

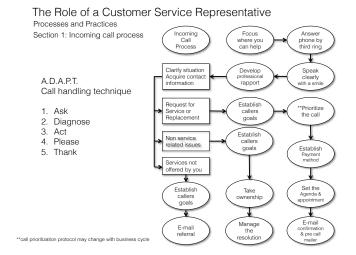


The Art of Customer Service

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The Role of a Customer Service Representative

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Processes and Practices

Section 1: Incoming call process

The A.D.A.P.T. Call Handle process is a flexible one that allows the CSR to *adapt* it to each customer call – hence the name. As we all know, not every call is the same, so a flexible, yet consistent approach is critical for the effective handling of each call.

A.D.A.P.T. is a sequential process that includes the following five steps:

- 1) Ask.
- 2) Diagnose.
- 3) Act.
- 4) Please.
- 5) Thank.

Before reviewing each step in detail, note that this process does not include a standard greeting. This omission is by design, because every call naturally begins with a greeting by the CSR. Let's take a look at how to effectively greet your customers.

	NOTES	
Greeting the Customer		
There are a wide variety of ways that companies		
greet incoming callers. It is recommended that		
every caller receive an enthusiastic, appreciative		
greeting that identifies the CSR, the company, and		
above all, communicates to the customer that they		
are welcome and appreciated. It should also		
include a statement expressing your		
willingness or ability to help. Your company		_
probably asks you to use a greeting that		
accomplishes most, if not all, of those objectives.		_
		_
Here are some common examples:		_
"Thank you for calling ABC Heating & Cooling, my		_
name is, how can I help you		_
today?"		_
"Thank you for calling ABC Heating & Cooling, this		_
is, what can I do for you today?"		_
"It's a great day at ABC Heating & Cooling, this is		_
, I can help you today."		
To review, regardless of the style of greeting your		_
company chooses, it should include:		_
 A statement of appreciation 		_
 Your company name 		_
 Your name 		_
 Your willingness or ability to help 		_
		_
		_
		_
		_
		_

Step 1 – Ask NOTES After opening the call with an effective and welcoming greeting, some callers enjoy a little small talk or exchanging pleasantries. This is acceptable as long as the exchange is brief and appropriate. Once that is complete, you are ready to begin the first step. The objective in the first step is to discover or uncover the caller's needs. Most callers know that there is a problem, but they may not know what they need to resolve it. For example, they may know that their air conditioner is not cooling, but they probably know very little about what may be causing the failure. It is important that you ask questions that might uncover the root cause of the problem. The best approach, as we learned in an earlier module, is to use probing questions. This type of question promotes more listening than speaking on the part of the CSR. If the CSR is listening and allowing the customer to speak, the cause of the problem will surface and the call will be dispatched more accurately. Examples of effective probing questions include: "Is it cooling at all?" "Is it blowing any air at all?" "Is the thermostat set correctly?" "Have you checked the breaker?" "Have you changed the filters recently?" Again, the objective is to gather information about the customer's needs. Asking questions, of course, is the best way to get the answers you need to arrive at a diagnosis – the next step.

Step 2 - Diagnose NOTES If you have done an effective job asking questions and gathering information in the first step, diagnosing the problem becomes a much easier task. First of all, keep in mind that your diagnosis is, by design, general in nature. Because of the technical nature and complexity of some HVAC systems, it is difficult, if not impossible, to determine the exact problem over the phone. Your objective is to narrow the problem down as much as possible and let the technician take over from there. It is *important* that you let the customer know this. Nothing will irritate a customer more than for you to tell them it is a "simple fix" and then to learn from the technician that the necessary repairs are extensive and costly. If that is the case, why diagnose? It is important for you to diagnose because an accurate diagnosis on your part results in the accurate dispatching of the call to a technician. By narrowing down the problem, you allow the technician to make sure he/she has the right tools, parts, and equipment to effectively service the call. In fact, it is a good idea to inform the caller of this approach. For example, you might say, "Mr. Johnson, based on what you've described, I believe that you may have a problem with your condenser. Let me get a technician out there to take a closer look. He/she will inspect the equipment and recommend a solution to you." Once you have arrived at a diagnosis, it is a good idea to confirm with the customer that you are on the right track. For example, "Mr. Johnson, it sounds like your thermostat may be

malfunctioning. Let's schedule a technician to	NOTES
come out and take a look. Does that sound like a	
good solution to you?" This extra step may not be	
necessary in every case, but it is a good practice	
when you want or need confirmation that you are	
going after the right problem, and more	
importantly, that the customer feels your actions	
will resolve their issue.	
Once your diagnosis is complete, you are ready to	
move to the next step.	
Step 3 – Act	
Your diagnosis is now complete and you are ready	
to take action. That action could possibly include a	
variety of things. For example, it could include one	
or more of the following:	
Booking the call.	
Entering a work order.	
Communicating with a dispatcher.	
Communicating with a technician.	
Communicating with a service manager.	
Try to complete this action while the customer is	
still on the line. Customers like to hear that their	
issue is being addressed. You may for example,	
schedule the call via a computer based system or	
application. In that case, you would check the next	
available opening and communicate that to the	
customer. This process will vary from company to	
company, but it is always a more positive	
experience for the customer if you are able to take	
the action immediately and then let the customer	
know what you have done.	
For example, you might say, "OK, Mr. Johnson, it	
looks like I can get a technician out to you this	
afternoon at 4:00pm. Will that work for you?" Then,	

"Great, I have Joe schedule to arrive at your home at 4:00; he'll take a look at that thermostat for you then. Is there anything else I can do for you?" If any follow-up action is required on your part, do so immediately after the call. For example, if you have to manually hand a work order to the dispatcher, do so as soon as possible. The last thing you want to do is break a promise to the customer. Take care of any of these follow-up activities before taking your next call. If a follow-up call is required or part of your normal operating procedure, make sure you do so within a reasonable time after rendering the services. For example, if the technician goes out at 4:00 and fixes the thermostat, calling back the next day to check on the customer is a great way to build increase customer satisfaction and loyalty. Once you have executed any actions that help resolve the customer's issue, you are ready to move to the next step.

Step 4 - Please

Your role in the resolution to the customer's issue is now complete. You are now ready to go to the next step – please or satisfy the customer. In this step, you are attempting to confirm the customer's full satisfaction and cement your relationship by confirming that you have taken care of all of their needs.

The first part of this step is to ask the customer if you have addressed their immediate problem fully. For example, you might say, "Mr. Johnson, once we have taken care of your problem with your air conditioner, do you think there are any other potential problems we need to look at? Or do you have any questions for me?" and then wait for a

response. Listen intently to make sure you have NOTES response. Listen intently to make sure you have resolved the issue fully and that you did not miss anything along the way. Once the customer confirms that you have done so effectively, ask is there is anything else they might need. For example, you could respond with, "Great, is there anything else I can do for you today?" This is a good opportunity to capture cues that may lead to additional sales. It may also present a good opportunity to introduce any promotions or new products your company may be attempting to bring to market, IAQ for example. You could introduce it by saying, "Mr. Johnson, did you know that our company can assess the quality of your indoor air for you? Is that something you might be interested in?" If the customer shows interest, lead the conversation towards an IAQ evaluation or other product if applicable. The bottom line is, listen intently to what the customer says – you never know when a sales opportunity will present itself! Once you are confident that the customer is fully satisfied, you are ready to move to the fifth and final step. Step 5 - Thank The fifth and final step in the A.D.A.P.T. call handle process is the *thank* step. This step begins with a warm and sincere "thank you." Let the customer know that you and your company really appreciate their business. When customers hear this, they cannot help but feel welcome and appreciated. Of course, this is a moot point if all of the actions you

promised are not delivered. But, it is critical that

you thank the customer for giving you the	NOTES
opportunity to serve them.	
You can express this gratitude in a variety of ways.	
For example, "Mr. Johnson, I really appreciate your	
calling us today. Our company appreciates the	
opportunity to serve you."	
The next part of this step is to summarize the call.	
This is a very nice and tidy way to begin the wrap	
up of the call. It is especially effective when there is	
more than one issue to cover. For example, let's	
say that you have set an appointment and for	
clarification of this point, that you have promised to	
send some literature related to IAQ. You could say	
to the customer, "OK Mr. Johnson, I have Joe	
scheduled to come to your home today at 4:00pm	
to look at your thermostat. I also am going ask Joe	
to leave that brochure I mentioned to you about	
IAQ. If you have any questions about that, feel free	
to call me back at your convenience."	
Summarizing the call reminds the customer of	
important elements of your conversation and gives	
your call a high degree of professionalism.	
Next, if you have not already done so (some	
companies like to do this at the front end of the	
call), ask the customer how they came to call you.	
This is an effective way to check your marketing	
activities. Your supervisor or manager may ask you	
to track this somehow. It is an important	
component for the effectiveness of your company's	
marketing and advertising programs.	
Once you have that information, take ownership of	
the customer's situation by personalizing the	
closing of the call and asking them to call you	
personally if they have any concerns. It is important	
that you do this however, without showing any	
concern that their issue will not be handled	

properly. For example, say, "Mr. Johnson, let me go ahead and give you my direct number in case you have any questions or need service in the future. Again, my name is ______, and my number here is (123) 456-7890." If your company has a particular procedure in place with regard to this, make sure you follow that procedure. Finally, ask the customer to share their experience with others. You have already secured their satisfaction in step 4, so you know they have had a positive experience so far. Ask them to tell their family, friends, neighbors, and co-workers about you and your company. Customer referrals are one of the most effective ways to grow your business.

The Role of a Customer Service Representative Processes and Practices Section 1: Incoming call process Benchmarks Answer phone before third ring Speak clearly, with a smile in Request for Service or Replacement your voice Develop professional rapport Establish callers goals Prioritize the call Establish Establish method of payment · Establish the agenda · Set the appointment · Email confirmation & pre call Establish

Incoming call Benchmarks

- Answer phone before third ring
- Speak clearly, with a smile in your voice
- Develop professional rapport
- Establish callers goals
- Prioritize the call
- · Establish method of payment
- Establish the agenda
- · Set the appointment
- Email confirmation & pre call mailer

Incoming call standards

- Maintain a "can do attitude"
- Focus on the things you "can do" to serve your customer
- Do not focus on the things you cant do to serve your customer.

