



CMD PUBLISHING

About CMD Publishing

At CMD Publishing, we think it's fun to take training seriously. We like to make training products that make people think, maybe laugh a little, and think again about how and why they do what they do. We produce training videos, books and other media for corporations, government, and educational and nonprofit organizations.

“FRAME OF MIND” LEARNING

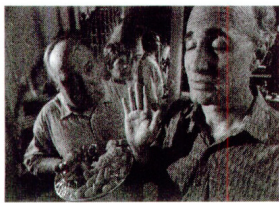
Our training media delivers what we call “frame of mind” learning. Our products are designed to give learners both a reason to take part in their training, and a way to remember it. To us, audio/visual media is best suited to just a few “high altitude” tasks. First, a video, CD-ROM or online program must offer learners a frame of mind for the training, a way to think about the lesson content. Second, it must persuade them that they should take part in the training—that what we are trying to teach is worth learning. Lastly, it must provide them with a way to remember what we are trying to teach—a mental framework to easily recall the training when they need it most.

OUR OFFICES IN THE PACIFIC NORTHWEST

Much of our business is conducted from our branch office in Seattle, Washington, but our corporate headquarters are located in Portland, Oregon, from where we research, design, write, produce, package and fulfill orders for our products. Our Portland office building is also home to our parent company—Creative Media Development, Inc.—an integrated marketing, communications and training development company. CMD Publishing is more than just a division of Creative Media Development, Inc.; we're really a natural outgrowth of their core competencies and expertise. Creative Media Development employs about 110 full-time experts in the fields of training development and instructional design, film and video design and production, multimedia and Internet development, meetings and events, and graphic design, also taking part in the conception, creation and management of CMD Publishing products. We invite you to visit the main CMD Web site at <http://www.cmdpdx.com>.

PRODUCING PARTNERSHIPS

We are always open to forming partnerships with organizations that may benefit from co-sponsoring or co-developing products we are producing or planning. Producing partners provide sponsorship in a variety of ways, from participating on our product development Advisory Panel in return for product or product discounts, to co-funding product development in return for broader product usage licenses. If you are interested in exploring partnership opportunities, please contact us.



Imagine being treated in person the way some people treat you on the phone.

ALSO FROM CMD PUBLISHING

Contact your distributor or CMD Publishing for information on this and other CMD Publishing training products.

Are you with me? *Common Courtesy On the Phone*

When we're with other people, we naturally tend to do what we can to understand one another, to ensure that we're communicating, to make certain we are making a connection. But when we interact with others on the phone, it's easy to lose touch with the basic rules of common courtesy. Wouldn't it be great if we all went out of our way— all the time— to treat each other on the phone the way we naturally know how to in person?

From making and taking calls, to transferring calls and putting people on hold, to taking and leaving messages, *Are you with me?* connects all the rules of telephone courtesy to a single, simple, easy-to-remember concept: *Treat the person on the other end of the line as though they were right there in the same room with you.*

(includes 22 minute video, Workbook & Leader's Guide, Pocket Reminder Card)



CMD PUBLISHING

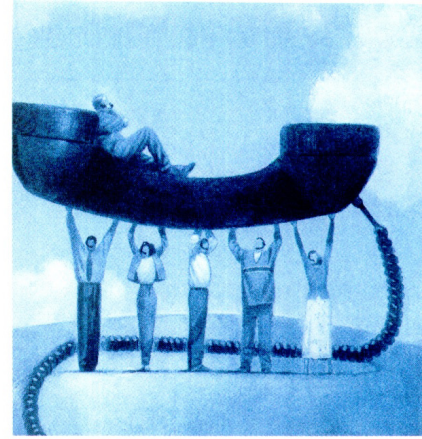
CMD Publishing
(503) 294-9979

<http://www.cmdpublishing.com>

Table of Contents

How to Use This Book	5
Who Should Use This Book?	5
Ways To Use This Book	5
Learning Objectives	6
Chapter 1: Why should you care?	7
How to C.A.R.E.	10
Action Steps	10
Chapter 2: Be Connected	11
What's In It For You	12
The Missed Connection: Unsuccessful Call	13
A Positive Connection: Successful Call	15
How to Be Connected to Your Customers	17
10 Second Connection Test	18
Your World	19
Be Connected Action Steps	22
Chapter 3: Be Attentive	23
What's In It For You	24
Missing the Point: Unsuccessful Call	25
Right To the Point: Successful Call	29
How to Be Attentive	31
Open Minded Questions	33
Your World	34
Be Attentive Action Steps	37

Chapter 4: Be Responsible	39
What's In It For You	40
Unfashionably Late: Unsuccessful Call	41
A Well Styled Solution: Successful Call	43
How to Be Responsible	45
The S.O.L.U.T.I.O.N. for Your Customers	47
Your World	49
Be Responsible Action Steps	52
Chapter 5: Be Enthusiastic	53
What's In It For You	54
Get It Off My Plate: Unsuccessful Call	55
Choosing to C.A.R.E., Again: Successful Call	57
How to Be Enthusiastic	59
Enthusiasm Generators	59
Your World	61
Be Enthusiastic Action Steps	62
Chapter 6: Be a Service Pro	63
What's In It For You	63
Stress test	64
Ten ways to manage the stress of your service job	66
Your World	68
Action Steps	69
Help For Facilitators and Trainers	70
How to use the workbook with a group	70
Session Agendas	70
Detailed Facilitation Plan	71
How to use the video with the workbook	74
How to adjust the length of your training	74
Facilitation Tips	75
Answer Guide For Question Types	76



How to Use This Book

WHO SHOULD USE THIS BOOK?

"It's Your Call" is designed to help people who deliver customer service on the phone. Some of the people who will benefit from this book are people who work in call centers, on technical support help desks, in the health care industry, and those who take orders or solve problems for customers on the phone.

People whose job it is to take calls and transfer them, take messages, and make calls to others may find key skills for their jobs missing from this training program. If you are looking for a training program on overall telephone skills, please contact your distributor or the publisher for information about the video and workbook titled, "Are you with me?: Common Courtesy On the Phone."

WAYS TO USE THIS BOOK

This workbook is part of a flexible learning program that is designed to help you become a pro at your telephone customer service job.

On Your Own: This workbook gives you a course on telephone customer service which you can complete on your own. You'll get the most out of your study if you discuss your work with another person such as your supervisor or a co-worker who is experienced at doing your job.

With the Video: Use the workbook with the "It's Your Call" video. Watch the video before you use the workbook, section-by-section while you use the workbook, and then again after you've finished the workbook. Tips for using the video for group training can be found on page 74.

In a Group: You'll get the extra benefit of others' ideas when you use the workbook for study in a group—with or without the video.

A Note to Trainers: A detailed Facilitator's Guide is provided, beginning on page 70. This thorough plan includes written session agendas, detailed lesson plans and tips for running group training sessions.

Enjoy your learning and good luck providing remarkable service to your customers.

LEARNING OBJECTIVES

In this book you'll learn to:

- Identify your own reasons for giving customers remarkable service.
- Make a personal connection with each caller.
- Make a caller's needs more important than anything else, for the moment.
- Ask callers questions that will give you valid information about their needs.
- Keep calls on track.
- Communicate clearly with customers about what you are doing for them.
- "Own" the call.
- Avoid taking tough calls personally.
- Identify options for helping customers.
- Identify ways to maintain your enthusiasm while working with customers.
- Use techniques for managing the stress of your customer service job.



Chapter 1: Why should you care?

While you may not discuss this question with your boss, it's reasonable to ask why you should put out the extra effort to make sure that every caller you talk to has a positive experience. After all, your job can be challenging. You have tough customers to deal with, and let's face it, we all have issues with our work from time to time that make our jobs less than perfect. Finally, your job may have repetitive elements that, at times, cause it to be less interesting than you would like. In the middle of dealing with all of this, why should you care? The simple answer is that it's better for you when you care.

IT'S BETTER FOR YOU WHEN YOU CARE

You're the winner when you care about the service your customers get. When you care, you get better responses from your customers, supervisors and co-workers. In the end, you get the most benefit. Here are reasons that experienced customer service reps tell us they care about the service they give:

- It feels good to help other people.
- It's the best route to salary increases and job advancement.
- My job is more fun when I care about the service I give.

