNER



# MANNERS MATTER - ETIQUETTE & CUSTOMER SERVICE (I)

In any industry, customer service is one of the most important aspects of the business. When you are not face to face with someone, little nuances like body language and facial cues are not able to be used to convey that you want to help the customer. Contact centers only have the words they use and the tone or inflection of their voices to convey the message that they are here to help. In this chapter, we will discuss the tools needed to display to your customers that you have good etiquette and customer service. We will discuss scripting, dead air, tone, inflection, and how to say things the right way. Following these simple steps is how your employees will start on the path to giving excellent customer service in your company's contact center.

## SCRIPTING

When you have a contact center, there are scenarios that commonly occur. Scripting is a set response that the company determines they would like the contact center agent to say in certain situations. For example, an IT

help desk contact center might have a lot of callers needing assistance with resetting their passwords. So, the supervisor might have a script for the agents to follow regarding password reset. Having a great customer experience means giving consistent good service. One way that you can consistently give great customer service is by using scripting. Scripting allows the agents to convey the same message and processes to all customers. Here are some additional benefits to scripting:

- Helps prohibit errors from being made.
- Reminds agents of the processes that your company implements.
- Gives consistent responses to callers.
- Gives the agent confidence, and knowledge on how to handle customer issues.
- Increases job retention.
- Reduces length of training.

## **DEAD AIR**

Dead air is a phenomenon that happens quite a lot in contact centers. Dead air is when there is an extended silence between the agent and the customer. For a caller, this could be a very uncomfortable and long pause. A few minutes could feel like hours to a customer, which makes them feel like you are disengaged from your job, and that you maybe do not have the experience needed to assist them. Here are some other tactics for killing your dead air problem.

- Explain what you are doing while the customer is on the line.
- If you must complete a process that takes a few moments, put the customer on hold so that they are not waiting in the limbo of dead air.
- Engage in small talk with the customer

## **TONE & INFLECTION**

Tone and inflection can make a break a call. Conveying a positive tone and inflection would aid in your customer feeling like you are willing, able, and competent to help them. So, what is tone and inflection? Tone is the sound or pitch of a voice. Inflection is the change in how a word is said that can express mood. This could mean speeding up or slowing down your speech. When an agent is monotone during a call it tells the customer they are disinterested in assisting the caller. Having a higher pitched tone could convey that the agent is interested in assisting the caller.

## **SAYING IT THE RIGHT WAY**

When you are a contact center agent, there may be times where you must deliver some unpleasant information. The goal is to relay the information, without creating a disgruntled customer. Knowing how to craft your words in a more positive way could help the reaction your customer has. Crafting your words is not limited to giving bad news to customers. The most helpful tip is the most obvious, think before you speak. Here are

a few examples of how you can craft your words in a call. These skills are important, not just for phone calls, but in every day personal and professional life.

## **PRACTICAL ILLUSTRATION**

Mason has bought a new computer, but is having some problems with it. Whenever he tries to go online the system suddenly shuts down. He calls the IT support line for the computer manufacturer, and is connected to an agent named Sophia. Sophia answers the call but doesn't give her name, which prompts Mason to have to ask her for her name. This starts the call off negatively, because Mason already feels like she does not want to assist him. Regardless he trudges along, and tells her what the issue he is having with his computer is. Sophia says ok, and then doesn't say anything else. Mason waits for a few minutes, but then becomes concerned he has been hung up on, so he says "hello?" She abruptly tells him to hold on, that she is working on his issue. She then puts him on hold, and he is on hold for a long time it feels like. When she comes back online she tells him that his issue is with the internet provider, and not the computer, then disconnects the call. Mason is so upset by this he returns the computer, and vows never to buy that brand again.