		NOTES
Always		
 Answer 	the phone with-in the third ring.	
• Speak of	clearly with a "Smile in your voice".	
Always		
 Clarify y 	your callers situation	
 Affirm th 	hat you can help them	
 Acquire 	e contact information	
Always		
 Docume wants 	ent exactly what your customer	
 Clarify v 	what they want by repeating it to	
them.		
Prioritize each	call	
Establishing a	protocol simplifies prioritizing each	
incoming call.		
Example:		
Priority #1		
• Health	or Safety issues	
 Under v 	varranty or agreement	
 Equipm 	ent over 10	
Priority #2		
 Callers 	w/ equipment between 10-5	
Priority #3		
 Callers 	w/ equipment under 5	
		<u> </u>

	NOTES
Prioritize each call	
Sample questions to ask:	
 Have we serviced your equipment before? 	
 Are you a maintenance agreement customer? 	
How old is your system?	
 When was the last time it was serviced? 	
 Are there any health or safety issues? 	
Answers will allow you to	
Prioritize each call	
Keep your commitments	
Maximize opportunities	
Payment method	
 Explain fee for service 	
 Explain all methods of payments 	
 Ask which method would work best for them 	·
Instruct them to ask their Technician how	
they could qualify for a discount	
 Document their payment option 	
(example)	
"We charge an initial up front fee of \$\$ to	
Evaluate your system and document exactly	
what it will take to restore operation including	
the cost	
After you pick the option that makes the most	
sense for you, we'll finish the work.	
You can pay by check, credit card, part by	
check and credit card if you like, or we can	
finance it for you. What works best for you? We also offer up to 15% discounts on all	
services, be sure to ask our Technician how	
that program works, ok?"	
, ,	

NOTES Set the agenda Commit to a date and window of time for arrival. Explain how much time the average call usually takes. • Sell the person scheduled to perform the service Gain permission to send them an e mail confirmation along with a pre service checklist for them to review. Ask if there is anything else you can do for them at this time. (Example) "Tom is scheduled to be there between three and four o'clock. Service calls generally take between two and three hours, are you ok with that time-frame? Your going to like Tom. He's the best. If I could get your e mail address, I'll send you a service confirmation and a check list for you to go over and review with Tom when he arrives. Tom will call you when he is on his way. Is there anything I can to to help? Thanks for calling, we will see you this afternoon." Pre call e mail Thank your customer for calling Estimated time of arrival • Include a profile of the Technician assigned to their call Include a check list of the top 12 issues found with HVAC systems today, direct them to check anything in common with the list and review it with the Technician when

he/she arrives.

The goal of the check list is to

- Get the customer thinking about the things they want above just getting their system repaired, replaced or serviced.
- Prompt the customer and Technician to have a conversation about these other issues.
- Secure additional work.

The goal of the profile list is to

- Promote credibility
- · Establish common ground
- Allow the customer to draw some conclusion regarding the character of the technician and organization

The Role of a Customer Service Representative Processes and Practices Focus where you can help Answer phone by third ring Section 1: Incoming call process Non service inquiry standards Customer complaints Clarify situation Speak clearly with a smile Listen Empathize Apologize Establish callers goals Isolate Fix Follow-up Establish callers goals

Complaints are Opportunities

If you have had customer service training before or done any research on the subject, you have probably heard the idea that complaints are "opportunities in disguise." While this may be perceived as a business cliché´, it is a very true and important element that any business must embrace.

Why opportunities? The simple answer is that complaints are opportunities because they point out areas of weakness that might otherwise go unaddressed. Let's dig a little deeper to learn more about this concept.

	 _
•	

A significant amount of research has been	NOTES
conducted on the subject of customer satisfaction.	
The Technical Assistance Research Program	
(TARP), a research organization that was	
established in 1971 at Harvard University, has	
done the most notable of this research.	
According to TARP, 25% of customers are, at any	
given time upset enough with a business entity to	
stop doing business with them. Yet only 5% of	
these customers will ever voice their complaint.	
From a service company's point of view (like your	
company for example), you cannot fix what you do	
not know is broken.	
This research also uncovered a very surprising	
finding with regard to complaints and customer	
loyalty. The research revealed that loyalty is	
actually stronger among customers who had a	
complaint with a company and had the complaint	
resolved in a professional and timely manner than	
it is among customers who never had a complaint	
in the first place. TARP listed the following as key	
points in support of this finding:	
These customers stated that they know things can	
go wrong in any company.	
These customers felt a stronger loyalty to the	
company because the company	
proved that they cared about them and valued	
them as customers.	
These customers stated that they were more likely	
to purchase again.	

The TARP data shows that complaints are a	NOTES	
valuable component of customer relationships. It		
proves that quick and professional resolutions to		
complaints build stronger customer loyalty. As a		
result, we should always thank customers for		
bringing complaints to us. They allow us the		
opportunity to identify shortcomings, address and		
correct them, and in the long run, reduce or		
eliminate similar complaints in the future.		
Customer complaints		
• Listen		
 Empathize 		
 Apologize 		
 Isolate 		
• Fix		
• Follow-up		
·		
Listen		
These callers are typically emotional and often		
angry. First, listen carefully while allowing the caller		
to vent their feelings. In most cases, these callers		
just want to get things off their chests and want		
someone to hear them out. Here are some keys to		
accomplishing this effectively:		
Don't interrupt. Let the customer have their say.		
You will have an opportunity to respond later.		
Don't match their aggression. Never argue with a		
customer; that is an argument you will never win.		
Stay calm and eventually, the customer will mirror		
your demeanor.		
Don't question the customer. Not yet anyway.		
There may be a need to do that later, but		

initially, hear them out. You will know when they are done.	NOTES
Don't take things personally. Remember that complaining customers typically know you are not responsible, but they do see you as a representative of the company. Remove yourself personally from the equation, regardless of how difficult that may be at times.	
Empathize After allowing the customer to explain the situation, however difficult that may be, you should then focus on responding with empathy. Empathy was defined in an earlier module as "putting yourself in the customer's shoes." We also learned that empathetic statements tell the customer that you care. This is especially critical in complaint situations.	
With upset customers, these statements provide a cushion and lead the customer to believe that you understand and are willing to help. Use empathetic statements generously. The	
amount of statements and the degree of empathy you use depends primarily on how upset the customer is. In other words, the more upset and perhaps irate a customer is, the more empathy you must show.	
Examples of empathetic statements that you might use in complaint situations include the following: "I completely understand Mrs. Johnson, I would be upset too."	
"I know exactly what you mean sir and I can see why you feel the way you do." "I see what you're saying Mrs. Garcia and I can appreciate why you're upset."	

	NOTES
Above all, do not ignore or dismiss their opinions,	
feelings, and attitudes as trivial. That will only fuel	
their anger further and make matters much worse.	
Apologize	
Next, apologize for the situation. This step is often	
difficult for some people. The key thing to	
remember here is that your apology is on behalf of	
your company. You know (and so does the	
customer by the way) that you may have had	
absolutely nothing to do with the situation that has	
prompted the complaint. But, as a representative,	
and in this case, spokesperson, of the company, it	
is critical that you present the apology. This simple	
act can diffuse the caller's anger and immediately	
builds a bridge between the two of you. It could be	
the start towards a lasting relationship.	
Some possible apologies include the following:	
"I agree with you Mrs. Johnson; it should	
not have been handled that way. I am so	
sorry that it did and I am going to fix it for you."	
"I want to apologize for this situation sir	
and I assure you I can help you."	
"I am very sorry that wasn't done correctly.	
I'm going to do everything I can	
to take care of this for you."	
These statements are effective because they	
communicate a sincere apology and are followed	
by a positive statement that tells the caller that you	
are going to make things right.	

Isolate NOTES Next, isolate the problem. In a complaint situation, this is not always easy because of the emotions the customer brings to the table. However, if you have done a good job with the first three steps, you will be in a good position at this point to get to the root of the problem. One effective method is to use probing questions. Customers may find it difficult to pinpoint the true cause of the problem, especially with the emotions involved. You can help by asking the right questions. When you think you're close to identifying the problem, preface your comments with a statement that verifies what the customer has told you. For example, on a complaint about an invoice amount, you might say, "If I understand you correctly Mrs. Johnson, you're saying we charged you too much for _____, is that right?" If the answer is yes, you've successfully isolated the real problem and are ready to offer a solution. If they say no, they will likely immediately tell you what the actual problem is. Fix Once you've pinpointed the problem, you are ready to offer solutions. The concept of "one call resolution" depends on your ability and willingness to resolve the complaint without additional calls and, more importantly, without passing the customer onto someone else. CSRs must feel empowered to devise fitting solutions to customer complaints. For example, you may not be able to adjust the price past a certain point, but you can offer other solutions such as

10% off, waiving the diagnostic fee, or giving the

customer a free tune up or service agreement. A service agreement actually helps both the customer and your company. Be sure to discuss this with your manager and familiarize yourself with local procedures.

Help the customer in a way that other companies do not – a way that makes your company unique. For example, you could give restaurant coupons or gift certificates. Even a simple thank you card can go a long way towards repairing and maintaining a long relationship with an upset customer

Follow-Up

The final step in effectively handling a complaint call is the follow up. Successful CSRs know the importance of taking *ownership* of the situation, from start to finish. With any call, but particularly with complaints, you should adopt a "The buck stops here" mentality. That is, once you answer that call, the customer on the other end of the line is yours! You must then do everything in your power to make sure their situation is resolved. More often than not, your work towards a solution will involve other people in your organization. If someone else drops the ball, guess whom the customer will want to hold accountable? That's right – you! So, be sure the customer is satisfied throughout their experience with your company. If a problem may take some time to resolve, let the customer know what to expect, and let them know that you intend to stay on top of it through the end. One more important point about your follow up you must follow up both during and after the resolution to the complaint.

For example, if the solution calls for sending a technician back to the customer's home, the follow

up activity might be a phone call the day the technician is scheduled to arrive. You might call	NOTES
and say, for example, "Mrs. Johnson, I just	
wanted to follow up and remind you that	
our technician will be coming by this	
afternoon to resolve that problem with your	
furnace. Please call me if you have any	
questions."	
Then, it is a good idea to call after an activity you	
directed, in this example, after the technician has	
performed the work. This follow up call might	
include something like this: "I just wanted to	
touch base with you again Mrs. Johnson.	
Was our technician able to take care of	
everything for you?"	
Again, the follow up is critical to closing the loop on	
the complaint. Additionally, it makes a clear	
statement to the customer that you care and that	
your company will go to any length to assure	
customer satisfaction.	
Dealing with Irate Customers	
If you have ever worked in a customer service role,	
you already know that it is inevitable that you will	
receive calls from irate customers. These callers	
are different from those with complaints, because	
the emotion they bring is highly elevated.	
First and foremost, your approach should begin	
with the six-step strategy for resolving customer	
complaints from the last section. That process is a	

good core method that will guide you through the

call. But, because of the emotionally charged disposition of the customer, there are additional

special approaches that you can employ to effectively deal with these callers. They are:

Never blame the customer.