What are your personal reasons for giving remarkable service?

SOME DAYS ARE HARDER THAN OTHERS

On some days, it may be tougher than others to care about the service you give. That's why it's helpful to have a list of "mental messages" to help you maintain your ability to care about each customer interaction, even if things aren't going as smoothly as you'd like.

HARD DAY SITUATION	MENTAL MESSAGE TO YOURSELF
You get a call from a customer who criticizes the solutions you offer and accuses you of not trying to help.	"I'm not going to let this person influence my mood. I'm not going to take on their anger or stress or anxiety. I want to enjoy the rest of my day."
You have to help a tough customer who is unhappy because of an on-going problem that you think your organization should try harder to fix.	"The problem is outside of my control. I'll focus on what I do have control over, which is helping the customer."
A mistake was made in another department that is causing a lot of dissatisfied customers to call. Your department didn't have anything to do with the problem, but now you have to talk to all of the unhappy customers.	"There's nothing I can do to change things now. If I spend my time being mad at the other department, I'm the one who will be most unhappy."

What are some of the discouraging situations you encounter in your job?

What mental messages can you use to help you continue to care about your customers?

HOW TO C.A.R.E.

Caring about your customers starts with a decision to be committed to helping your customers in a personable and effective way, every time. In this book, we use the acronym C.A.R.E. to help you remember the four key ways that great service reps give remarkable service on every call.

CHOOSE TO C.A.R.E.

CONNECTED

ATTENTIVE

RESPONSIBLE

ENTHUSIASTIC

ACTION STEPS

1. Remind yourself regularly about the personal benefits you get from serving customers well.
2. Use "mental messages" to help you care about the service you give, even when something tough has happened.



Chapter 2: Be Connected

NOBODY WANTS TO BE TREATED LIKE A NUMBER

You've probably had the experience of trying to get help on the phone from a customer service rep who treated you like a number. You likely didn't feel connected to the person or the organization, and you may not have gotten all the help you needed.

A critical part of helping customers is getting information. But there's something that comes before that, something that you already naturally know how to do when you greet someone in person: Be Connected. It's just a little harder on the phone because you and your customer are separated.

For some reason, we seem to think it's OK to treat people differently when we're separated than when we're physically with them. Yet, on the phone you can still make a connection with your customer, just like you do in person.

Think about how it goes when you greet a visitor in person. You may start by saying something like, "How's it going today?" You notice the person's facial expressions and other body language. These things help you get a sense for what's happening with the other person and to say something that fits the situation.

Think about being on the phone in the same way you think about visiting someone in person.

IN PERSON	ON THE PHONE
Notice facial expressions.	Notice tone of voice.
Have a conversation about what's happening in the person's life or job.	Pay attention to all of the person's story, not just the details of why the person called.

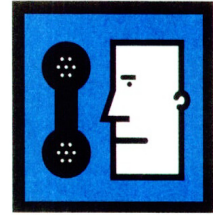
WHAT'S IN IT FOR YOU

In this chapter you will learn to:

- Decide to be friendly before you take each call.
- Treat your customer like you'd treat a visitor.
- Meet the customer where they are because the beginning of your call may not be the beginning of theirs.
- For the moment, make their needs more important than anything else.
- Listen for the meaning behind your customer's words.

GETTING THE JOB DONE ISN'T ENOUGH

It's likely there's a lot you need to do to be on top of your job. It's also likely that you need to work efficiently with customers so you can help as many as possible. Even if you're polite and get the job done with your customer, you may still leave the person feeling left out in the cold. Here's an example of what happens when a customer service rep just focuses on getting the job done politely. No doubt, at some point you've been on the customer side of a call like this.



THE MISSED CONNECTION: UNSUCCESSFUL CALL

Helen Wilson is excited about the new car she will be able to buy soon. She'll be able to afford it because she is about to pay off a loan. In fact, she hopes to be able to pay off her loan a month early so she can buy the new car in the next few weeks. Yesterday, she received her regular monthly statement from the bank where she has the loan. The statement is confusing to her and she can't seem to find the total amount she still owes on the loan.

Robert Commerce First Bank, this is Robert.

Helen I'm glad to hear a live voice. I sure had to push a lot of buttons on this phone to get to you. I just got my loan statement for the month. I don't know why, but I can't figure it out. You see, I'm hoping I have enough money to pay this loan off right away. That way, I can get a new car. I'm so excited about this. I've never owned a new car in my life.

Robert Can I get your loan number please?

Helen Yes, it's 27-4377124144.

Robert And can I get you to confirm the last four digits of your Social Security number?

Helen That's 4323.

Robert Thank you—and your name and address please?

Helen This is Helen Wilson. *(She gives him her address.)*

Robert How can I help you today?

Helen Well, as I said, I'm trying to figure out the balance on my loan. I just can't find it here.

Robert Our statements have a new layout as of this month. We sent a letter to all of our customers explaining the changes.

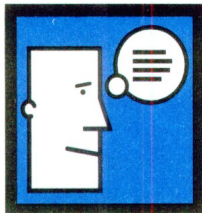
Helen I do seem to remember getting that letter.

Robert The letter explained where you could find everything.

Helen I never read that stuff.

Robert Your loan balance is \$374.05. It's the third line in the middle section of the statement. To pay the loan off you'll want to call for an exact loan payoff amount to make sure you pay off any interest that has been charged since this statement was sent. That number is on the back of your statement.

Helen Well, OK. Thank you.



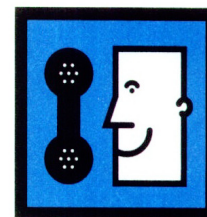
THINK ABOUT IT

How would you feel if you were the customer in this situation?

What were some of the things that Robert did that you would not have liked if you were his customer?

Now that you've looked at what happens when a customer service rep isn't connected, take a look at what happens when a CSR decides to Be Connected. You may notice that being connected doesn't take any longer than not being connected.

A POSITIVE CONNECTION: SUCCESSFUL CALL



Robert Commerce First Bank, this is Robert.

Helen I'm glad to hear a live voice. I sure had to push a lot of buttons on this phone to get to you. I just got my loan statement for the month. I don't know why, but I can't figure it out. You see, I'm hoping I have enough money to pay this loan off right away. That way, I can get a new car. I'm so excited about this. I've never owned a new car in my life.

Robert I'm sorry it was so hard to get to me. Our statement has a new layout as of this month and I'll be happy to help you figure it out. Can I get your loan number please?

Helen Yes, it's 27-4377124144.

Robert And can I get you to confirm the last four digits of your Social Security number?

Helen That's 4323.

Robert Thank you—and your name and address please?

Helen This is Helen Wilson. *(She gives him her address.)*

Robert So you could use a little help reading our new statement?

Helen Yes, you see, I ended up with a little extra money this month, and if I can pay off this loan right away, I can get a new car in the next few weeks.

Robert That sounds great! Let's see here ... Your loan balance is \$374.05. It's the third line in the middle section of the statement. To pay the loan off you'll want to call for an exact loan payoff amount to make sure you pay off any interest that has been charged since this statement was sent. That number is on the back of your statement. Can you find it?

Helen Yes, I see it here.

Robert By the way, we sent a letter to all of our customers explaining all of the changes. Do you need another copy of that letter?

Helen Actually, I wouldn't read that one either. I think I have everything I need. Thanks for your help.

HOW TO BE CONNECTED TO YOUR CUSTOMERS

It's a funny thing about customers. Within a few seconds they know if the person on the other end of the line is really connecting with them. They know if that person is going to do the best they can to meet their needs. That's why it's important to Be Connected from the very beginning of the call.

Decide to be friendly before you begin the call. You're the one who is in control of the way you sound. Some people recommend that you have a mirror near your phone and that you take a look before you answer each call. What you see is what the customer will hear.

Treat customers like you'd treat a visitor. When visitors come by, you'd want them to feel welcome. Let customers know with your tone of voice and with what you say that their calls are welcome.