*Thank your customer  
for complaining and  
mean it. Most will never  
bother to complain. They'll  
just walk away.*

MARILYN SUTTLE



# MANNERS MATTER - ETIQUETTE & CUSTOMER SERVICE (II)

Your manners are always important, but it can be hard sometimes to convey them when you are on a phone call. In this section we will discuss more of the ways you can give great customer services and maintaining good phone etiquette. Some of these techniques include learning how to read your customers. We will also discuss how to properly transfer calls. Then we will address going the extra mile for your customers. Lastly, we will talk about how to limit given information, and when that is appropriate. With these tools in your tool belt, you will be ready for any call!

## “READING” YOUR CUSTOMERS

In this context, ‘reading’ your customer, just means that you are using their sub-textual cues to see their mood. In person, you have the advantage of reading someone’s body language for subtle cues on how to handle a situation. If you notice that a customer is already aggravated, you might adjust your phrasing to smooth over the situation. When you are on the phone you do not have the luxury using body language cues. You have

to use subtle cues that the customer gives you, like their tone. If the customer is talking very quickly, and in a sharp tone, then they may be upset. Use these cues to better serve your customer, and potentially avoid any conflict.

## **PROPERLY TRANSFERRING CALLS**

Have you ever called somewhere, and you've told someone your issue, and abruptly you hear phone ringing and someone else answers? I think as customers we have all been there. It is very frustrating for the caller, because they are not being told what is going on. As a contact center agent, your goal is to help the customer to the best of your abilities. There will be times when you are not able to help a customer with a particular issue. In these times, it's important for you to transfer the call properly. So what are the proper steps for transferring a call?

1. Make sure it's not something that you can help them with.
2. Tell the caller why you are connecting them to another person.
3. If able- introduce the call. Talk to the other agent first, to let them know of the situation, and give any relevant information so that the customer doesn't have to repeat everything. This step will also aid in making sure they are being sent to the right employee.
4. Connect the call, if able stay on the line for a moment to make sure the call connects appropriately.

## **GOING THE EXTRA MILE**

A call center agent's whole job is customer service. Sometimes that means going the extra mile to make sure the customer is taken care of. Going the extra mile for a customer could be something as small as telling them to have a great day at the end of a call, or something as complicated as sorting through hundreds of faxed documents to find theirs. People, as a whole, inherently want to do well. Whatever services your contact center provides, encourage your employees to go the extra mile for their customers. You can reward them for the job well done. This reward could be given in the form of a "great job!" thumbs up, or even a raise. Employees just want to know that they are being appreciated for their hard work, and if they feel appreciated they will work harder for you as a supervisor. Using this encouragement to motivate employees to go the extra mile will significantly improve customer satisfaction, and will give your employees a sense of accomplishment.

## **LIMIT INFORMATION**

Sometimes giving the customers information on the process that you're completing is good, because they can understand why it is taking you some extra time to assist them. Sometimes though, you can give a customer too much information. As a supervisor you want to inform your employees on what information is good for them to share, and what they should refrain from sharing with the callers. Sometimes it's better to not share with the customer 'how the sausage is being made' in a manner of

speaking. Too much information can make the customer confused and disgruntled.

## **PRACTICAL ILLUSTRATION**

Vita Corp is a vitamin supplement supply company. Oliver has recently started taking a supplement to help him with his arthritis. He has some gastric issues also, and wanted to consult with the company about what they offer for that type of ailment. He calls the customer service line on the bottle and is connect to an agent, Mia. Mia is a registered nutritionist, and she is able to tell him about the multitude of supplements that could help Oliver with his various ailments. Mia can tell on the phone that Oliver is a little apprehensive about the supplements, so she goes into detail about how they would benefit him. She also tells him that she will send him a pamphlet with this same information, so that he can review this with his doctor prior to taking them. Before Oliver disconnects the call, Mia also tells him that she is going to connect him to the company's promotions department, to see if there are any special offers they are having to help save him some money. Oliver is very impressed by the care the company gives its customers. This one call has made him feel like being a lifetime customer.