	NOTES
Avoid criticizing the customer's emotional state. Focus on saving the customer, not the sale.	
Let's look at each of these approaches in more detail.	
Never Blame the Customer	
At all costs, avoid placing any blame on the	
customer. The customer is already irate and on the	
defensive. Any comment that can in any way be	
interpreted as an accusation that the customer is at fault will only elevate the customer's emotions.	
Instead, focus on the problem.	
Another important element in this approach is	
avoiding "you" statements. No matter how	
diplomatically you phrase them, these phrases come across to the customer in a negative way.	
Examples of these include:	
"You should have"	
"You need to"	
"Why didn't you?"	
In a nutshell, attack the problem, never the customer.	
oudiomor.	
Avoid Criticizing the Customer's Emotional	
State	
As a rule, you should never criticize or otherwise	
downplay the customer's emotional state. Doing so will only raise their intensity even higher. You can	
remind the customer politely that you are trying to	
help, but lecturing irate customers about their	
behavior or personality will accomplish nothing.	
In the majority of cases involving irate customers,	
they have every reason to believe they have been wronged. Ignoring that will work against you. Avoid	
making any comments about the customer's	

feelings other than the empathetic statements we reviewed in the previous section. Avoid using words such as "over-reacting", "blowing this out of proportion", "not a big deal", etc. The fact is, these customers feels justified in feeling the way they do and belittling them will only make them more difficult to deal with.	NOTES
Focus on Saving the Customer, Not the Sale	
We just learned that a quick and professional	
resolution strengthens the loyalty of a customer	
with a complaint. Another key component to this is	
the approach of "saving" the customer for the long	
term, not just the short-term sale that is currently at	
hand. Another way of looking at this is that	
focusing on the current sale is like winning the	
battle and losing the war.	
As a consumer, how many times have you	
experienced something like this? You are at a	
restaurant and are dissatisfied with a meal. You	
ask the waiter to take it back and he refuses. The	
manager apologizes but insists that if you want a	
different meal, you will have to pay for it. This	
leaves you with two options: (1) Eat the meal you	
were served, or (2) Order another meal and pay for	
two. Either way, will you ever enter the doors of this	
restaurant again? Absolutely not!	
A customer-focused restaurant manager (or even	
an empowered waiter for that matter) would have	
gladly taken the first meal back no questions	
asked, replaced it with another of your choice, and	

then (this is where the loyalty is built) picked up the tab! That is customer service at its best. Would you return to this restaurant? Absolutely! On top of that

you will probably tell this story to your friends and colleagues and encourage them to dine there. Furthermore, the cost of attracting a new customer is more than 5 times the cost of keeping an existing one. It is far easier to sell additional services to satisfied current customers and to new customers who have heard positive comments by word of mouth than it is to customers who are not predisposed to your company in any way.

Call Escalation

- Always be in an empowered state of mind
- Always attempt to resolve the issue yourself before escalating.
- Never be afraid or embarrassed to escalate a call to a senior customer service representative or to a supervisor.
- · Never guess at an answer.
- Always stay on the telephone line and announce the customer when a transfer is made.
- Never drop a customer unannounced on another associate or supervisor.

With regard to customer service, empowerment is the elimination of a problem solving hierarchy. This allows solutions to come from anyone, anywhere and at any time. Empowerment is a state of mind. As a CSR, you not only have the authority, but also the responsibility to use your knowledge, skill, sound judgment and creativity to serve your customers effectively.

But, does empowerment mean that you should NOTES *never* escalate a call to someone else? It definitely does not. Despite the fact that CSRs handle a multitude of different calls and customers each day, there is always the possibility a situation will arise that you are unfamiliar with or that you will get a call from a customer who demands to speak to someone else. Let's examine the first scenario – an unfamiliar situation. It may be a new situation or it may be one that is highly technical in nature. Either way, the worse thing you can do is guess at the answer or otherwise misinform or misdiagnose the caller's issue. Accept the fact that you will not always know the answer to every situation and don't be afraid to say, "I don't know." The key is, you should always follow that up with, "...but I'll find out." When in these situations, however, you should always attempt to resolve the issue without escalating to another associate or to a supervisor. When you are confident that you have done everything you can, then by all means, reach out to someone for help. Your company may have escalation processes in place and you should follow those processes closely. Call Escalation "warm transfer" Ask the customer's permission to put them on hold. With the customer on hold, call your supervisor (or talk directly if nearby). Fully explain the situation and give the customer's name to your supervisor. Go back to the customer and introduce him to your supervisor.

Then release the call to your supervisor.

Services not offered by you	NOTES
 Network with other trades and in home service companies 	
 Develop an in home services referral list 	
Use the list to help customers connect with	
 reliable service providers Focus where you can help not where you 	
 Focus where you can help, not where you cant. 	
Section 2: Customer Follow Up	
Moments of Truth	
The phrase "moment of truth" was coined by Jan	
Carlzon of SAS Airlines.	
A moment of truth occurs whenever and wherever there's a customer	
contact, because that is the moment when the	
customer forms a perception of the organization	
and it's products or services.	
The challenge for any company is to manage these	
moments of truth so that the perceptions are	
positive. The Customer satisfaction call gives you the opportunity to recover mistakes and save	
customers	
Benchmarks	
Become familiar with the nature of each initial call	
Review the current status of each call prior	
to calling Discover your customers moment	
of truth regarding their experience with your Company	
Resolve unresolved issues	
 Influence positive moments of truth 	

Discover your customers moment of truth	NOTES
regarding their experience with your Company	
By performing a customer satisfaction call.	
GREETING	
Good (Morning/Afternoon) Mr./Mrs./Ms. This is	
(CSR name) calling on behalf of (company name).	
I'm calling to check on the (service/maintenance)	
we performed at your home on (date). We want to	
see if we reached our goal of 100% satisfaction.	
The only way we can serve you better is to ask how	
we are doing."	
QUESTIONS	
"Was our Customer Service Representative helpful	
in setting your appointment?	
Was the technician courteous?	
Did the technician clean up everything after	
finishing his work?	
Did the tech answer all of your questions or	
concerns?	
On a scale of zero to 10, where 10 means	
extremely likely and zero means not at all, how	
likely is it that you would recommend (company	
name) to a friend or colleague?	
If rating is a 9 or 10	
"Thank you for that response, we appreciate that	
rating."	
If rating is a 7 or 8	
"Thank you for that response. What would you say	
is the most important improvement we could make	
to get you to rate us closer to a 10?" (Listen and	
record response)	
If rating is 6 or below	
"What is the primary reason for the score you just	
gave?" (Listen and record response)	

If customer is unhappy "Would you like our management to contact you to get a better understanding of your disappointment and try to resolve the problem? (Listen, record response and follow-up)	NOTES
Section 3: Maintenance agreement Scheduling process	
Maintenance agreements are typically scheduled when your company needs the work. Generally speaking, during the slowest months of the year. An effective strategy to keep technicians in front of customers is to determine how many calls are necessary each day to keep the schedule at least 80% full. Scheduling calls and close proximity of each other is very important as well. How closely calls are scheduled will determine how profitable and efficient team will be. The workspace that you used to make outbound calls should be quiet and without distractions. Be sure to block out the appropriate amount of time for you to focus on making outbound calls to your maintenance agreement customers. You might want to try to make calls at different times each day to determine when the optimal time to make outbound calls would be in your area.	
Standards • Set the appointment • Establish an agenda	
 Email pre-service pack E mail/text/tweet 48 hr. reminder E mail/text/tweet 24 hr. reminder 	

Monitor call to final disposition

Set the Agenda	NOTES
 Commit to a date and window of time for 	
arrival.	
 Explain how much time the average call 	
usually takes.	
 Sell the person scheduled to perform the service 	
 Gain permission to send them an e mail 	
confirmation along with a pre service	
checklist for them to review.	
 Ask if there is anything else you can do for 	
them at this time.	
Pre call e mail	
 Thank your customer 	
 Estimated time of arrival 	
 Include a profile of the Technician assigned to their call 	
 Include a check list of the top 12 issues 	
found with HVAC systems today, direct them	
to check anything in common with the list	
and review it with the Technician when	
he/she arrives.	
 Monitor calls to final disposition 	
 Follow the follow up process 	
 Influence positive moments of truth 	
Standards	
No customer contact:	
 Leave a message Email, tweet, text 	
 Repeat process if no contact in 48 hrs. 	
 Repeat process if no contact in 72 	
 Email, tweet, text & mail service notice 	

Customers today communicate a lot of different	NOTES
ways. The more avenues to utilize in	
communicating to your agreement customers, the	
more effective you will be in scheduling the work.	
Section 4: Recommended scripts	
ANSWER TELEPHONE	
(Within two rings)	
"Thank you for calling ABC Heating & Cooling, my	
name is, how can I help you	
today?	
(Listen to the Customer's response and make note)	
If this is a request for a sales appointment, go	
directly to the Sales Appointment Script.	
Otherwise continue as follows.	
<u>SEARCH</u>	
"I'll be glad to take care of that for you. First, I	
need to get a little information. May I have your	
name and address please?"	
(Search for Customer by Name and / or Address	
on System)	
(If Necessary Search by Telephone Number)	
If Caller Is Not In System	
"Thank you for waiting (customer name). Let me	
get a bit more information so I can get you in our	
system."	
"Could you spell your name for me please?" (Key	
In)	
"and your address is?" (Spell to verify and Key In)	
"city, state and zip code?" (Key In)	
(Name of Customer) you said your phone number	
was? (Key In)	
May I get a work number? (Key In)	
Continue Confirming Ownership	
"Do you own the home or renting?" If asked why:	
"We want to be sure the owner is involved.	