Meet the caller where they are because the beginning of your call may not be the beginning of theirs. Meeting the customer where they are means respecting the fact that by the time they get to you they may have already made their way through a number of automated messages and waited in a queue for awhile. Your customer may have even made other phone calls before reaching you. Respect where they've come from.

For the moment, make their needs more important than anything else. There may be many other calls waiting or you may be experiencing problems in meeting the needs of your customers, but they don't need to hear about anything but how you intend to help them.

Listen for the meaning behind your customer's words. Does your customer seem confident and knowledgeable, or anxious and unsure? Does your customer seem to be in a hurry, or do you get a sense that they'd like you to slow down for them? Pay attention and respond accordingly.

WHAT WORKED

Take a closer look at the successful example to see how Robert quickly and easily helped Helen to feel comfortable and welcome by using each of these ways to Be Connected.

He decided to be friendly before taking the call which was demonstrated by his empathetic response to Helen's experience of navigating through the phone system.

He treated his customer like a visitor by making her feel comfortable about her confusion over the new layout of the loan statement.

He met his customer where she was by apologizing for any inconvenience she experienced in getting to him and by acknowledging her excitement about getting a new car.

He made her needs more important than anything else at the moment by giving her the answer to her question about her loan balance before offering more information about the bank's new loan statement.

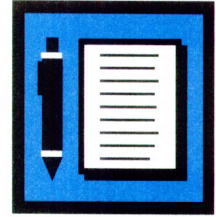
He listened for the meaning behind her words which prompted him to apologize for her frustration over the phone system and focused him on helping her with her goal of paying off her loan.

A QUICK CHECK-IN

Here's a quick test you can take shortly after the beginning of each call to decide if you're connected. If you can answer these questions, you're likely to Be Connected.

10 Second Connection Test

- What happened to my customer before now?*
- What is my customer's dominant emotion?*
- What is the first response my customer needs from me?*



YOUR WORLD

Here's your chance to apply what you've learned to your situation. Just follow these easy steps, and jot down your answers to each question in the space below.

1. **Pick a typical type of call that you handle.** This exercise will be most meaningful if you use a typical situation from your job. However, if nothing comes to mind or if you're new on your job, you may use the situation in the box.

What is the situation? (Answer only if you pick your own situation.) What type of person is calling? What has the person encountered before calling?

Alternative Situation

You work for the city water department. A concerned caller wants to know if the city will make an adjustment to his abnormally high water bill, which was caused by a broken pipe. The pipe leaked many gallons of water before he discovered it. The city will adjust his water bill after you send out an inspector to be sure the repair has been made properly. The adjustment will be based on his water bill during the same period last year. Your customer sounds worried. The bill is more than \$100 over the usual bill, and he doesn't have the extra money. He's also been on hold for about 10 minutes before reaching you.

2. Decide to be friendly.

How do you feel about taking this call?

3. Treat your customer like you'd treat a visitor.

How will you help this customer to feel welcome and comfortable?

4. Meet your customer where they are because the beginning of your call may not be the beginning of theirs.

Will you need to acknowledge what this caller has been through before reaching you? If so, what will you say?

5. For the moment, make their needs more important than anything else.

What are this person's needs?

6. Listen for the meaning behind the caller's words.

What meaning might be conveyed by this customer's tone of voice?



PRACTICE MAKES PERFECT

Practicing what you've learned is a good way to help you remember what you've learned. The best way is to practice out loud.

- We suggest you use the situation you've just described and do a quick role-play, with you playing yourself, and a partner playing the customer.
- Ask your role-play partner to read the situation you wrote about in advance, so your partner will know what role to play.
- You may wish to talk to your partner about how you'd like her or him to play the role—do you want the "customer" to be agreeable or difficult? Relaxed or rushed? Choose a manner for your role-play partner that is true to what you think would happen in real life.

CHOOSE TO C.A.R.E.

CONNECTED

ATENTIVE

RESPONSIBLE

ENTHUSIASTIC

ACTION STEPS

- Decide to be friendly before you take each call.
- Treat your customer like you'd treat a visitor.
- Meet your customers where they are because the beginning of your call may not be the beginning of theirs.
- For the moment, make your customer's needs more important than anything else.
- Listen for the meaning behind your customer's words.



Chapter 3: Be Attentive

IT'S YOUR CALL

It probably comes as no surprise that you need to listen with your full attention in order to Be Attentive to your customers. But it's what being truly attentive leads to that is crucial when it comes to delivering remarkable customer service. When you are being truly attentive you'll simply understand your customer's situation more clearly, and that's what makes it possible for you to guide the call.

You see, customers have reasons for calling. But some customers may have trouble explaining themselves. Others may enjoy the social aspect of the call and want to take too much time getting to the business at hand. Being attentive gives you the means to manage the communication aspects of the call. Remember, even when your customers call you, it's still your call. After all, you're the professional.

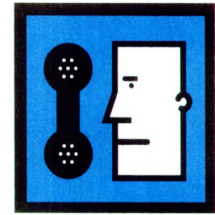
WHAT'S IN IT FOR YOU

In this chapter you'll learn to:

- Give your customer your full attention
- Ask questions with an open mind
- Make the choice to guide the call
- Be clear with your customer, and keep checking in to make sure they know what you're doing for them and that they agree to the next step

REAL COMMUNICATION NEEDS YOUR FULL ATTENTION

When you're talking to an attentive person, you may not stop to think how skilled a communicator the other person is, because conversations with them are likely to be clear and on track with what you need to discuss. You understand each other and your interaction is a success. More noticeable is when you're talking to a person who isn't attentive, because things just don't work out as well. Here's an example of how inattentive communication can lead to poor customer service.



MISSING THE POINT: UNSUCCESSFUL CALL

Roxanne is a call agent at a large medical facility that schedules all of its appointments through a call center. She has just received a call from a patient, Mr. Sanchez, whose back has been bothering him for several days. He has seen his doctor before about this problem. Roxanne listens poorly and doesn't hear that he is likely to be able to get a refill of his prescription, which means that she could transfer him to the prescription line. She also fails to guide the conversation.

Roxanne Chieftain Medical Center, this is Roxanne. May I have your patient number please?

Mr. Sanchez It's 43781.

Roxanne Thank you. To make sure our records are accurate, would you please give me your current address and home phone number?

Mr. Sanchez 4378 North Windward Street in Williamsburg. My phone number is 472-4871.

Roxanne Thank you, Mr. Sanchez. How can I help you today?

Mr. Sanchez Man, my back has gone out again. I don't know how many times I've been through this before and about the only thing that helps is these pills my doctor gives me. This sure isn't the time for my back to be giving me trouble. We're just getting a little spring weather and I'm ready to get back out on the golf course. You know, I haven't had my clubs out of the closet for at least four months now. The guys and I get together and play every Saturday, soon as the weather gets good. So I've got to get this back feeling better.

Roxanne So you'd like an appointment with your doctor?

Mr. Sanchez Well, OK, if that's what it takes to get my back feeling better. You know, if I don't play with the guys every week they'll find somebody else. We've had this group going for at least five years now, and my week just doesn't seem the same if I'm not out there with them on Saturday morning.

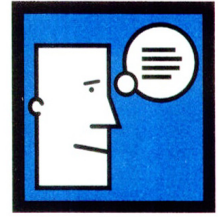
Roxanne Mr. Sanchez, your record shows that you see Dr. Gorman. He has appointments open next week on Wednesday morning at 8:30 and Thursday afternoon at 3:00. Would either of those times work for you?

Mr. Sanchez I don't know, I'd sure like to see him sooner.

Roxanne Unfortunately those are the first appointments he has available. I can put your name on his cancellation list.

Mr. Sanchez Well, OK. It sure seems like a lot of trouble to go through just to get my prescription refilled. In the past I've just been able to call and get a refill.

Roxanne Why didn't you say that in the first place? I can transfer you to the prescription line and they may be able to get a prescription refill for you today. I'll transfer you now. Thank you for calling, Mr. Sanchez.



THINK ABOUT IT

What would your reaction have been if you were Roxanne's customer in this situation?