*The purpose of every  
business and organization  
is to get and keep  
customers.*

S H E P H Y K E N



# HANDLING DIFFICULT CUSTOMERS

In any business where customers are involved, there will be disgruntled customers. How do we handle these types of customers? It can be very difficult to help a customer who is screaming or talking down to you. We will go over in this section some different ways that you can handle these types of customers.

## KEEP CALM

We've all experienced dealings with people who could bring out the worst in us, if we allow it. Whether it's what they say or how they say it, we sometimes feel like that's our cue to respond in the same manner. As a professional, it's your job to diffuse the situation and not enable anger or panic to take control.

What are some ways for you to stay calm in the situation?

Deep breathing. This is a well-known relaxation technique that will help reduce the stress and anxiety that can come with such a situation.

Realize the customer is not mad at you, but the situation. As a contact center agent, you are the first line of defense. When a customer calls

in, he/she is not typically looking for you in particular to express their displeasure. You just happen to be the one who answers the call.

Reassure the customer. Let the customer know you are there to help. This reassurance will calm the customer, which will in turn, calm you.

## **LISTEN, REPEAT, AND**

Customers always want to make sure their issues are heard, understood, and acknowledged. The simplest way to do this is first by listening. This doesn't mean let the customer vent and you do other things while the customer is talking. You must give your undivided attention so that you completely understand what the customer is saying. This is a crucial step in order for the second step, "repeat", to be effective.

### **Tips to being a good listener include:**

- Hear non-verbal communication such as tone and pitch.
- Do not interrupt the customer while he/she is speaking.
- Take notes, only of what the customer is saying.

You can't interpret or repeat if you have not fully heard. If you have not fully heard, what you say to the customer will not address the issue, which the customer will pick up on, and likely become more upset. You can repeat, verbatim what the customer has said, but it may be better to paraphrase so they know that you were not only listening, but correctly interpreted their message.

The final step is to apologize. Apologizing is not saying that you in particular are wrong. It says that you are a representative of the company, and on behalf of the company, you are sorry that the customer is not happy in this situation.

## **AVOID PLACING BLAME**

When in a heated discussion with a customer, you may be tempted to tell the customer who's really to blame for the problem at hand, especially when it's not you. But, you must keep in mind that the customer doesn't care to blame an individual. They're looking to blame the company as a whole, and at that moment, YOU are the company. The ultimate goal is to offer a solution, so placing blame would be a waste of time and energy anyway. Keeping calm and your emotions under control can help you to look at the big picture and quickly resolve the issue.

## **SOLVE THE PROBLEM**

This is the bottom line of what the customer wants and what you want. There may be times when you can do this on your own. Other times, you may have to get co-workers or your supervisor involved. And yet there are times when the problem cannot be solved, but there must be a mutual understanding between yourself and the customer on this fact.

Once you have evaluated options and determined the most suitable solution to the problem, mentally or even physically write down how you are going to implement the solution. This may involve establishing who is

going to participate, when the implementation of the problem-solving will place, and how it will occur.

Once the implementation phase has occurred, it is important to follow-up with the customer to ensure satisfaction. Your goal should be to not only solve problems, but strengthen customer relationships.

## **PRACTICAL ILLUSTRATION**

Aiden received a call from a customer who immediately started yelling when he answered the call. Right before answering the call, Aiden had a disagreement with his manager, so he is already upset, and this call added fuel to the fire. Aiden was getting ready to yell back at the customer, when Charlotte, a team lead, who is sitting with him, listening to his calls, looks at him and with her hands, motions him to calm down. Aiden takes a deep breath, and then listens to the customer's complaint. He then follows the steps of repeating and apologizing. Although the issue is not his fault, and he knows whose fault it is, he thinks it best not to place blame on anyone. He knows he cannot solve the issue on his own, and briefly puts the customer on hold to discuss with Charlotte a plan of action.