Can we get the owner's name and phone number?	NOTES
If caller objects, on a demand service call: "In lieu	
of an approved credit application from your	
landlord, I'm authorized to take your credit card	
information as payment. What type of credit card	
will you be using? The number? Expiration date?	
And the name on the card?" (Key In)	
Continue - Type of System	
"What type of (heating/cooling) system do you	
have?" If it's a system company does not work on -	
"I'm sorry (prospect's name), but we do not	
specialize in that type of (repair/installation). I	
would be glad to recommend another company if	
you want"	
Continue - Age of Equipment	
"Do you know the approximate age of the	
equipment?" (Key In)	
Continue - Marketing	
"For marketing purposes, may I ask how you heard	
of us?" If Yellow Pages or Internet: "Along with the	
(Yellow Pages/Internet) was there anything else?"	
(Key In)	
Continue - Email Request	
"We would like to send you a confirmation of this	
call by email? May I get your email address?"	
(Key In)	
<u>Continue</u>	
"Thank you for that (customer name). You're now	
in our system. How can I help you today?"	
If Caller Is In System But With Past Due A/R	
"(Customer name) I see your account is past due	
on previous work with us. I can take care of that	
for you. Would you like to use a credit card for	
payment?	
"Thanks for taking the time to help me straighten	
that out."	

If Caller Is In System But With Past Due A/R	NOTES
"(Customer name) I see your account is past due	
on previous work with us. I can take care of that	
for you. Would you like to use a credit card for	
payment?	
"Thanks for taking the time to help me straighten	
that out."	
If Caller Is In System - Normal Response	
"Thank you for waiting (customer name). I see we	
do have you in our system. Is this for your property	
at (address)?"	
"How can I help you today?"	
Demand Service	
VERIFY SYSTEM - EXISTING CUSTOMER	
If records show multiple systems: "Our records	
show your home has multiple systems. Which one	
is giving you problems?" (Key In)	
"Our records show you have a (gas furnace, heat	
pump, etc.) is that correct?" (Key In as needed)	
EXISTING CUSTOMER WITH MAINTENANCE	
AGREEMENT	
"(Name of Customer), I see you have a	
Maintenance Agreement with us. As you know,	
this entitles you to a (fill in %), with no overtime	
charges (dictated by company policy) and priority	
service."	
EXISTING CUSTOMER COVERED BY WARRANTY	
OR EXTENDED WARRANTY	
"(Name of Customer), I see the equipment is	
covered by a warranty. This gives you (identify	
what is covered under warranty). I will be sure to	
notify your technician"	
(Create Ticket on System) "To be sure I've	
understood, I've recorded your problem as (repeat	
problem). Is this correct?(Key Problem Code)	

SCHEDULE APPOINTMENT - REGULAR "(Customer name) I have a technician available for	NOTES
you on (day and time). Will this work for you? (Key	
In Appointment Details)	
CALLER WITHOUT MAINTENANCE AGREEMENT	
(Name of Customer), did you know you can qualify	
for a (fill in %) discount on this service call through	
our Maintenance Agreement program? This	
program provides two precision tune-ups per year	
and guarantees you priority service.	
Ask our service technician, he/she can go over the	
Maintenance Program with you.	
CONFIRM PAYMENT	
"Will you be paying by check or credit card?" (Key	
In)	
EXPLAIN WHAT HAPPENS NEXT	
"Well (customer name) our dispatcher will call you	
to let you know when the technician is on his way	
on the (appointment date)."	
"When the technician arrives, he'll let you know	
what's wrong and will go over your options. The	
diagnostic fee for this is only (\$ amount) and the	
tech will give you the repair quote upfront."	
REINFORCE	
Reinforce the customer's decision to use the	
company "Just to let you know, we back up our	
service repairs with a (fill in) warranty. It's the best	
around and reflects our commitment to our	
customers."	
CONCLUDE	
"(Customer name) is there anything else I can do	
for you today?" Allow time for caller to answer. If	
not, we will see you on (date & time). Thank you	
for calling today. We appreciate your business. If	
you have any other questions, just phone us."	

When asked about hourly rate	NOTES
"One thing you'll be glad to know (customer's	
name), we do not charge by the hour. Instead we	
do a diagnostic analysis for only (\$).	
We'll go through your entire comfort system step-	
by-step to determine what's wrong and look for	
potential problems.	
The technician will also look for anything that might	
affect the efficiency of your system and could be	
costing you money.	
After the analysis the technician will review his	
findings with you and get your approval before any	
work is done. Does that sound OK?"	
Why don't I schedule a technician to stop by and	
see what the problem is? I can schedule an	
appointment for your convenience.	
When asked the cost to replace a specific	
part	
"We find each service situation is unique as to what	
caused the particular problem. Without actually	
seeing your equipment,	
it's meaningless to give you a price for replacing a	
part over the phone.	
Our technician will do a thorough diagnostic of	
your system for only (\$) and then will explain your	
options."	
"Why don't I schedule a technician to stop by and	
see what the problem is?	
I can schedule an appointment for your	
convenience.	

Demand Service troubleshooting HEATING	NOTES
"Is the thermostat in the HEAT position with temperature set above room temperature? If Not: "When you change the thermostat setting, does the unit begin heating?" If unit begins to heat: "That's great news. Looks like it won't be necessary to send out a technician" That's great news. Looks like it won't be necessary to send out a technician." "Well (customer name) looks like we need to schedule a technician out. I'll be happy to set that	
up for your."	
COLD WEATHER During extreme cold conditions, the heating unit may not be able to keep up with the demand. It rarely happens, but during extreme cold weather, the natural gas utility may not be able to keep up with the demand as well. This more so in Southern climates.	
REGISTERS "Is warm air coming from the registers?" "The closed registers are shutting off the supply of warm air. Why don't you see if this takes care of the problem. If not, give us another call and we'll schedule a technician to come out."	

<u>FILTER</u>	NOTES
"Do you know when the air filter was last changed?"	
"I would recommend changing the filter. A	
clogged filter could be shutting off the supply of	
warm air to the house. Why don't you see if this	
takes care of the problem. If not, give us another	
call and we'll schedule a technician to come out."	
SCHEDULE CALL	
"Well (customer name), looks like we need to	
schedule a technician out. I'll be happy to set that	
up for you." Move onto next phase of call to	
schedule	
Demand Service-troubleshooting COOLING	
THERMOSTAT	
"Have you checked the thermostat to make sure it's	
set fo COOL and set on a temperature lower than	
the room temperature?	
If Not:	
"When you changed the thermostat setting, did the	
unit come on and begin to cool?"	
If system begins to cool:	
"That's great news. Looks like it won't be	
necessary to send out a technician"	
INDOOR BLOWER	
If thermostat was set correctly, but there is still no	
cooling	
"Is the indoor blower running	
If the indoor blower is off	
"Have you checked the breaker going to the indoor	
unit or the electrical switch at unit?"	
If either the breaker or disconnect switch were off	
and the system begins to cool	

"That's great news. Looks like it won't be necessary to send out a technician."	NOTES
If both switches to the indoor unit are already on,	
check to see if outdoor fan is operating.	
OUTDOOR FAN	
"One last check, is the fan running on the outdoor	
unit?	
If the outdoor fan is not running	
"Have you checked the disconnect at the outdoor	
unit and the breaker at the electrical panel to make	
sure they're on?"	
If customer has not checked breaker	
"In case either is off, reset just once. If it trips	
again, leave it as is"	
If the breaker was off and the system begins to	
cool	
"That's great news. Looks like it won't be	
necessary to send out a technician."	
If the breaker was on or the breaker tripped	
"Well (customer name) looks like we need to	
schedule a technician out. It's best to turn the	
thermostat to the OFF position and wait for the	
service technician. Let's go ahead and schedule	
that call."	
Insufficient Cooling	
"There are a number of conditions that could be	
causing the problem. Is there ice on the refrigerant	
lines coming from the air conditioner outside?	,
If yes	,
"Sounds like you may have an ice build up at your	
indoor coil. Turn the thermostat to the OFF	
position; but leave the fan setting at ON so the	
blower continues to run. This helps thaw the unit	
so the technician can work on it immediately upon	

arrival.

Otherwise "Well (customers name) we need to get a	NOTES
technician out to check out your system. I'll be	
glad to take care of that for you. "	
grad to take dare of that for you.	
Water Dripping From Ceiling	
Is the indoor unit located close by the leak in the	
attic? Could you confirm if the water is dripping	
from the indoor unit?	
"Well (customer name) looks like we need to	
schedule a technician out. I'll be happy to set that	
up for you. Be sure to turn the thermostat to the	
OFF position after we are finished talking."	
DEMAND SERVICE CALLBACK	
"If the problem is a result of our workmanship or a	
defective part, there is no charge for the visit	
(customer name). The technician will be able to	
determine if it's the same problem.	
DELAY	
Our technician is taking a little longer to complete	
his current call than we expected and is running	
about (approximate delay) behind. We will let you	
know just as soon as the tech is on his way."	
OTHER RESPONSES	
"Our technicians are trained to finish each call the	
first time. Occasionally it takes longer than	
expected to complete a repair."	
"With fully stocked trucks, most jobs can be	
completed on the spot. Other companies may not	
be as well stocked as ours"	

<u>OVERTIME</u>	NOTES
"Our normal working hours are (insert as applies).	
Unfortunately, our time slots are filled out for today.	
However, we can schedule an after hours service	
call today at our overtime rate. Would you like me	
to schedule your call yet today, or wait until	
tomorrow?	
MAINTENANCE QUESTIONS	
The Need For Maintenance	
"Your (heating/cooling) system needs regular	
maintenance just like your car. Imagine never	
changing the oil in your car. A lack of maintenance	
of your (heating/.cooling) system causes problems	
as well.	
You don't want your (heating/cooling) system	
breaking down on that (cold winter/hot summer)	
day."	
Comparison to Other Check and	
Cleans in Market	
"Many companies offer Check and Cleans. We're	
different, we conduct a through precision tune-up	
and a professional cleaning. Our tune-up is like	
going to a doctor for a physical, but in this case for	
your (heating/cooling) system."	
your (neating/cooming) system.	
Safety Benefits for Gas Furnace	
•	
"A tune-up also protects your family by detecting	
conditions that could emit dangerous fumes from	
your furnace."	

Other Tune-Up Benefits	NOTES
"Routine maintenance helps	
Extend the life of your heating & cooling equipment	
Fix problems before they cause the inconvenience	
and expense of an emergency repair	
Lowers monthly utility bills by improving system	
efficiency	
Provide the maintenance required under your	
equipment warranty"	
Ask For The Appointment	
"Can I schedule a precision tune-up for you?" (Go	
to script on setting tune up appointment.	
to conference of the style comments.	
Customer follow up script	
GREETING	
Good (Morning/Afternoon) Mr./Mrs./Ms. This is	
(CSR name) calling on behalf of (company name).	
I'm calling to check on the (service/maintenance)	
we performed at your home on (date). We want to	
see if we reached our goal of 100% satisfaction.	
The only way we can serve you better is to ask how	
we are doing."	
QUESTIONS	
"Was our Customer Service Representative helpful	
in setting your appointment?	
Was the technician courteous?	
Did the technician clean up everything after	
finishing his work?	
Did the tech answer all of your questions or	
concerns?	
On a scale of zero to 10, where 10 means	
extremely likely and zero means not at all, how	
likely is it that you would recommend (company	
name) to a friend or colleague?	