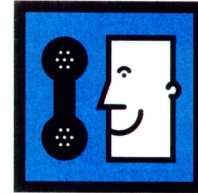
What were some of the things that Roxanne did that you would not have liked if you were Roxanne's customer?

UNFORTUNATELY, INATTENTIVE SERVICE KEEPS ON GIVING

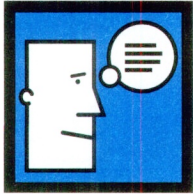
Failing to Be Attentive can have a “ripple effect” for your customer and your company long after the call is over. Roxanne made an appointment early in the call for Mr. Sanchez. After struggling through unclear communication, Mr. Sanchez helped Roxanne to understand that he only needed a new prescription. At the end of the call Roxanne wasn’t clear. Did he mind being put on hold? Did she cancel the appointment she made earlier for him? Did Mr. Sanchez show up for the appointment? If he did, was there an appointment for him? Is Mr. Sanchez mad at his health care provider right now? Is Mr. Sanchez’s doctor frustrated with the appointment scheduling call center?

Now that you’ve looked at what happens when a customer service rep isn’t attentive, take a look at what happens when a CSR decides to Be Attentive. Notice that being attentive can shorten the length of a call.

RIGHT TO THE POINT: SUCCESSFUL CALL



- Roxanne** Chieftain Medical Center, this is Roxanne. May I have your patient number please?
- Mr. Sanchez** It's 43781.
- Roxanne** Thank you. To make sure our records are accurate, what is your current address and home phone number?
- Mr. Sanchez** 4378 North Windward Street in Williamsburg. My phone number is 472-4871.
- Roxanne** Thank you, Mr. Sanchez. How can I help you today?
- Mr. Sanchez** Man, my back has gone out again. I don't know how many times I've been through this before and about the only thing that helps is these pills my doctor gives me. This sure isn't the time for my back to be giving me trouble ...We're just getting a little spring weather and I'm ready to get back out on the golf course ...
- Roxanne** Excuse me, Mr. Sanchez, it sounds like we need to get you some help. What can I do for you today?
- Mr. Sanchez** Well, I don't know. I know I've got to get some of these pills I take. I don't know how I got my prescription refilled last time.
- Roxanne** We have a prescription line. They should be able to help you get a refill. Will that work for you?
- Mr. Sanchez** Sure. That sounds like it will work. You know, I haven't had my clubs out of the closet for at least four months now. I've got ...
- Roxanne** Well, hopefully you can get right back to your game. May I put you on hold to transfer your call?
- Mr. Sanchez** Yes, that's OK with me.
- Roxanne** Thank you for calling. I'll put you on hold now.
-



THINK ABOUT IT

In this call, Roxanne did several things that helped the call work better. What were some of the things you would have appreciated if you were in this situation?

HOW TO BE ATTENTIVE

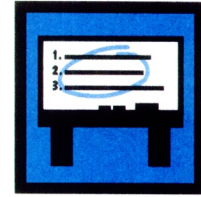
Being attentive can give both you and your customer a big payoff. Things will go faster and smoother and you're likely to make fewer mistakes when you're an attentive customer service rep.

Give your customer your full attention. Focus on the customer and shut out any distractions—both mental distractions and those in your environment.

Ask questions with an open mind. Be careful to avoid assuming what the answer will be. This is a common mistake that leads to errors and frustration. (See "Using Open Minded Questions" on page 33.)

Make the choice to guide the call. Guiding the call can be hard. Some customers want to chat, others are hard to understand, and some aren't sure what kind of help they need. But, both your time and your customer's time is valuable. Guiding the call doesn't mean rushing the customer. It just means being polite and personable without getting into long personal discussions. Sometime that means you need to be polite but firm to keep things on track.

Be clear with your customer. Keep checking in to make sure things are clear to both you and your customer. Also, keep checking in to make sure your customer understands exactly what's going on, what you're doing for her or him and that your customer agrees to the steps you're proposing to take.



WHAT WORKED

Take a look at the successful example to see how Roxanne quickly helped Mr. Sanchez when she chose to Be Attentive.

She gave her customer her full attention when she focused on understanding his need.

She asked questions with an open mind including, "How can I help you today?" and, "What can I do for you today?" By asking these questions she avoided incorrectly assuming that Mr. Sanchez needed an appointment with his doctor.

She made the choice to guide the call. Roxanne was a polite listener, but she was firm when she needed to keep the call on track by interrupting Mr. Sanchez's rambling conversation about golf. She also helped Mr. Sanchez tell her that he needed his prescription refilled.

She was clear with her customer and kept checking in to make sure he knew what she was doing for him and that he agreed to the next step. She made sure that Mr. Sanchez knew she was going to put him on hold and transfer his call and that it was OK with him for her to do it.

USING OPEN MINDED QUESTIONS

After you've been on your job for awhile, you'll probably have seen similar customer situations many times, so you may begin to anticipate how your customers will answer questions. This causes some customer service reps to ask "leading questions." Leading questions are questions that, in some way, lead the customer to an answer. When you lead a customer to an answer you may get wrong or incomplete information. Communication is clearer and more efficient when you ask "open minded" questions. These are questions that don't suggest an answer. Here's an example of each type of question.

Open minded question: When do you need this?

Leading question: You probably need this right away, don't you?

GIVE IT A TRY

Mark whether each of the questions below is an Open Minded or Leading question. Write an "O" for "Open Minded" or an "L" for "Leading."

1. What would be a good solution for you? _____
2. Will this work for you? _____
3. That's been going on for a long time, hasn't it? _____
4. Would you like to see our technician on Wednesday or Thursday (when there are other choices available)? _____
5. It's worse than before, isn't it? _____
6. What can I do for you today? _____
7. This isn't too big of a problem, is it? _____
8. You don't have any more information, do you? _____
9. How well did that work for you? _____
10. Has this happened before? _____

Check your answers with the answer guide on page 76.

YOUR WORLD

Here's your chance to apply what you've learned to your situation. Just follow these easy steps, and jot down your answers to each question in the space below.

1. **Pick a typical type of call that you handle.** This exercise will be most meaningful if you use a typical situation from your job. However, if nothing comes to mind or if you're new on your job, you may use the situation in the box.

What is the situation? (Answer only if you pick your own situation.) What type of person is calling?

Alternative Situation

You work for a mail order catalog company that sells home furnishings. A customer wishes to return a defective lamp that she ordered from your catalog. In fact, she has been sent this same item twice, and it has been defective both times. This customer is frustrated. Now she just wants a refund. She's unclear about your company's return procedures. The last time she returned the item she didn't include the return slip and therefore had to make an extra call to get her account credited for the return. You need to ask her to include the return slip when she ships the item back to your company.

2. Give the customer your full attention.

What will you do to help yourself listen with your full attention?

3. Ask questions with an open mind.

What kind of open minded questions might you ask this customer?

4. Make the choice to guide the call.

What steps might you need to take to guide this call?

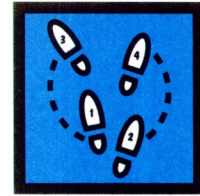
5. **Be clear with your customers** and keep checking in to make sure they know what you're doing for them and that they agree to the next step.

What are some of the things you might say to this customer to be clear?

PRACTICE MAKES PERFECT

Practicing what you've learned is a good way to help you remember what you've learned. The best way is to practice out loud.

- We suggest you use the situation you've just described and do a quick role-play, with you playing yourself, and a partner playing the customer.
- Ask your role-play partner to read the situation you wrote about in advance, so your partner will know what role to play.
- You may wish to talk to your partner about how you'd like her or him to play the role—do you want the "customer" to be agreeable or difficult? Relaxed or rushed? Choose a manner for your role-play partner that is true to what you think would happen in real life.



CHOOSE TO C.A.R.E.

CONNECTED

ATTENTIVE

RESPONSIBLE

ENTHUSIASTIC

ACTION STEPS

- Give your customer your full attention.
 - Ask questions with an open mind.
 - Make the choice to guide the call.
 - Be clear with your customers, and check in to make sure they know what you're doing for them and that they agree to the next step.
-



Chapter 4: Be Responsible

OWN THE CALL

The essence of your job is helping customers. That's why customer service pros make the choice to own every call, from beginning to end, no matter how challenging. Owning the call means taking full responsibility for making sure that your customers get help, whether they're calling to place an order, ask a question, solve a problem or even just complain.

