

How to Open a Call

Instructions: Take a few minutes to read through your sheet. After all the members of your group have had a chance to read their topics, each person will take up to two minutes to “teach” their subject. The person in your group who has the longest hair will go first.

In this teaching sheet, we’ll look at the 2 simple things you need to do to open calls on a positive note and leave the customer with a great experience.

1. Use a friendly greeting

If Mission has a standard greeting, use that. I’m sure it’s perfect for your customers. If you don’t have a greeting in place, here’s a great way to start the call.

Say your company, or department name, tell the caller your name, and lastly, make an offer to assist the customer.

Here’s how that will sound:

“Mission Health Collections, this is Myra. How may I help you?”

It’s that simple.

2. Use a Lead-in

Once you give the customer your standard greeting, they will tell you what they need, or they’ll ask you a question. You need to “lead”-into the interaction, and not just jump into helping them.

Let’s say the customer says, *“My statement says I owe you \$299, but according to Cigna, I only need to pay \$64.”*

You could jump in and say, *“What’s the account number?”* That certainly gets right to the point, but it’s missing friendliness and connection.

So don’t just jump to the point. “Lead” into the interaction by saying something like, *“I’m happy to help with this. (that’s your lead-in) I can look this up for you using your account number.”*

This is so much friendlier just jumping in. **(continues on back)**

Good lead-in statements might be:

"I'm happy to help."

"Absolutely, I can do that for you!"

"Of course."

"Certainly, we can look into this."

"I'll do my best to help."

Open your calls with a friendly greeting and use a lead-in. When you do these things, you'll make a great first impression over the phone, and you'll lay the foundation for friendly interaction.

Yield to Callers

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Some of us are fast talkers. And as fast talkers, we’re sometimes at risk of over-talking other people or, interrupting them. Because this is something I struggle with - and then, catch myself - I know it’s not intentional. Still, cutting a customer off can come across as rude.

Sometimes we over-talk as we try to get our point across with a challenging customer. In these situations, interrupting can be seen as adversarial, and it will only make things harder for you, with your demanding customer.

In this teaching sheet, I’m going to show you how to yield to callers, so that you never come across as rude or, as adversarial. We’ll do this using 2 easy steps.

Two Steps to Yielding to Customers

1. Always allow customers to finish sentences

Even if you know exactly what the customer needs before they complete their sentence, still let them finish before you say anything. When you know within a second or two that the call will need to be transferred, you still need to allow your caller finish their statement, before making the transfer.

When you let your customers always finish what they’re trying to say to you, you make sure you don’t come off as rude, on in a hurry.

2. If you accidentally interrupt a caller, apologize.

You’re bound to mess up every now and then and interrupt a customer. I teach this stuff, and it still happens to me, all of the time. It’s okay. Just apologize. “I’m sorry... you go ahead.” The apology will make up for any little misstep you might have.

Yielding to callers makes customers feel heard, respected and understood. “Over-talking” and, interrupting leaves customers with an unpleasant feeling. So, let your customers finish their sentences, and if you accidentally interrupt, just apologize.

Speak in Complete Sentences

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This One Tip Will Instantly Make You Sound Friendlier On the Phone With Customers

One of the easiest ways to make your conversations with customers more conversational, and friendly, is to speak in complete sentences.

It is so common to hear interactions like this:

Last name? First name? Zip code?

It's undoubtedly efficient to ask customers questions in this manner. However, it's not the friendliest approach. In this article, I'll talk to you about instantly improving your ability to connect with customers and sound friendly by just speaking in complete sentences.

Yes, speaking in complete sentences will take a few more seconds, but it's so worth it, because of how the conversation will flow, and how you'll be perceived, by your customers.

When you have to ask your customer questions, I want you to do two things:

1. Always ask in complete sentences.
2. Moreover, use “please” and “thank you” whenever it makes sense.

It will sound something like this:

- “Can I please have your last name?”
- “Do you happen to have your claim number?”
- “Thank you. One last question for you.”
- “Can I please have the email address associated with your account?”
- When you speak in complete sentences, you sound friendlier, and the conversation will have a casual, natural flow. So, try to always speak in complete sentences with your customers.

Bridge Into Questioning

Instructions: *Take a few minutes to read through your sheet. After all the members of your group have had a chance to read their topics, each person will take up to two minutes to “teach” their subject. The person in your group who has the longest hair will go first.*

Questions are a double-edged sword for customer service professionals. You have to ask questions to get to the root of the problem, completely log issues, and in general, to help customers.

But, often **a series of questions can sound like an interview. If we aren't careful, back to back questions can come across as an interrogation.**

In this teaching sheet, I'll share with you two simple steps that protect you from sounding like you're interviewing or interrogating customers when you have to ask several questions.

Here are two simple steps:

1. Bridge Into Questioning

We can buffer the questions we have to ask by simply bridging to questioning. That is, make a statement to explain your series of questions “before” you launch the questions. Here are some good bridge statements:

- “To determine what happened, I will need to ask you some questions.”
- “Do you mind if I ask you some questions so we can figure out what has happened?”
- “So I can assist you, may I ask you a few questions?”

These bridge statements make questioning a little easier on your customer.

2. Be sure to use “please” and “thank you” in your questioning

For example:

- “May I have your zip code, please?”
- “Thanks. I have one final question for you.”

You have to ask questions. Improve your overall customer experience by bridging to questioning, and by using please and thank you. When you do, your questioning will not come across as an interview, or an interrogation and your customers will feel better about the interaction.

End with a Fond Farewell

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In a series of events, people remember the first thing, and the last thing, more than anything else. That’s why the way you open a call, and the way you end a call, is so meaningful.

Your call closing must do 2 things.

You need to “share any, next steps” with your customer; and then, you need to “end with a fond farewell.” In this article, you’ll learn how to assertively bring calls to closure, and end with a fond farewell.

1. Provide Next Steps

Start the call closure process by giving the customer any next steps.

Sharing the next steps lets the customer know the call is almost over, and this helps you to close the call quickly.

If you have next steps, just, share them. *“Alright, Jamie, we have updated your account and the adjustment will show on your next statement.”*

2. End with a Fond Farewell

After you’ve shared any next steps, you move right into the final closure. End with the same energy and friendliness you had when you started the call. **Nice farewells include:**

- *“Thanks so much for calling us today, Jordan.”*
- *“I enjoyed talking with you, Teresita. I hope you enjoy your afternoon.”*
- *“Well, if there's nothing else, all that's left is for me to wish you a great afternoon! Thank you for calling us today, Toneille.”*

Recap, and share any next steps, and finish with a fond farewell.