If rating is a 9 or 10 "Thank you for that response, we appreciate that	NOTES
rating."	
If rating is a 7 or 8	
"Thank you for that response. What would you say	
is the most important improvement we could make	
to get you to rate us closer to a 10?" (Listen and	
record response)	
If rating is 6 or below	
"What is the primary reason for the score you just	
gave?" (Listen and record response)	
If customer is unhappy	
"Would you like our management to contact you to	
get a better understanding of your disappointment	
and try to resolve the problem? (Listen, record	
response and follow-up)	
IF CUSTOMER INVESTED IN	
MAINTENANCE AGREEMENT	
If Customer Purchased Agreement in Conjunction	
With Call: "I see that you invested in our Maintenance	
Agreement program. That's a sound investment,	
you'll be pleased with our continuing service. Do	
you have any questions about the Maintenance	
Agreement?"	
If Customer Already Had a Maintenance	
Agreement On A Service Call:	
"I see that you have one of our Maintenance	
Agreements and was able to save () on your	
recent service call. That's a sound investment on your part."	

IF NON MAINTENANCE AGREEMENT CUSTOMER	NOTES
"Did the technician mention our Maintenance	
Agreement program?" (Listen)	
If Yes	
"Do you have any further questions about the	
Maintenance Agreement program?" (Listen &	
answer questions)	
If No	
"Our Maintenance Agreements include Precision	
Tune-ups to help reduce your energy bills. And	
should you ever need a service call, you get a	
(%) discount. Would you like to know all the	
benefits so you have a choice?"	
If Yes	
"You get a precision tune-up and professional	
cleaning for your heating system for the winter and	
your (air conditioning/heat pump) system for the	
summer."	
"You don't have to remember to call to schedule	
these tune-up visits, we call you."	
"This consistent maintenance on your equipment:	
* Lengthens equipment life.	
*Avoids costly and unpleasant breakdowns	
*But if you should need a service call, you not only	
get the (%) discount on the repair, you also	
receive Priority Service over non-maintenance	
agreement customers.	
*Gives you and your family maximum safety"	
"Do you have any questions about these benefits?"	
(Listen & answer any questions)	
For Maintenance Call Follow-ups:	
"If you were to invest in our Maintenance	
Agreement today, the total investment would be	
(\$) and you would get all of these benefits	
including the two tune-ups and professional	
cleanings."	

For Service Call Follow-ups:

"If you join our Maintenance Agreement program, I can give you a credit of (\$...) as a discount on your service call, which reduces your investment of the maintenance agreement to only (\$...) today."

(Listen)

Continue....

"Would you like to go ahead and take advantage of it?"

Voice Quality

Successful communication depends largely on the effective use of your voice.

- Keep your voice smooth and comforting, but not weak.
- · Be controlling but not aggressive
- Watch your diction and enunciation

Rate of speech

The customer's pace of speech should dictate your pace

- Talking too fast makes a customer feel rushed
- Talking to slow can express a lack of confidence or a feeling of disinterest

Most people speak at a rate of 140 to 160 words per minute The passage on the next slide is 159 words long. If you speak at a moderate rate, It should take about one minute to read.

The goal is to complete the reading to as close to one minute as possible.

Practice this technique to better control your rate of speech.

Practice text: Rate of speech exercise	# of
	words
We often get so busy with the day-to-day tasks of our jobs that	15
there is little time to think about our jobs and how our jobs relate to	30
the overall success of the company. Sometimes, those of us who	41
spend most of our time at work talking with customers do not	53
consider our jobs to be very important. The fact is, anyone who is,	66
in regular contact with the customer has one of the most important	78
jobs in the organization. Companies with reputations for	86
outstanding customer service were built over time knowing that it	96
is the front-line associates that hold the key to the company's	108
success. They know that effective communication and	115
understanding of the customer's needs is the only way to	125
effectively serve and maintain a dynamic customer base.	133
Successful Customer Service Representatives know that every	140
contact with a customer is an opportunity to provide excellent	150
service.	151

NOTES

Volume	NOTES
 Speak into the phone as if the customer was seated in front of you Speaking too softly makes your words hard to hear and understand and creates the impression you are unsure of yourself. Speaking too loudly causes the customer to think you are too harsh. Of course you need to speak louder than normal if the a customer asks you to. 	
Tone	
 Your tone should be pleasant, natural, well modulated and confident Pleasant Voice - Answer the phone with a smile in your voice Natural Voice - Speak in a relaxed tone. Use straightforward language. Avoid terms that are too technical. Well Modulated Voice - Vary the pitch and intensity of your voice. An expressive voice captures the listener's interest and attention. Confident - Be professional and sure of yourself. 	
Voice evaluation exercise	
The evaluation worksheet below is used to evaluate the overall quality of a CSR's voice. It can be used to evaluate recordings of your phone conversations or with a study buddy.	

Voice evaluation exercise

Quality	✓	<u>Rate</u>	✓	<u>Volume</u>	~	<u>Tone</u>	√
Pleasant		Too Fast		Too Loud		Professional	
Natural		Moderate		Moderate		Confident	
Soothing		Too Slow		Too Soft		Well Modulated	
Comforting						Too Formal	
Annoying		8				Too Casual	
Too Nasal						Disinterested	
						Abrupt	
		0					10

Effective Listening	NOTES
Listening is much more than hearing.	
The goal of listening is understanding.	
Effective listening requires empathy.	
 Avoid prejudging the speaker 	
Don't jump to conclusions	
Be aware of "emotional deafness"	
Stay alert, we think 4 times faster than we speak Listen for content Listen for intentions Take notes	
Eliminate all possible distractions	
After a person stops speaking • pause before you speak	
Summarize what was just said, "If I understand correctly, you mean"	
Remember the customer's name	
Ask how it is spelled	
Write it down	
Use it several times	
Listening exercise	
The evaluation worksheet on the next page is used to evaluate the overall effectiveness of a CSR's listening skills. It can be used to evaluate recordings of your phone conversations or with a study buddy to improve listening skills.	

Tune out too soon	What to hear what the customer really says
Are distracted by bad grammar or speaking skills – attention is to form	Pay attention to content not form. Focus on message
Getting ready to talk when should be focused on content	Listen – get nuances and content to understand intent
Tend to listen for facts to refute or pounce on errors	Mature in listening – listen for main ideas
Try to take in ever thing and reply to every thing	Concentrate on main issues. Avoid sidetrack remarks and knows how to sort
Fake attention	Aware of 'fake tendency and control voice tone
Give up too soon. Listening becomes hard and they begin to tune out	Listen carefully and can sort
Distracted by emotional words and lack control over their emotions	Emotions do not govern their behavior
Are unaware of talking- listening being out of sync	Keep energy on listening techniques
Rarely practice listening	Practice listening skills

Eff	ective communication: Always		
•	Always show empathy and interest		
•	Answer the phone by the second ring		
•	Avoid putting callers on hold, but if you must:		
>	Ask caller's permission		
>	Wait for caller to grant permission		
>	Never leave on hold longer than a minute or two		
	-		
: N	lever		
•	Shout, whisper, use slang or swear		
•	Take the call when laughing or talking to		
	someone else		
•	Eat, drink or chew gum while answering the		
	phone		
•	Be rude or angry with a customer		
•	Interrupt a customer		
•	Tune out a long-winded caller		
•	Talk negatively or badly about your company,		
	associates or competition		
•	Talk about personal problems		
•	Promise something we can't deliver		
NC	DTES		

The A.D.A.P.T. Call Handle process is a flexible	
one that allows the CSR to adapt it to each	
customer call – hence the name. As we all know,	
not every call is the same, so a flexible, yet	
consistent approach is critical for the effective	
handling of each call.	
A.D.A.P.T. is a sequential process that includes the	
following five steps:	
1) Ask.	
2) Diagnose.	
3) Act.	
4) Please.	
5) Thank.	
Before reviewing each step in detail, note that this	
process does not include a standard greeting. This	
omission is by design, because every call naturally	
begins with a greeting by the CSR. Let's take a	
look at how to effectively greet your customers.	
Greating the Customer	
There are a wide veriety of ways that companies	
There are a wide variety of ways that companies	
greet incoming callers. It is recommended that	
every caller receive an enthusiastic, appreciative	
greeting that identifies the CSR, the company, and	
above all, communicates to the customer that they	
are welcome and appreciated. It should also	
include a statement expressing your willingness or	
ability to help. Your company probably asks you to	
use a greeting that accomplishes most, if not all, of	
those objectives. Here are some common	
examples:	
NOTES	