REMEMBER TO BE ATTENTIVE

You can't take ownership of a call unless you fully understand it, and you can't understand a situation unless you give it your full attention. So a big part of being responsible has to do with following the lessons presented in Chapter 3 on being attentive. And being attentive and responsible is especially important when you're dealing with dissatisfied customers.

DISSATISFIED CUSTOMERS

As you probably already know, your job isn't all smooth sailing. No doubt, things can get a little rough in the course of a typical day because from time to time you'll probably have to deal with dissatisfied customers. And when you do, it's important to remember that it's still your call and always your job to take full responsibility, even though you may not be responsible for your customer's dissatisfaction. But the good news about dissatisfied customers is that they generally aren't upset with you, they're actually upset with the situation. The key to dealing with angry, frustrated and upset customers is to avoid taking things personally. When you remember not to take things personally, it's easier to help your dissatisfied customers.

WHAT'S IN IT FOR YOU

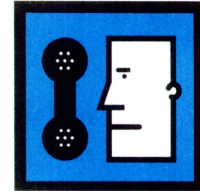
In this chapter you'll learn to:

- Own the call.
- Avoid taking things personally.
- Let dissatisfied customers vent.
- Apologize for the situation.
- Agree to next steps.
- Thank the caller.
- Do something extra to make up for the problem, whenever possible.

WHO'S RESPONSIBLE?

One reason it can be difficult to help dissatisfied customers is that they often call with problems that you didn't cause. It can be easy to feel that the people who caused the problem should also be the people to fix the problem. But since your job as a customer service rep is to care, you have to think of yourself as being the only person responsible for making sure every one of your customers gets all of the help they need. Let's take a look at what happens when a CSR decides that taking care of someone else's mistake is not their job.

UNFASHIONABLY LATE: UNSUCCESSFUL CALL



Amber is calling Fashion First Catalog on Tuesday evening to complain about a sweater she ordered. The wrong size was sent and she is concerned that the catalog company won't be able to ship the right size before she leaves for her ski trip on Saturday morning.

Tom Fashion First, this is Tom.

Amber I can't believe you guys did this! I ordered a sweater last week and you sent me the wrong size. You sent a small and I ordered a medium. I need it for a ski trip I'm taking. Do you know how much this messes up my packing plans? I had it all figured ...

Tom Let me see what I can do. What is your customer number please? It's on the back of your catalog or just above your name on the invoice that was sent with your sweater.

Amber I don't know. I mean this sweater goes just perfect with my ski jacket and with another pair of pants I'm taking. Oh, here's my customer number ... it's 1243560. How could you do this?

Tom Well, the warehouse makes mistakes sometimes.

(He enters her customer number in the computer, looks at her most recent order (which is for just one item) and then checks inventory for sizes.)

Tom I have your order right here in front of me. It looks like you ordered one red sweater and I'm sorry but it looks like the medium in that color isn't available.

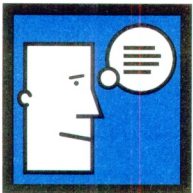
Amber But I've got to have it by the end of this week. My flight leaves on Saturday morning.

Tom Unfortunately there's not much I can do now. It looks like we should get a shipment within three weeks. I can put in your order and we'll ship it to you when our back order comes in.

Amber I can't believe you did this. I'm leaving in three days. I won't be able to find anything before I leave.

Tom Would you like to go ahead and order it?

Amber Oh, never mind. What good will it do me now?



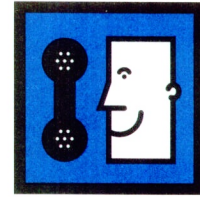
THINK ABOUT IT

What would your reaction have been if you were Tom's customer in this situation?

What were some of the things that Tom did that you would not have liked if you were his customer?

Now that you've looked at what happens when a customer service rep isn't responsible, take a look at what happens when a CSR decides to Be Responsible.

A WELL STYLED SOLUTION: SUCCESSFUL CALL



Tom Fashion First, this is Tom.

Amber I can't believe you guys did this! I ordered a sweater last week and you sent me the wrong size. You sent a small and I ordered a medium. I need it for a ski trip I'm taking. Do you know how much this messes up my packing plans? I had it all figured out, and now I don't know what I'm going to take on this trip. I mean this sweater goes just perfect with my ski jacket and with another pair of pants I'm taking.

Tom I can understand your frustration. Let me see what I can do. What is your customer number, please. It's on the back of your catalog or just above your name on the invoice we sent with your sweater.

Amber I don't know. I mean this sweater goes just perfect with my ski jacket and with another pair of pants I'm taking. Oh, here's my customer number ... it's 1243560. How could you do this?

Tom I'm sorry you didn't get the sweater you needed.

(He enters her customer number in the computer, looks at her most recent order (which is for just one item) and then checks inventory for sizes.)

Tom I have your order right here in front of me. It looks like you ordered one red sweater and I'm sorry but it looks like the medium in that color isn't available.

Amber But I've got to have it by the end of this week. My flight leaves on Saturday morning.

Tom We do have a couple of other styles in that same color. Do you want to take a look at those?

Amber Well, OK, but the sweater I ordered was just perfect.

Tom I'd really like to get you something that will work for your trip. Which catalog are you looking at?

Amber It's the fall catalog ... with the mom and two kids on the front.

Tom OK. We've got a sweater in red on page 37, and one on page 39. Will either of those work for you?

Amber Actually, I kind of like the one on page 39. Yeah, I'll get that.

Tom *(Checks stock for availability and size.)*

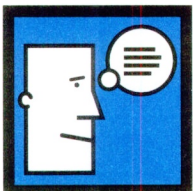
Yes, we have that in a medium ... and since this was our mistake we'll ship it to you at no charge and by second day air to make sure it gets there on time. How does that sound?

Amber Oh, what a relief.

Tom Well, we really do appreciate your business. Which credit card would you like to use?

Amber I'll put it on my Visa card. The number is 0000 1111 2222 3333.

Tom You should get this by Friday. Have a great trip!



THINK ABOUT IT

In this call, Tom did several things that helped the call work better. What were some of the things you would have appreciated if you were in this situation?

HOW TO BE RESPONSIBLE

You can make a positive difference when you choose to Be Responsible for making sure your customers get help. What's more, when you choose to Be Responsible, your customers will often be easier to help. You see, they're likely to sense your commitment to helping and be more confident they'll get what they need.

Own the call. Take full responsibility for making sure your customers get help, even when it's a tough call.

Don't take things personally. It may sound like your dissatisfied customers are mad at you, but they're not. They're mad about the situation.

Let dissatisfied customers vent without interrupting. In other words, let them talk it out. It helps lower their emotional level.

Apologize for the situation. Some people don't like to apologize for problems or mistakes that aren't their fault, and you don't have to. Instead, you can apologize for the situation. Say, "I'm sorry this didn't work out for you."

Agree to next steps. Be clear about what you're planning to do for your customers and make sure they agree.

Thank the caller. There's always a reason to thank your customer. At the very least, you can thank your customer for their comments.

Do something extra to make up for the problem, whenever possible. However, stay within the limits of the organization's policies and procedures. When you make up for an unsatisfactory situation your customers are likely to feel more satisfied.

WHAT WORKED

Take a look at the successful example to see how Tom helped Amber when he chose to Be Responsible.

He owned the call rather than just telling Amber to call back later when the medium-sized sweater might be in stock. What's more, he took responsibility for helping Amber when he suggested two alternative sweaters that she might order. He didn't simply stop trying to help Amber when he found out that the sweater she wanted was on back order.

He didn't take her unhappy comments personally.

He let her have her say without interrupting.

He apologized for the fact that Amber didn't get the sweater she needed.

He was clear about which sweater she finally ordered and how he would have it shipped to her.

He thanked her for her business.

He did something extra to make up for the problem when he offered to ship the sweater by second day air at no extra charge.