*No customer walks into  
your business, gives you  
money and then says,  
“Dissatisfy me, please.”  
Aim for 100% customer  
satisfaction.*

BILL QUISENG



# GETTING THE NECESSARY INFORMATION

You want to be able to resolve the issue in as few steps as possible. To make this a reality, it is crucial to go into the conversation armed with these tools: a checklist of the questions you need answered, equipped with linear thinking, and being prepared to ask the appropriate open-ended and close-ended questions to get the job done.

### HAVE A CHECKLIST

When drafting a checklist of the questions you need answered in order to assist the customer, be sure the items can be easily understood by individuals of all education levels. In other words, don't use "big" words to sound knowledgeable, when a more simple word will do. Also, be sure you don't ask so many questions that you and the customer go around in circles for an extended amount of time, with no result.

### What are some of the questions you should ask?

- What is the problem?
- When did the problem occur?

- (If it's not obvious) What result would you like to see?

## **LINEAR THINKING**

Linear thinking involves step-by-step progression. A linear thinker expects one step to be addressed before moving on to the next step. This could be considered a logical way of thinking to ensure each piece of the puzzle properly fits into place so that no important detail is missed. Although not everyone is a natural born linear thinker, this skill can be very helpful in getting to the root of and resolving a customer service issue.

### **Common characteristics of linear thinkers:**

- Structure-based
- Traditional
- Like to implement solutions
- Stick to the facts

## **OPEN-ENDED QUESTIONS**

Open-ended questions elicit more than a yes/no response, they allow for discussion, which will enable you to gather further details about the situation at hand, which will better enable you to reach a conclusion. Open-ended questions can start with “*What*”, “*Why*”, and “*How*”, but sometimes they don't have to be a question at all, but rather a statement that produces more in-depth information. For example, “*Tell me about...*”

Some examples of open-ended questions:

- What can I help you with?
- Why would you like to return this product?
- How did the product operate when you turned it on?
- Tell me about your experience when trying to activate the product.

## **CLOSE-ENDED QUESTIONS**

While open-ended questions promote in-depth information gathering, close-ended questions want a simple yes/no response or response that gives specific information. Close-ended questions can start with “*What*”, “*Did*”, “*and Are*”. Just as open-ended questions don’t necessarily have to be questions, but statements, the same rings true for close-ended questions.

Some examples of close-ended questions include:

- What time did you notice this problem?
- Did the product turn on when you pressed the power button?
- Are you having problems operating the product?
- Please provide me with your account number.

## **PRACTICAL ILLUSTRATION**

Elijah is starting his shift at work. Because he is known for being a high performer, his manager has requested that Amelia, a new agent, sit-in

with him for some calls, to get some best practice tips. Elijah has created a checklist that he uses for each call in order to make sure he gets all of the information needed from the customer in one call. The questions written on the checklist progress in a linear fashion so that it is easy for him to ask the questions and easy for the customer to follow along and answer the questions. Amelia happened to glance at the checklist and noticed there is a section that says “*Open-ended*” and another that says “*Close-ended*”. She asked Elijah to take a few minutes to explain what those mean.

*What I Hear, I Forget.  
What I See, I Remember.  
What I Do, I Understand.*

CONFUCIUS



# PERFORMANCE EVALUATIONS

The only way to truly know if one is meeting the goals and standards set by the company is to evaluate their work. Each company has its metrics that each employee must adhere to. Understanding the metrics employees are expected to meet should not just be the duty of the manager. Agents should have a solid understanding of what is expected of them and what they should do to improve performance if they are not currently doing so.

## CONSISTENT SERVICE

Properly performing one's duties this week is great, but properly performing one's duties more often than not is better. We all have bad days, and it is unrealistic to expect a representative to live up to expectations every single day, but customers expect world-class service regardless of what's going on in an individual's personal life. Always remember that consistency is the key to customer satisfaction.

Sample scale for evaluating an agent's ability to provide customers with consistent, quality service:

4 = Exceeds expectations

3 = Meets expectations

2= Below expectations

1 = Unacceptable performance

If the agent's performance falls into the Unacceptable performance or Below expectations category, an improvement plan should be put into place.