"Thank you for calling ABC Heating & Cooling, my	NOTES
name is, how can I help you	
today?"	
"Thank you for calling ABC Heating & Cooling, this	
is, what can I do for you today?"	
"It's a great day at ABC Heating & Cooling, this is	
, I can help you today."	
To review, regardless of the style of greeting your	
company chooses, it should include:	
A statement of appreciation ("Thank you for	
calling").	
Your company name ("ABC Heating &	
Cooling").	
Your name ("this is first name last name,").	
Your willingness or ability to help ("I can help you	
today.")	
Step 1 – Ask	
After opening the call with an effective and	
welcoming greeting, some callers enjoy a little	
small talk or exchanging pleasantries. This is	
acceptable as long as the exchange is brief and	
appropriate. Once that is complete, you are ready	
to begin the first step.	
The objective in the first step is to discover or	
uncover the caller's needs. Most callers know that	
there is a problem, but they may not know what	
they need to resolve it. For example, they may	
know that their air conditioner is not cooling, but	
they probably know very little about what may be	
causing the failure.	
It is important that you ask questions that might	
uncover the root cause of the problem. The best	
approach, as we learned in an earlier module, is to	
use probing questions. This type of question	
promotes more listening than speaking on the part	

of the CSR. If the CSR is listening and allowing the	NOTES
customer to speak, the cause of the problem will	
surface and the call will be dispatched more	
accurately.	
Examples of effective probing questions include:	
"Is it cooling at all?"	
"Is it blowing any air at all?"	
"Is the thermostat set correctly?"	
"Have you checked the breaker?"	
"Have you changed the filters recently?"	
Again, the objective is to gather information about	
the customer's needs. Asking questions, of course,	
is the best way to get the answers you need to	
arrive at a diagnosis – the next step.	
Step 2 – Diagnose	
If you have done an effective job asking questions	
and gathering information in the first step,	
diagnosing the problem becomes a much easier	
task.	
First of all, keep in mind that your diagnosis is, by	
design, general in nature. Because of the technical	
nature and complexity of some HVAC systems, it is	
difficult, if not impossible, to determine the exact	
problem over the phone. Your objective is to	
narrow the problem down as much as possible and	
let the technician take over from there. It is	
important that you let the customer know this.	
Nothing will irritate a customer more than for you to	,
tell them it is a "simple fix" and then to learn from	,
the technician that the necessary repairs are	
extensive and costly.	
If that is the case, why diagnose? It is important for	
you to diagnose because an accurate diagnosis on	
your part results in the accurate dispatching of the	
call to a technician. By narrowing down the	

problem, you allow the technician to make sure NOTES he/she has the right tools, parts, and equipment to effectively service the call. In fact, it is a good idea to inform the caller of this approach. For example, you might say, "Mr. Johnson, based on what you've described. I believe that you may have a problem with your condenser. Let me get a technician out there to take a closer look. He/she will inspect the equipment and recommend a solution to you." Once you have arrived at a diagnosis, it is a good idea to confirm with the customer that you are on the right track. For example, "Mr. Johnson, it sounds like your thermostat may be malfunctioning. Let's schedule a technician to come out and take a look. Does that sound like a good solution to you?" This extra step may not be necessary in every case, but it is a good practice when you want or need confirmation that you are going after the right problem, and more importantly, that the customer feels your actions will resolve their issue. Once your diagnosis is complete, you are ready to move to the next step. Step 3 – Act Your diagnosis is now complete and you are ready to take action. That action could possibly include a variety of things. For example, it could include one or more of the following: Booking the call. Entering a work order. Communicating with a dispatcher. Communicating with a technician. Communicating with a service manager.

Try to complete this action while the customer is NOTES still on the line. Customers like to hear that their issue is being addressed. You may for example, schedule the call via a computer based system or application. In that case, you would check the next available opening and communicate that to the customer. This process will vary from company to company, but it is always a more positive experience for the customer if you are able to take the action immediately and then let the customer know what you have done. For example, you might say, "OK, Mr. Johnson, it looks like I can get a technician out to you this afternoon at 4:00pm. Will that work for you?" Then, "Great, I have Joe schedule to arrive at your home at 4:00; he'll take a look at that thermostat for you then. Is there anything else I can do for you?" If any follow-up action is required on your part, do so immediately after the call. For example, if you have to manually hand a work order to the dispatcher, do so as soon as possible. The last thing you want to do is break a promise to the customer. Take care of any of these follow-up activities before taking your next call. If a follow-up call is required or part of your normal operating procedure, make sure you do so within a reasonable time after rendering the services. For example, if the technician goes out at 4:00 and

increase customer satisfaction and loyalty.

Once you have executed any actions that help resolve the customer's issue, you are ready to move to the next step.

fixes the thermostat, calling back the next day to check on the customer is a great way to build

Step 4 - Please NOTES Your role in the resolution to the customer's issue is now complete. You are now ready to go to the next step – please or satisfy the customer. In this step, you are attempting to confirm the customer's full satisfaction and cement your relationship by confirming that you have taken care of all of their needs. The first part of this step is to ask the customer if you have addressed their immediate problem fully. For example, you might say, "Mr. Johnson, once we have taken care of your problem with your air conditioner, do you think there are any other potential problems we need to look at? Or do you have any questions for me?" and then wait for a response. Listen intently to make sure you have resolved the issue fully and that you did not miss anything along the way. Once the customer confirms that you have done so effectively, ask is there is anything else they might need. For example, you could respond with, "Great, is there anything else I can do for you today?" This is a good opportunity to capture cues that may lead to additional sales. It may also present a good opportunity to introduce any promotions or new products your company may be attempting to bring to market, IAQ for example. You could introduce it by saying, "Mr. Johnson, did you know that our company can assess the quality of your indoor air for you? Is that something you might be interested in?" If the customer shows interest, lead the conversation towards an IAQ evaluation or other product if applicable. The bottom line is, listen intently to

what the customer says – you never know when a

sales opportunity will present itself!

Once you are confident that the customer is fully satisfied, you are ready to move to the fifth and final step.	NOTES
Step 5 – Thank The fifth and final step in the A.D.A.P.T. call handle process is the <i>thank</i> step. This step begins with a warm and sincere "thank you." Let the customer know that you and your company really appreciate	
their business. When customers hear this, they cannot help but feel welcome and appreciated. Of course, this is a moot point if all of the actions you promised are not delivered. But, it is critical that	
you thank the customer for giving you the opportunity to serve them.	
You can express this gratitude in a variety of ways. For example, "Mr. Johnson, I really appreciate your calling us today. Our company appreciates the	
opportunity to serve you." The next part of this step is to summarize the call.	
This is a very nice and tidy way to begin the wrap up of the call. It is especially effective when there is	
more than one issue to cover. For example, let's say that you have set an appointment and for	
clarification of this point, that you have promised to send some literature related to IAQ. You could say	
to the customer, "OK Mr. Johnson, I have Joe scheduled to come to your home today at 4:00pm to look at your thermostat. I also am going ask Joe	
to leave that brochure I mentioned to you about IAQ. If you have any questions about that, feel free	
to call me back at your convenience." Summarizing the call reminds the customer of	
important elements of your conversation and gives your call a high degree of professionalism.	

Next, if you have not already done so (some	NOTES
companies like to do this at the front end of the	
call), ask the customer how they came to call you.	
This is an effective way to check your marketing	
activities. Your supervisor or manager may ask you	
to track this somehow. It is an important	
component for the effectiveness of your company's	
marketing and advertising programs.	
Once you have that information, take ownership of	
the customer's situation by personalizing the	
closing of the call and asking them to call you	
personally if they have any concerns. It is important	
that you do this however, without showing any	
concern that their issue will not be handled	
properly. For example, say, "Mr. Johnson, let me	
go ahead and give you my direct number in case	
you have any questions or need service in the	
future. Again, my name is, and my	
number here is (123) 456-7890." If your company	
has a particular procedure in place with regard to	
this, make sure you follow that procedure.	
Finally, ask the customer to share their experience	
with others. You have already secured their	
satisfaction in step 4, so you know they have had a	
positive experience so far. Ask them to tell their	
family, friends, neighbors, and co-workers about	
you and your company. Customer referrals are one	
of the most effective ways to grow your business.	
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Section 2: Problem resolution practices Customer complaints Listen Empathize Apologize Isolate Fix Follow-up	NOTES
Complaints are Opportunities If you have had customer service training before or done any research on the subject, you have probably heard the idea that complaints are "opportunities in disguise." While this may be perceived as a business cliché´, it is a very true and important element that any business must embrace.	
Why opportunities? The simple answer is that complaints are opportunities because they point out areas of weakness that might otherwise go unaddressed. Let's dig a little deeper to learn more about this concept.	
A significant amount of research has been conducted on the subject of customer satisfaction. The Technical Assistance Research Program (TARP), a research organization that was established in 1971 at Harvard University, has done the most notable of this research.	
According to TARP, 25% of customers are, at any given time upset enough with a business entity to stop doing business with them. Yet only 5% of these customers will ever voice their complaint	

NOTES From a service company's point of view (like your company for example), you cannot fix what you do not know is broken. This research also uncovered a very surprising finding with regard to complaints and customer loyalty. The research revealed that loyalty is actually stronger among customers who had a complaint with a company and had the complaint resolved in a professional and timely manner than it is among customers who never had a complaint in the first place. TARP listed the following as key points in support of this finding: These customers stated that they know things can go wrong in any company. These customers felt a stronger loyalty to the company because the company proved that they cared about them and valued them as customers. These customers stated that they were more likely to purchase again. The TARP data shows that complaints are a valuable component of customer relationships. It proves that quick and professional resolutions to complaints build stronger customer loyalty. As a result, we should always thank customers for bringing complaints to us. They allow us the opportunity to identify shortcomings, address and correct them, and in the long run, reduce or eliminate similar complaints in the future.

Listen	NOTES
These callers are typically emotional and often	
angry. First, listen carefully while allowing the caller	
to vent their feelings. In most cases, these callers	
5	
just want to get things off their chests and want	
someone to hear them out. Here are some keys to	
accomplishing this effectively:	
Don't interrupt. Let the customer have their say.	
You will have an opportunity to respond later.	
Don't match their aggression. Never argue with a	
customer; that is an argument you will never win.	
Stay calm and eventually, the customer will mirror	
your demeanor.	
Don't question the customer. Not yet anyway.	
There may be a need to do that later, but initially,	
hear them out. You will know when they are done.	
Theat them out. You will know when they are done.	
Don't take things personally. Remember that	
complaining customers typically know you are not	
responsible, but they do see you as a	
representative of the company. Remove yourself	
personally from the equation, regardless of how	
difficult that may be at times.	
	

Empathize	NOTES
After allowing the customer to explain the situation,	
however difficult that may be, you should then	
focus on responding with empathy. Empathy was	
defined in an earlier module as "putting yourself in	
the customer's shoes." We also learned that	
empathetic statements tell the customer that you	
care. This is especially critical in complaint	
situations.	
olidations.	
With upset customers, these statements provide a	
cushion and lead the customer to believe that you	
understand and are willing to help.	
and ordina and are willing to help.	
Use empathetic statements generously. The	
amount of statements and the degree of empathy	
you use depends primarily on how upset the	
customer is. In other words, the more upset and	
perhaps irate a customer is, the more empathy you	
must show.	
must snow.	
Examples of empathetic statements that you might	
use in complaint situations include the following:	
"I completely understand Mrs. Johnson, I	
would be upset too."	
"I know exactly what you mean sir and I	
can see why you feel the way you do."	
"I see what you're saying Mrs. Garcia and I	
can appreciate why you're upset."	
can approciate my you're appoin	
Above all, do not ignore or dismiss their opinions,	
feelings, and attitudes as trivial. That will only fuel	
their anger further and make matters much worse.	