FINDING THE S.O.L.U.T.I.O.N. FOR YOUR CUSTOMERS

Being unable to grant your customer's request doesn't mean you can't help your customer. Consider all possible solutions, then offer the best options to your customer. When it's tough to think of options, use the letters in the word SOLUTION to help you brainstorm.

- | | |
|---|--|
| S – Say yes | "We can do that." |
| O – Offer ideas | "How about ..." |
| L – Later, but still "yes" | "We can get that to you by next Friday." |
| U – Understand your customers | "So this has happened to you twice now." |
| T – Teach customers to help themselves | "You can find quick answers on our Web site." |
| I – Include them in your search for solutions | "What would you suggest?" |
| O – Offer outside help | "I'll bet you could get help in a book called ..." |
| N – Neutral response: Just listen attentively. | "I see." |

Think of a customer request you are unable to grant and make brief notes about the request below. If you can't think of a request from one of your customers, use the Alternative Request on the following page.

What is the request? (Answer only if you pick your own customer request.)

Alternative Request

You are a customer service rep for a health insurance company. A new customer is calling to complain about a limitation on her policy. One of her doctors isn't on the list of doctors she's able to use. You know that no exceptions will be made to this limitation. You also know that you have another plan that allows her to see any physician she chooses. However, this plan is more expensive. She can apply to change to this plan if she wishes.

Use the letters in the word SOLUTION to help you brainstorm options to offer your customer.

S – Say yes. _____

O – Offer ideas. _____

L – Later, but still "yes." _____

U – Understand your customers. _____

T – Teach customers to help themselves. _____

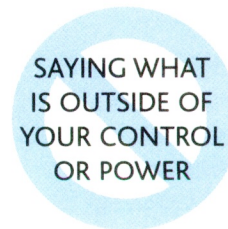
I – Include them in your search for solutions. _____

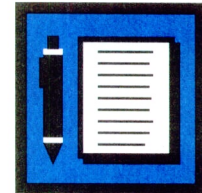
O – Offer outside help. _____

N – Neutral response: Just listen attentively. _____

DON'T MAKE THE SHIFT

Part of choosing to Be Responsible is avoiding the common bad habit of shifting responsibility or blame to other people or circumstances. Actively look for solutions and avoid:





YOUR WORLD

Here's your chance to apply what you've learned to your situation. Just follow these easy steps, and jot down your answers to each question in the space below.

1. **Pick a typical type of call that you handle** where your customer is at least somewhat dissatisfied. This exercise will be most meaningful if you use a typical situation from your job. However, if nothing comes to mind or if you're new on your job, you may use the situation in the box.

What is the situation? (Answer only if you pick your own situation.) What type of person is calling?

Alternative Situation

You work for a telephone company. An upset caller wants an adjustment to his bill. There are \$43 in long distance phone calls that he is sure he didn't make. He's also upset because he waited on hold for about five minutes, then just when the customer service rep picked up the phone, he was cut off. Therefore, he has waited on hold twice before reaching you. He's unhappy and wants to vent. You have a simple solution. You can check to see if the calls in question appear on previous bills. If not, you can give him "first time forgiveness" credit for those calls. After checking his previous bills, you find that you are able to make the adjustment he is requesting. However, you've only done this once before and would like help, but your supervisor is on the phone.

2. Own the call.

What are some of the ways you will "own the call"?

3. Don't take it personally. Let dissatisfied customers have their say without interrupting. Apologize for the situation.

How will you apologize for the situation?

4. Agree to next steps.

What next steps will you suggest?

5. Thank the caller.

How will you thank the caller?

6. Do something extra to make up for the problem, whenever possible.

Is there something extra you can do for your customer? If so, what is it?



PRACTICE MAKES PERFECT

Practicing what you've learned is a good way to help you remember what you've learned. The best way is to practice out loud.

- We suggest you use the situation you've just described and do a quick role-play, with you playing yourself, and a partner playing the customer.
- Ask your role-play partner to read the situation you wrote about in advance, so your partner will know what role to play.
- You may wish to talk to your partner about how you'd like her or him to play the role—do you want the "customer" to be agreeable or difficult? Relaxed or rushed? Choose a manner for your role-play partner that is true to what you think would happen in real life.

CHOOSE TO C.A.R.E.

CONNECTED

ATTENTIVE

RESPONSIBLE

ENTHUSIASTIC

ACTION STEPS

- Own the call.
- Don't take it personally.
- Let dissatisfied customers vent.
- Apologize for the situation.
- Agree to next steps.
- Thank the caller.
- Do something extra to make up for the problem, whenever possible.



Chapter 5: Be Enthusiastic

If you're like most customer service reps, you help quite a few people every day. Because each customer deserves to be treated as if he or she was your only customer, it's important to choose to Be Enthusiastic with every customer on every call, every hour you're on the phone. The fact is, when you fail to Be Enthusiastic, calls that might have been easy can end up being more work than they needed to be.

Don't misunderstand; being enthusiastic doesn't mean being a cheerleader all day long; it simply means doing all you can to give all your customers the remarkable service they expect and deserve.



WHAT'S IN IT FOR YOU

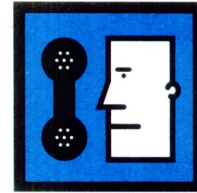
In this chapter you'll learn to:

- Constantly check your attitude.
- Treat every customer as if he or she were your only customer.

WHEN THE GOING GETS TOUGH ...

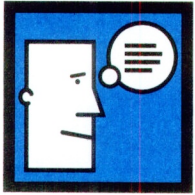
You probably already know that there are at least a hundred things that can get in the way of starting your next call with the right attitude. But don't let things like the number of calls you take or the fact that some of them may have been tough to handle stop you from doing your job well. Here's what can happen when a CSR lets the pressures of the job get in the way.

GET IT OFF MY PLATE: UNSUCCESSFUL CALL



Rebecca Eisman answers calls on a help desk, providing software and hardware technical support to her company's various departments and subsidiaries. Rebecca's lunch break starts in 10 minutes. She's already handled two tough calls today and would like to leave now. She knows she's not supposed to leave early, so she begrudgingly takes another call.

- Rebecca** Help desk, this is Rebecca Eisman. How can I help you?
- Jamal** This is Jamal Johnson in data processing. I don't know what's wrong here, but I can't seem to log on to my computer today. I don't have time to waste on this.
- Rebecca** *(Thinking to herself: Why can't people fix these easy problems themselves?)* This is probably a basic log-on problem. Did you try logging on a second time to be sure you did it correctly?
- Jamal** Yes, but that didn't work.
- Rebecca** Then what you need to do is log off and log on again. If that doesn't work, you need to shut off your computer and try again. I'm sure that will work for you. If you have any more problems give us a call.
- Jamal** *(Thinking to himself: Why can't she just stay on the line until I get this fixed?)* I don't know much about computers, and I've already been on hold for 10 minutes waiting to get to you, so I don't want to have to call back.
- Rebecca** Well, this works about 99 percent of the time, so I'm certain this will work for you. Call again anytime if you run into any more trouble, OK? *(Thinking to herself: Why can't he just take my word for it?)*
- Jamal** Wait! Hold on a second ... that did work! Thanks for your help. *(Thinking to himself: I'm glad I can get back onto my computer, but it sure would be nice if they were a little more friendly over there.)*
- Rebecca** No problem. *(Thinking to herself: At least that didn't take too long!)*
-



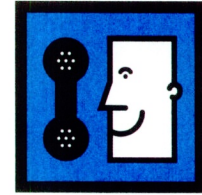
THINK ABOUT IT

What would your reaction have been if you were Rebecca's customer in this situation?

What were some of the things that Rebecca did that you would not have liked if you were her customer?

Now that you've looked at what happens when a customer service rep isn't enthusiastic, take a look at what happens when a CSR decides to Be Enthusiastic.

CHOOSING TO C.A.R.E., AGAIN: SUCCESSFUL CALL



Before taking the call, Rebecca checks her attitude. She realizes she's in a bad mood. Then she reminds herself of the efforts she and her co-workers put into meeting the needs of their customers and decides it's important to take another call and to do it with a helpful attitude.

Rebecca Help desk, this is Rebecca Eisman. How can I help you?