## **ABANDONED CALLS**

Abandoned calls are those that are deserted by the customer before speaking to a representative. Some abandoned calls are unavoidable because the caller may have an emergency or something happens where the phone suddenly disconnects.

But, generally speaking, the abandoned call rate indicates whether or not an agent is being productive. Spending an abnormally great amount of time on one call could frustrate the customers waiting on hold in the queue, causing them to hang up. The longer the customer has to wait on hold, the more likely the call will be abandoned. The abandoned calls rate is calculated by dividing the number of abandoned calls by the total number of calls.

Employees who have a high abandoned calls rate should be made aware of this and given extra training so they are able to bring this number within the perimeter.

## **SPEED OF THE ANSWER**

The speed in which a call is answered and speed in which the proper answer is given the customer is equally important. Answering calls quickly can help reduce the abandoned calls rate, while promptly providing a customer with an answer to their problem can give the customer the satisfaction of knowing they were listened to and boost their confidence in the company.

Agents are evaluated on both, as this indicates how productive the agent is and how productive the company is as a whole.

## **LENGTH OF CALL**

Being assessed on the length of your calls can sometimes feel unfair. It is important for contact center agents to find the balance between spending enough time on the phone with the customer so that they don't feel rushed off and not spending so much time on the phone with one customer (especially when the issue has already been resolved) that other customers in the queue have to wait for a long time before having the chance to make contact with an agent. Remember; the longer a customer has to wait in the phone queue, the more likely they are to abandon the call.

This metric is one that is used to determine one's efficiency. Efficiency is important in helping to control costs as well promote customer satisfaction. Additionally, understanding the efficiency of the agent can assist the company in knowing the effectiveness of its training program,

and whether or not additional training is necessary, a coaching/mentoring program needs to be put in place, and even if current company policies need to be reviewed and revised.

## **PRACTICAL ILLUSTRATION**

Abigail is sitting down with Benjamin to discuss various metrics regarding his customer service performance. She explains that he has met the department's goals with his consistently high service and keeping a low abandoned calls rate. However, she noticed the amount of time it takes him to give the customer the answer needed is longer than what is allowed. Benjamin says the reason it takes him long to find the answer is because the team's manual is not in a logical order, making it difficult for him to figure out what section has the answer he needs.

*Training Is Everything.  
The Peach Was Once A  
Bitter Almond; Cauliflower  
Is Nothing But Cabbage  
With A College Education.*

MARK TWAIN



# TRAINING DOESN'T STOP

The old saying goes, “*Practice makes perfect*”. It’s important to remember that in everything one does, there is always room for improvement. How do you determine how good something is or how well someone is doing? Evaluate it regularly. Look at measurable statistics; get input from those who are involved in making the process run smoothly.

### EVALUATE PROGRESS

In addition to evaluating the progress of individual contributors, companies must evaluate the effectiveness of their training and coaching/mentoring programs, look to customers to ensure their satisfaction in their interactions with employees and the company as a whole. Also, companies must look at their own bottom line to make sure they are on track with meeting pre-set goals.

### GET FEEDBACK ON TRAINING

Once training curriculum has been developed and implemented, it is crucial to receive feedback from the trainees to determine if the training was truly successful. Some people may feel uncomfortable giving feedback, in fear of some type of repercussion if the feedback is not

favorable. This is why it may be more beneficial to allow trainees to do so in an anonymous manner. Even though this may be the case, there are a variety of anonymous / non-anonymous ways feedback can be obtained.

- Survey (written)
- Interview
- Focus group

If you plan to use methods such as an interview or focus group, be sure that the trainee is meeting with a third party, not the curriculum developer or trainer. This will help ensure honest feedback.

If allowing participants to express themselves via survey, consider asking some of these questions on the survey:

1. Was this training course useful to you?
2. Was the training course easy to follow?
3. What are specific things that you like about the training?
4. What are specific things that you dislike about the training?
5. Do you have any comments, complaints, or suggestions regarding this training?