Apologize	NOTES
Next, apologize for the situation. This step is often	
difficult for some people. The key thing to	
remember here is that your apology is on behalf of	
your company. You know (and so does the	
customer by the way) that you may have had	
absolutely nothing to do with the situation that has	
prompted the complaint. But, as a representative,	
and in this case, spokesperson, of the company, it	
is critical that you present the apology. This simple	
act can diffuse the caller's anger and immediately	
builds a bridge between the two of you. It could be	
the start towards a lasting relationship.	
Some possible apologies include the following:	
"I agree with you Mrs. Johnson; it should	
not have been handled that way. I am so	
sorry that it did and I am going to fix it for	
you."	
"I want to apologize for this situation sir	
and I assure you I can help you."	
"I am very sorry that wasn't done correctly.	
I'm going to do everything I can	
to take care of this for you."	
These statements are effective because they	
These statements are effective because they	
communicate a sincere apology and are followed by a positive statement that tells the caller that you	
are going to make things right.	

Next, isolate the problem. In a complaint situation, this is not always easy because of the emotions the customer brings to the table. However, if you have done a good job with the first three steps, you will be in a good position at this point to get to the root of the problem.	NOTES
One effective method is to use probing questions. Customers may find it difficult to pinpoint the true cause of the problem, especially with the emotions involved. You can help by asking the right questions.	
When you think you're close to identifying the problem, preface your comments with a statement that verifies what the customer has told you. For example, on a complaint about an invoice amount, you might say, "If I understand you correctly Mrs. Johnson, you're saying we charged you too much for, is that right?" If the answer is yes, you've successfully isolated the real problem and are ready to offer a solution. If they say no, they will likely immediately tell you what the actual problem is.	
Fix Once you've pinpointed the problem, you are ready to offer solutions. The concept of "one call resolution" depends on your ability and willingness to resolve the complaint without additional calls and, more importantly, without passing the customer onto someone else.	

CSRs must feel empowered to devise fitting solutions to customer complaints. For example, you may not be able to adjust the price past a certain point, but you can offer other solutions such as 10% off, waiving the diagnostic fee, or giving the customer a free tune up or service agreement. A service agreement actually helps both the customer and your company. Be sure to discuss this with your manager and familiarize yourself with local procedures.

Help the customer in a way that other companies do not – a way that makes your company unique. For example, you could give restaurant coupons or gift certificates. Even a simple thank you card can go a long way towards repairing and maintaining a long relationship with an upset customer

Follow-Up

The final step in effectively handling a complaint call is the follow up. Successful CSRs know the importance of taking *ownership* of the situation, from start to finish. With any call, but particularly with complaints, you should adopt a "The buck stops here" mentality. That is, once you answer that call, the customer on the other end of the line is yours! You must then do everything in your power to make sure their situation is resolved. More often than not, your work towards a solution will involve other people in your organization. If someone else drops the ball, guess whom the customer will want to hold accountable? That's right – you! So, be sure the customer is satisfied throughout their experience with your company. If a problem may take some time to resolve, let the

NOTES

customer know what to expect, and let them know NOTES that you intend to stay on top of it through the end. One more important point about your follow up you must follow up both during and after the resolution to the complaint. For example, if the solution calls for sending a technician back to the customer's home, the follow up activity might be a phone call the day the technician is scheduled to arrive. You might call and say, for example, "Mrs. Johnson, I just wanted to follow up and remind you that our technician will be coming by this afternoon to resolve that problem with your furnace. Please call me if you have any questions." Then, it is a good idea to call after an activity you directed, in this example, after the technician has performed the work. This follow up call might include something like this: "I just wanted to touch base with you again Mrs. Johnson. Was our technician able to take care of everything for you?" Again, the follow up is critical to closing the loop on the complaint. Additionally, it makes a clear statement to the customer that you care and that your company will go to any length to assure customer satisfaction.

Never blame the customer Avoid criticizing the customers emotional state • Focus on saving the customer, not the sale. Dealing with Irate Customers If you have ever worked in a customer service role, you already know that it is inevitable that you will receive calls from irate customers. These callers are different from those with complaints, because the emotion they bring is highly elevated. First and foremost, your approach should begin with the six-step strategy for resolving customer complaints from the last section. That process is a good core method that will guide you through the call. But, because of the emotionally charged disposition of the customer, there are additional special approaches that you can employ to effectively deal with these callers. They are: Never blame the customer. Avoid criticizing the customer's emotional state. Focus on saving the customer, not the sale. Let's look at each of these approaches in more detail. Never Blame the Customer At all costs, avoid placing any blame on the customer. The customer is already irate and on the defensive. Any comment that can in any way be interpreted as an accusation that the customer is at fault will only elevate the customer's emotions. Instead, focus on the problem.

Irate customers

NOTES

Another important element in this approach is avoiding "you" statements. No matter how diplomatically you phrase them, these phrases come across to the customer in a negative way.	NOTES
Examples of these include: "You should have" "You need to" "Why didn't you?"	
In a nutshell, attack the problem, never the customer.	
Avoid Criticizing the Customer's Emotional State	
As a rule, you should never criticize or otherwise downplay the customer's emotional state. Doing so will only raise their intensity even higher.	
You can remind the customer politely that you are trying to help, but lecturing irate customers about their behavior or personality will accomplish nothing.	
In the majority of cases involving irate customers, they have every reason to believe they have been wronged. Ignoring that will work against you.	
Avoid making any comments about the customer's feelings other than the empathetic statements we reviewed in the previous section.	
Avoid using words such as "over-reacting", "blowing this out of proportion", "not a big deal", etc. The fact is, these customers feels justified in	

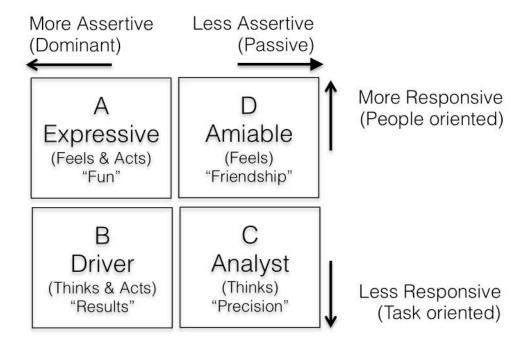
feeling the way they do and belittling them will only make them more difficult to deal with.	NOTES
Focus on Saving the Customer, Not the Sale We just learned that a quick and professional resolution strengthens the loyalty of a customer with a complaint. Another key component to this is the approach of "saving" the customer for the long term, not just the short-term sale that is currently at hand. Another way of looking at this is that focusing on the current sale is like winning the battle and losing the war.	
As a consumer, how many times have you experienced something like this? You are at a restaurant and are dissatisfied with a meal. You ask the waiter to take it back and he refuses. The manager apologizes but insists that if you want a different meal, you will have to pay for it. This leaves you with two options: (1) Eat the meal you were served, or (2) Order another meal and pay for two. Either way, will you ever enter the doors of this restaurant again? Absolutely not!	
A customer-focused restaurant manager (or even an empowered waiter for that matter) would have gladly taken the first meal back no questions asked, replaced it with another of your choice, and then (this is where the loyalty is built) picked up the tab! That is customer service at its best. Would you return to this restaurant? Absolutely! On top of that you will probably tell this story to your friends and colleagues and encourage them to dine there.	

Furthermore, the cost of attracting a new customer is more than 5 times the cost of keeping an existing one. It is far easier to sell additional services to satisfied current customers and to new customers who have heard positive comments by word of mouth than it is to customers who are not predisposed to your company in any way.	NOTES
Call EscalationAlways be in an empowered state of mind	
With regard to customer service, empowerment is the elimination of a problem solving hierarchy. This allows solutions to come from anyone, anywhere and at any time. Empowerment is a state of mind. As a CSR, you not only have the authority, but also the responsibility to use your knowledge, skill, sound judgment and creativity to serve your customers effectively.	
But, does empowerment mean that you should never escalate a call to someone else? It definitely does not.	
Despite the fact that CSRs handle a multitude of different calls and customers each day, there is always the possibility a situation will arise that you are unfamiliar with or that you will get a call from a customer who demands to speak to someone else. Let's examine the first scenario – an unfamiliar situation. It may be a new situation or it may be one that is highly technical in nature. Either way, the worse thing you can do is guess at the answer or otherwise misinform or misdiagnose the caller's	

issue. Accept the fact that you will not always know the answer to every situation and don't be afraid to say, "I don't know." The key is, you should always follow that up with, "but I'll find out."	NOTES
When in these situations, however, you should always attempt to resolve the issue without escalating to another associate or to a supervisor. When you are confident that you have done everything you can, then by all means, reach out to someone for help. Your company may have escalation processes in place and you should follow those processes closely.	
Call Escalation	
 Always be in an empowered state of mind Always attempt to resolve the issue yourself before escalating. 	
 Never be afraid or embarrassed to escalate a call to a senior customer service representative or to a supervisor. 	
Never guess at an answer.	
 Always stay on the telephone line and announce the customer when a transfer is made. 	
Never drop a customer unannounced on	
another associate or supervisor. Now, let's review the situation where a customer	
insists on speaking to a supervisor or manager, or	
maybe even the owner of the company. First, make	
every attempt to convince the customer that you	
are capable of helping them. Consider the	
suggested scripting in the following example:	

Customer: "Hello, I need to speak to your supervisor please."	NOTES
CSR: "I'll be glad to transfer you sir, but before I do, may I have your name and address please?"	
Customer: "I guess so. I'm George Jamison and I'm at 123 N. Main Street, New York, NY." CSR: "Thank you Mr. Jamison. May I ask what you're calling about?" Customer: "Yeah, I'm calling about my invoice. I think I've been overcharged. That's why I want to speak to your supervisor."	
CSR: "I can understand that Mr. Jamison, but I assure you I can help you with that. Would it be OK for me to try and if I can't resolve the charges for you, I'll then transfer you to my supervisor. Would that be OK?"	
If the customer responds that it is OK, then proceed with the call and resolve the issue. If not, make one more attempt to avoid the escalation.	
For example: Customer: "No, it's not OK. I want to speak to your supervisor now." CSR: "Mr. Jamison, please understand that I am familiar with your situation and have taken care of these issues before. If you'll just allow me the opportunity, I know I can help you."	