Jamal This is Jamal Johnson in data processing. I don't know what's wrong here, but I can't seem to log on to my computer today. I don't have time to waste on this.

Rebecca I'll bet I can help. This is probably a simple log-on problem. Did you try logging on a second time to be sure you did it correctly?

Jamal Yes, but that didn't work.

Rebecca Then the first thing to try is logging off and logging back on again. I'll stay on the line while you do that, OK?

Jamal OK, that's easy. I'm logged off now so let me enter my log-on name again. Let's see ... it's working!

Rebecca I'm glad we could get you back in business.

Jamal Thanks for your help.

Rebecca No problem. That's what we're here for!

HOW TO BE ENTHUSIASTIC

Both you and your customer benefit when you decide to be enthusiastic. Nobody likes to be involved in a call where either party has a bad attitude. You can't control the attitude of your customer, but even though it's not always easy, you can control your own attitude.

- Constantly check your attitude so you handle each call professionally and with a helpful attitude.
- Treat every customer as if they were your only customer. When you do, you'll give the kind of service you'd want to get if you were the caller.

ENTHUSIASM GENERATORS

Because it's not easy to Be Enthusiastic about every call, it's useful to build enthusiasm by looking at the next call from a new point of view. When your enthusiasm is low, approach the next call in the following ways.

WITH INTEREST	What will this customer have to say?
WITH EMPATHY	I know this person needs my help.
AS A CHALLENGE	Let me see how well I can help this customer.
AS AN OPPORTUNITY TO DO THE RIGHT THING	I'd want to deal with someone who had a helpful attitude if I was calling.

WHAT WORKED

Take a look at the successful example to see how Rebecca decided to Be Enthusiastic before she took the call from her customer.

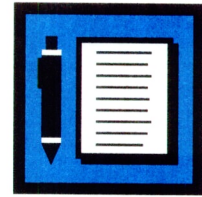
1. **She checked her attitude**, recognized that she was in a bad mood, and decided to do the right thing by taking the next call with a helpful attitude.
2. **She treated her customer as if he were her only customer**, even though she had helped many other people with this same problem.

YOUR WORLD

Here's your chance to apply what you've learned to your situation. Just follow these easy steps, and jot down your answers to each question in the space below.

1. **Make a list of typical situations** that cause you to lose your enthusiasm for helping customers. This exercise will be most meaningful if you think of typical situations from your job. However, if nothing comes to mind or if you're new on your job, you may use the situations in the box on the following page.

What are the situations? (Answer only if you pick your own situation.)



Alternative Situations

- When you feel you are taking more calls than a co-worker so you're carrying more of the workload
- After you take calls from critical customers
- After you take calls from customers who are hard to satisfy
- When you have to solve tough problems that aren't your fault
- When you are in the final minutes of your last shift of the week

What will you do to be sure you treat these customers as if they were your only customer?

CHOOSE TO C.A.R.E.

CONNECTED

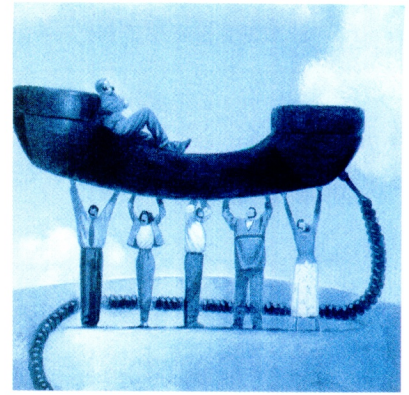
ATTENTIVE

RESPONSIBLE

ENTHUSIASTIC

ACTION STEPS

- Constantly check your attitude.
- Treat every customer as if they were your only customer.



Chapter 6: Be a Service Pro

Stress just seems to be part of the job when you're a customer service rep. That's why service professionals watch for times when they're getting too stressed-out to either feel good about their jobs or to help their customers.

PUT ON YOUR OWN OXYGEN MASK FIRST

If you've traveled on an airline, you've probably heard the announcement that, "in the case of loss of cabin pressure, oxygen masks will drop from the ceiling," and that "if you're traveling with someone who needs help, put on your own oxygen mask first." That's because you can't help someone else when you're unable to function yourself. The same is true with customers: You can't help them when you're too stressed-out to be Connected, Attentive, Responsible and Enthusiastic.

WHAT'S IN IT FOR YOU

In this chapter you'll learn to:

- Choose to take action to reduce your stress.
- Know which stress management tools work best for you.

STRESS TEST

- | | yes | no |
|---|-----------------------|-----------------------|
| 1. Do you find yourself being impatient with customers or co-workers when you'd like to have more patience instead? | <input type="radio"/> | <input type="radio"/> |
| 2. Do parts of your body, such as your shoulders or neck, feel tense or even hurt at work? | <input type="radio"/> | <input type="radio"/> |
| 3. Do you find it hard to stop thinking about work after you leave for the day? | <input type="radio"/> | <input type="radio"/> |
| 4. Do you get sick often? | <input type="radio"/> | <input type="radio"/> |
| 5. Do calls from difficult customers regularly upset you? | <input type="radio"/> | <input type="radio"/> |
| 6. Do you regularly find yourself rushing at work? | <input type="radio"/> | <input type="radio"/> |
| 7. Do you juggle several things at once on your job? | <input type="radio"/> | <input type="radio"/> |
| 8. Do small problems bother you more than you would like? | <input type="radio"/> | <input type="radio"/> |
| 9. Are you regularly late for work and other events? | <input type="radio"/> | <input type="radio"/> |
| 10. Do you regularly cut your breaks short to take care of work? | <input type="radio"/> | <input type="radio"/> |

This isn't a scientific test, so we're not suggesting which scores indicate low or high stress levels. But take a look at your answers and decide for yourself how much stress you feel at work.

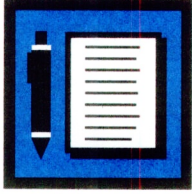
HOW TO MANAGE THE STRESS OF YOUR JOB

Choose to take action to reduce your stress. A popular image of contemporary culture is that of stressed-out people with seemingly little or no ability to step out of the rat race. But the fact is, we can take control of the stress of the world we live in. But to do that, you first have to tune into your stressed-out feelings, and then choose to do something about them.

Ten ways to manage the stress of your service job

1. **Take a one-minute vacation**—Imagine yourself in your favorite vacation spot. Better yet, imagine your ultimate vacation. This one's free! What's best about this free vacation is that your mind won't distinguish between you actually being there and the vivid mental images of being there, and your body will get the same calming feelings as if you were actually there.
2. **Breathe**—Take relaxed, moderate breaths. It's nearly impossible to feel stressed while you're doing this exercise.
3. **Talk or think positively about what you just learned**—You're likely to feel better about a stressful situation if you feel you gained something useful from the experience.
4. **Walk (or do other exercise)**—Exercise, even around the office, is a proven stress releaser.
5. **Be concerned, not worried**—Concern is the process of recognizing a problem and taking whatever action is within your power, then moving on. Worry is the process of going over the situation time and time again in your mind. The problem is—worrying doesn't change anything.
6. **Organize**—This may help you feel more in control.
7. **Take a health break**—Get away from your desk and do something unrelated to your job for a few minutes, when possible.
8. **Laugh at the situation**—Laughter is one of the best ways to release stress.

9. **Identify a change (small or large) that will impact the situation**—This is another way to help you feel more in control. It may also help you to believe that the future will be better. For example, you might develop a list of phone numbers that will help you get information more easily in similar situations or you might have a conversation with a co-worker about a problem.
 10. **Do something that uses your creativity**—It's hard to feel stress when the creative part of you is active. For example, you might think about fun things to do on your day off or brainstorm creative ways to celebrate a co-worker's birthday or new baby.
-



YOUR WORLD

Here's your chance to decide how you'll handle stress on your job. Just follow these easy steps, and jot down your answers to each question in the space below.

1. **Make a list of typical situations** that cause you to feel stressed at work. This exercise will be most meaningful if you think of typical situations from your job. However, if nothing comes to mind, or if you're new on your job, you may use one of the situations in the box.

What is the situation? (Answer only if you pick your own situation.)