## **KUDOS TO DESERVING EMPLOYEES**

Everyone wants to be praised for a job well done. In fact, this could be the difference between retaining or losing a good employee. Being told that one is doing a good job not only boosts the ego of the employee, but

it also lets them know that they are on track according to the standards of the company. There are many ways to give kudos. Not all of them have to have a monetary value, but the sentiment behind every method should be equally powerful.

### **What are some ways to give kudos to employees?**

- Verbally thank the employee during a department meeting.
- Bestow a personalized gift.
- Give employee extra time off.
- Provide the employee with a bonus or raise.

### **HAVE MONTHLY MEETINGS**

Informal discussions about team/company matters should take place on a regular basis. This will allow pressing issues to be dealt with right away, but it is also important to have monthly meetings on a more formal basis to talk about things that are going well, things that are going not so well, and any proposed changes. Being part of a team is not just everyone completing a task to reach the same goal; it is open lines of communication. Everyone must be in the loop in order for true success to be achieved.

These meetings are not just for leaders to talk, but also for contact center agents to engage in a two-way dialogue in order to have an opportunity to offer input that is useful to the smooth operation of the company.

## **PRACTICAL ILLUSTRATION**

James is the manager for the Blue Team of the contact center. He is conducting the monthly meeting with his team to discuss the things that are going well with the team, as well as areas of improvement, and some of the changes they are looking to make next quarter. The meeting is scheduled to last for one hour. James has already been talking for 45 minutes on the areas where the team requires improvement. Harper, an agent who has been with the company for three months, raises his hand to inquire about the successes the team has had, as well as discuss issues he's had on the phone that he didn't believe the training class adequately covered.

*One of the most  
sincere forms of respect is  
actually listening to what  
another has to say.*

BRYANT H. MCGILL

# CLOSING THOUGHTS

- **Albert Einstein:** I speak to everyone in the same way, whether he is the garbage man or the president of the university.
- **Bill Gates:** In business, the idea of measuring what you are doing, picking the measurements that count like customer satisfaction and performance... you thrive on that.
- **Eleanor Roosevelt:** To handle yourself, use your head. To handle others, use your heart.



**Rick Chisholm** made history when he single-handedly changed the professional Audio Visual industry by breaking all the rules and capitalised over 50% market share in Australia with very little capital, no partners, mergers or lenders and set up the first franchise operation of its kind in the world in the late 1990's and early 2000's.

As a 7x founder of companies and 30x businesses such as Innovest, AI Machine, Lightsounds, LSW, Light Emotion with revenue in excess of \$300 million and having employed more than 1,000 staff over the last 35 years. Rick is known as the Start-Up and SME Guru and is Author of a number of books including Business Success for Life. Unlike many mentors, he actually walks the talk and has a number of businesses under management in such areas as Automation, Events management, Importing, Distribution, Retailing and E-commerce.

His BIG passion is Business Education empowering Businesses Owners through knowledge and skills. Whilst Rick has experienced great success, he has also endured many failures. Rick has faced and overcome the exact same challenges you are facing now.



**Tala Chisholm** is an SME specialist who has owned and managed several small to medium sized businesses in the last 20 years, several of which were eventually sold. She has extensive experience in the fields of retail, franchising, licensing, dealerships, education, importing, distribution and consulting.

Her expertise lies in building and implementing customised cross-platform database and software solutions for businesses, automation, IT, web marketing, advertising, graphic design, business administration, process refinement and implementation. Her business experience ranges from bricks-and-mortar Giftware retailing to highly technical fields such as Security, CCTV, Entertainment Lighting and Audio sales, hire and installations as well as e-commerce.

Throughout her career she also trained and mentored Franchise business owners as well as internal division managers. Some areas of training included retail operations, management practices, business strategy, accounting, cash-flow, marketing, customer service and IT. She has also headed up the drafting of Operating Compliance Manuals for Franchise operations and implementation of all the elements involved.



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