Now, if the customer responds that it is OK, proceed and resolve. If not, you have done what you can; go ahead and escalate the call.	NOTES
If and when you escalate calls, the best practice is to "warm transfer" the customer. A warm transfer involves the following steps:	
1) Ask the customer's permission to put them on hold. Say something like, "OK, Mr. Jamison, let me get my supervisor on the line. May I put you on hold for a second while I transfer you?"	
2) With the customer on hold, call your supervisor (or talk directly if nearby). Fully explain the situation and give the customer's name to your supervisor.	
3) Go back to the customer and introduce him to your supervisor. For example, you could say, "Mr. Jamison, I have Sally Jordan on the line. She is my supervisor and will help you from here."	
4) Then release the call to your supervisor.	



Section 3: Social styles

- Driver (task)
- Expressive (social)
- Analytical (fact)
- Amiable (support)

Driver

Are results-oriented and like to take the initiative.

They're

Seen as straightforward, quick to act.

- Often dominate
- Strong-willed
- Like to initiate & control
- Efficient
- Direct and to the point when dealing with Others

Expressive	NOTES
Are perceived as aggressive, inspiring &	
emotional. Are	
Comfortable taking the social initiative and rely on	
feelings to help make decisions.	
Excitable, fun loving & talkative	
Enthusiastic	
Like an audience and recognition Often futuristic greative & incriretional	
Often futuristic, creative & inspirational	
Analytical	
Are deliberate, constrained and logical. Carefully	
weigh all alternatives in making decisions. Tend to	
let others take the social initiative.	
Seek structure, certainty and evidence before	
making decisions.	
Appear quiet and unassuming, may show little	
emotion.	
Remain guarded until a relationship has been	
developed.	
Againle	
Amiable Quiet, unassuming and supportive. Enjoy personal	
contact and Shared responsibility. Build	
relationships and seek support from others before	
they make decisions.	
Place a high priority on getting along	
Appear quiet & cooperative	
Easy to get to know	
Minimize Interpersonal conflict whenever	
possible	
	Doos this person:
	Does this person:

•	Speak at the same rate and emphasis as me	NOTES
•	Prefer a pace similar to mine	
•	Focus more on facts or more on relationships	
•	Interrupt	
Αc	dapting to Drivers	
•	Be clear, specific and to the point	
•	Approach them in a straightforward and direct	
	way	
•	Provide alternatives and choices for them to	
	make their own decisions	
•	Present facts logically	
•	Ask specific questions	
AC	dapting to Expressive	
•	Allow time to relate and socialize	
•	Support their intentions	
•	Provide fewer details and suggest ways to	
	achieve their goals	
•	Provide ideas for implementing action	
•	Take enough time to discuss their ideas	
•	Avoid talking down	

Adapting to Analytical NOTES Stick to business Build your credibility by listing pros and cons to the suggestions you make Present specifics and do what you say Give them time to make a decision • Provide solid, tangible facts Minimize risk by emphasizing guarantees Avoid pushing too hard Adapting to Amiable Break the ice. Start with a personal comment Avoid rushing headlong into work • Show sincere interest in them as people and find common ground • Present your case softly, non-threateningly. Avoid being pushy • Ask questions to draw out their opinions • Emphasize guarantees that minimize their risks and maximize their benefits Watch carefully for areas of disagreement

Section 4: Stress & time management How well we deal with time- and stress-related issues is a reflection of our attitudes, beliefs, behaviors, and organizational skills. Setting priorities and keeping them straight is a challenge in this fast-paced world.	NOTES
When CSRs learn to manage their time and stress levels, they not only increase their productivity, but they also improve their overall attitude. Often times stress, poor attitudes, mood swings or complacent customer service is	
A result of a combination of poor time management, procrastination, poor organizational skills combined with an inability to identify or manage stress and or anger.	
Lets invest a few minutes and review some quick tips that can help identify and reduce the stress And put you and your colleagues in a better position to WOW your customers.	
To manage ourselves, we need to examine our work habits, our environments, and how we manage our time and organize our workload. Do we manage time or does it manage us?	
Plan and prioritize tasks Planning your day can help you accomplish more and feel more in control of your life.	
Write a to-do list, putting the most important tasks at the top. Keep a schedule of your daily activities to minimize conflicts and last-minute	

rushes. Remember that time-consuming, but relatively unimportant, tasks can consume a lot of a service professional's day. Prioritizing tasks will ensure that you spend your time and energy on those tasks that are truly important to you.	NOTES
Say"no"to nonessential tasks Consider your goals and schedule before agreeing to take on additional work. If possible, look at your to-do list and consider what can be delegated to someone else.	
Take the time you need. Doing work right the first time may take more time upfront, but doing a job too quickly will result in errors, and usually the time spent making corrections will end up taking more time overall.	
Limit distractions Block out time on your calendar for big projects. During that time, close your door and turn off your Smartphone, pager, and e-mail alert.	
Take care of yourself Get plenty of sleep, eat smart, exercise regularly, and take breaks. A healthy lifestyle can improve your focus and concentration, which will help improve your efficiency so that you can complete your work in less time. Too much stress can derail your attempts at getting organized. When you need a break or a short walk, take one.	

Do some quick stretches at your workstation. Take a day or two of vacation to rest and re-energize. Time Wasters Poor time management can interfere with everything you do.	NOTES
For CSRs, it limits the number of customers they are able to serve in a day.	
It also influences the time they have available and need to fully handle customer concerns and problems.	
Time management is a challenge for everyone every day, but it only improves (and becomes a habit) with concerted effort and regular practice.	
To be successful, CSRs must control how they spend the hours they have on the job.	
Developing effective organizational skills is one tool that can help add more time to our busy lives and ensure less stress on the job	
The organizational skills you apply toward planning each day provide a framework for your productivity. More important, they direct the demands on your attention and give you a sense of control.	
Prepare a monthly schedule. At the end of every month, make a schedule of events and significant deadlines for the next month.	

Use the schedule to highlight or mark off duties as they are accomplished. There is mental satisfaction in knowing a task is completed and acknowledging	NOTES
that you met an important goal.	
Prepare a file folder for each item on your schedule.	
Make notes on a particular project and immediately file them in the proper folder to save time and not have to search for them later. Frustration dissipates when you know that you have everything you need in one place when you need it.	
Rely on technology. Use your Smartphone, PDA, tablet PC, or computer as an electronic assistant. There are several good personal information management programs, such as Microsoft Outlook®, which allow you to track and schedule your activities, take notes, manage meetings, and so on.	
Organize your work area. Keep visible paperwork to a minimum, keeping only what is needed for the moment on your desk. Arrange your desk and paperwork so it flows in a logical sequence.	
For example, place important items first, left to right, in a semi circle on your desk. Disorganized personal space is a very big time waster. As you work, you may have to reorganize your work area every so often throughout the day. Doing this may give you a fulfilled feeling that things are getting finished.	

Manage your communications. If you need to focus on a project and not be interrupted, let your voicemail become your secretary.	NOTES
Return calls every two or three hours and keep a log of messages and their disposition so you do not have to rely on your memory to remember the details. You will instantly know if the task is completed or if there are still follow-up actions required.	
A good sense of organization makes CSRs more efficient. If one of your main sources of stress is the sheer number of things that need to be done, getting organized should help you feel more in control. Not being able to find important documents is a major time buster and stress inducer.	
Not all stress is bad. There is such a thing as positive stress, which people every so often need. Positive stress is a force that motivates and energizes you rather than makes you anxious and frustrated; therefore, you can channel its energy into productive results.	
For example, suppose you have been asked by your supervisor to train your peers in a customer service script that you developed for a new product. You might feel stress in the form of increased energy as you anticipate training others, but it is the positive kind because it propels you to do your best.	

In contrast, negative stress decreases productivity	
and comes from worrying about things you have no	
power to change.	
power to change.	
How do you get rid of stress?	
•Don't worry.	
By recognizing that sometimes you worry about	
things you can do nothing about, it's easier to	
channel your worry into something productive	
•Set goals.	
Focus your energy in a positive direction	
instead of feeling defeated by negative self-talk.	
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•Finish unfinished business.	
Make plans to complete an unfinished task or	
decide to drop it altogether, and stop causing	
yourself stress over it.	
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•Resolve conflicts. Apologize to a friend, family	
member, classmate, or co-worker that you've	
disagreed with. This is the kind of negative	
stress that can keep you up at night.	
Manage your time more effectively	
Learn how to set up boundaries	
NOTES	

Being a customer-focused employee can be	NOTES	
summed up in one word – attitude.		
The type of attitude that you put on display will, in		
large measure, determine the way people will react		
to you. The attitudes we choose create the climate		
we live in. This includes within our homes and at		
our workplace.		
It seems plausible then that we should want to		
surround ourselves in a healthy, positive		
environment.		
At one time or another we have all observed a less		
than positive person. This person may seem		
inaccessible, remote and at times even hostile.		
Have you ever noticed how you and others relate		
back to this person as an individual? In most cases		
we try to avoid this type of person. If that is not		
possible, we then try to spend as little time with		
them or we have very little to say to them.		
It is human nature to gravitate toward an		
environment where we do not feel threatened and		
one where we can feel free to cultivate a warm and		
friendly climate.		
Our customers are no different with regard to their		
needs and wishes. As CSRs, we must never		
display anything less than a positive attitude. We		
want all of our customers to feel comfortable with		
us.		
We want them to feel comfortable in telling us		
about any issue that they may havw. We also want		
them to feel comfortable enough to ask us		
questions, any question.		
Developing a customer-focused attitude		
Your attitude is critical to your success. To help		
establish and maintain a positive and customer-		
focused attitude, try the following:		

1) Start each day with thoughts about the positive	NOTES
aspects of your job.	
2) When negative events do occur - Take a deep	
breath and re-establish a positive attitude by	
making a conscious effort to focus on activities that	
allow you to regain your perspective.	
3) Whenever possible, avoid people and situations	
that are predictably negative.	
4) Share your attitude when things are going well.	
As stated earlier, everyone feels more comfortable	
around someone who displays a positive attitude.	
This will affect others and help them to find the	
right positive attitude.	
Sustaining a positive attitude takes a conscious	
effort and practice.	
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Customer service reps must perform periodic self-	
evaluations to assess effectiveness and identify	
areas that need improvement. When that	
assessment is made, take the initiative to	
make changes and pay attention not to slip into	
old habits	
ord riddito	
After assessing your own strengths and	
weaknesses, focus on understanding	
your customers better. Listen to them, pay	
attention. By becoming familiar with the various	
barriers to customer service, recognizing the	
power of perceptions, understanding expectations,	
and maintaining your own credibility and sense of	
values,	
You will be equipped	
To serve your customers well.	
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