Alternative Situation

- When you know there are many customers waiting on hold
- After you have taken a call in which you weren't able to satisfy your customer
- When you have worked overtime
- When problems at work are hard to handle

*Which of the 10 ways to handle stress will be helpful for you in each situation?
Feel free to include your own methods for handling stress on the job.*

ACTION STEPS

- Choose to take action to reduce your stress.
- Know which stress management tools work best for you.

Help For Facilitators and Trainers

USING THE WORKBOOK WITH A GROUP

Assign a person to organize the training and to facilitate each session. The person should have basic facilitation skills and a good understanding of the material.

Determine the number of participants. An acceptable number of people in a learning group ranges from two to ten. However, a facilitator with a great deal of experience may be able to work successfully with groups of up to 16 learners.

Notify participants about the time and location of the session and any pre-work they are expected to do before the session.

Write an agenda for each session.

SESSION AGENDAS

Chapter 1

- Course overview
- Information about mental messages
- Your choices of mental messages
- Action steps
- Next session

Chapters 2 through 5

- Last session's information
- Information about (insert topic from the chapter you are covering)
- Unsuccessful example
- Successful example
- How to (insert topic from the chapter you are covering)
- Practice
- Action steps
- Next session

Chapter 6

- Last session's information
- Stress test
- Information about reducing stress
- Your choices for reducing stress
- Action steps
- What you've learned during this course

DETAILED FACILITATION PLAN

This plan lays out a total of approximately eight hours of training time. You'll find options for adjusting the length of the training following this section.

Chapter 1 35 minutes total

Introduction 15 minutes

- Give an overview of the course.
- Explain the reason this learning group has been formed.
- Review the agenda for today.
- Ask participants to read the first two pages in the chapter.
- Ask a participant to summarize the main points.
- Direct the participants' attention to any points that have been missed.

How to CARE 15 minutes

- Ask participants to answer the questions in the workbook about mental messages.
- Ask the group to discuss how they will apply this information to their situations.

Wrap-up 5 minutes

- Ask a participant to review the action steps from this session.
 - Confirm the meeting time and location for the next session.
-

Chapters 2 through 5 **90 minutes total**
(per chapter session)

Introduction **10 minutes**

- Review the agenda for today.
- Ask participants to discuss how they have been using the information they learned in the last session.
- Ask participants to read the first page in the chapter and the page titled, "What's In It For You."
- Ask participants if they have any questions or comments.

Unsuccessful Call **20 minutes**

- Ask participants to read the Unsuccessful Call example and answer the "Think About It" questions in the workbook.
- Ask participants to share their answers to the "Think About It" questions for the unsuccessful call.
- Ask the group to discuss similar situations and experiences from their own work lives.

Successful Call **15 minutes**

- Ask participants to read the Successful Call example and answer the "Think About It" questions in the workbook.
- Ask participants to share their answers to the "Think About It" questions for the successful call.
- Ask the group to discuss similar situations and experiences from their own work lives.

"How to ... Section" **20 minutes**

- Ask participants to read the "How to ..." and "What Worked" sections for this chapter.
- Ask a participant to summarize the main points in the "How to ..." and "What Worked" sections.
- Ask other participants to add to what the first participant said.
- Direct the group's attention to any points that have been missed.
- Ask participants to do the writing activity (in chapters 3 and 4 only).
- Ask participants to discuss their responses (chapters 3 and 4 only).
- Ask participants how they will apply this information to their situations.

Practice Makes Perfect **20 minutes**

- Ask participants to pair up to practice situations from their world.
- Move between groups to observe how participants use the skills.
- Bring the group back together to discuss what they've noticed and learned while practicing.
- Add comments about what you observed during the role play.

Wrap-up **5 minutes**

- Ask a participant to review the chapter's "Action Steps."
- Confirm the meeting time and location for the next session.

Chapter 6 **45 minutes total****Introduction** **15 minutes**

- Review the agenda for today.
- Ask participants to discuss how they have been using the information they learned in the last session.
- Ask participants about the level of stress they experience on their jobs.
- Ask participants to read the introductory comments about stress and to take the stress test. (Let them know, in advance, that you won't ask them to share their answers.)

How to Manage Stress **20 minutes**

- Ask participants to read about what they'll learn in this chapter and about how to manage stress.
- Ask if there are any questions or comments.
- Ask participants to answer the questions in their workbook about reducing stress.
- Ask participants to discuss how they will apply this information to their situations.

Wrap-up **10 minutes**

- Ask a participant to review the action steps for this chapter.
 - Ask participants to discuss what they learned during this course and how they feel the information applies to them and their jobs.
-

USING THE VIDEO WITH THE WORKBOOK

Viewing the "It's Your Call" video with the workbook will enhance the effectiveness of the training. No doubt, participants will enjoy the exciting visual presentation, humor and motivational message this video offers.

If you use the video, watch it before you use the workbook, section-by-section while you use the workbook, and then again after you've finished the workbook. Add 30 minutes to the length of the first and last sessions, and 15 minutes to the length of the other sessions. Follow the video with a discussion of what participants learned from the video and how they feel the information applies to them and their jobs.

Adjusting the Length of Your Training

While the Detailed Facilitation Plan has been carefully designed to give participants the best possible opportunity to learn how to give remarkable customer service, we realize that in some situations time constraints may make it impossible to use all elements of the plan. This shortened plan allows you to use the workbook and video under those circumstances. The total training time with the video is about 4 hours (when you show the video only at the beginning of the session), and about 3.5 hours without the video.

Chapters 1 and 6

20 minutes per chapter

- Ask participants to read the entire chapter.
- Ask participants to write answers to the questions.
- Ask participants to discuss their answers to the questions.

Chapters 2 through 5

40 minutes per chapter

- Ask participants to read the entire chapter.
- Ask participants to write answers to questions in the "Your World" section.
- Ask participants to complete the "Practice Makes Perfect" activity described in the "Your World" section.
- Ask participants to discuss what they learned and how they feel the information applies to them and their jobs.

FACILITATION TIPS

Effective facilitation is essential for successful group learning. Effective facilitation means helping participants to be clear about the organization of the session and about what's expected of them. However, successful facilitation does not mean having all of the answers. Participants also have valuable answers, opinions and ideas to contribute. Here are some suggestions to help you facilitate smooth and effective learning sessions.

- Arrive early.
 - Manage the room so it is clean, comfortable, appropriately lit and quiet.
 - If possible, set chairs around a long or horseshoe-shaped table so each participant can see each other's face and the front of the room.
 - Start and end on time. This is an important way to show respect for the participants.
 - Give simple and clear instructions.
 - Keep the conversation on the topic. If the discussion wanders, politely but firmly draw it back to the agenda.
 - Encourage discussion by asking open-ended questions rather than questions that have right or wrong answers or a simple "yes" or "no" answer.
 - Respect all opinions.
 - Manage participants who dominate the conversation by calling on others to contribute.
 - Ask for input from participants who are silent.
-

ANSWER GUIDE FOR QUESTION TYPES

(see "Using Open Minded Questions" quiz, page 33)

Question	Type
1. What would be a good solution for you?	Open minded.
2. Will this work for you?	Open minded.
3. That's been going on for a long time, hasn't it?	Leading. The question suggests that it's been going on for a long time. An open minded question would be, "How long has that been going on?"
4. Would you like to see our technician on Wednesday or Thursday (when there are other choices available)?	Leading. The question leads the customer to choose Wednesday or Thursday when a different day may be preferred. An open minded question would be, "When would you like to see our technician?"
5. It's worse than before, isn't it?	Leading. The question suggests that it's worse than before. An open minded question would be, "How is it compared to before?"
6. What can I do for you today?	Open minded.
7. This isn't too big of a problem, is it?	Leading. The question suggests that the problem isn't too big. An open minded question would be, "Is this a significant problem?"
8. You don't have any more information, do you?	Leading. The question suggests that the customer doesn't have any more information. An open minded question would be, "Do you have any more information?"
9. How well did that work for you?	Leading. The question suggests that it worked, the only question is "how well." An open minded question would be, "Is that working for you?"
10. Has this happened before?	Open minded.