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# Outstanding Customer Service, Telephone Skills and Email Etiquette

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# **Positive Attitude — Take 100% Responsibility**

## **Why 50/50 Doesn't Work**

People often think that in a relationship, each person is 50% responsible. Does this mean that each person is only 50% committed to the outcome?

- How successful is a marriage if when taking their vows each person says they are 50% committed?
- As a patient do you want a nurse who takes 50% of the responsibility to check a critical medication prior to surgery, relying on the doctor for that other 50%?

## **Those who apply the 100% principle don't sit back and expect things to happen – they make things happen!**

1. A customer calls in with a problem. The service rep. doesn't have the expertise to resolve the situation immediately, so she stays on the line and calls a supervisor who is able to fix the problem. She remained present until the handoff was complete. She didn't say, "It's not my job" and the customer didn't need to call back.
2. Scanning your organization's website, you find inaccurate information. It isn't your job, but you call to alert someone about the error. You are concerned about customers receiving inaccurate information; the organization might not be perceived in its best light.

## **Notes:**

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## **Maintain Professionalism and Strengthen Relationships**

Outstanding customer service starts with building relationships. We do this by maintaining professional behaviors and attitudes regardless of the situation. Whether customers are internal or external to your organization, are local or geographically dispersed, or have different needs and interests, building strong, lasting relationships is the key to your professional success. You need to earn trust quickly so that customers want to do business with you again.

### **Dale Carnegie's Principles:**

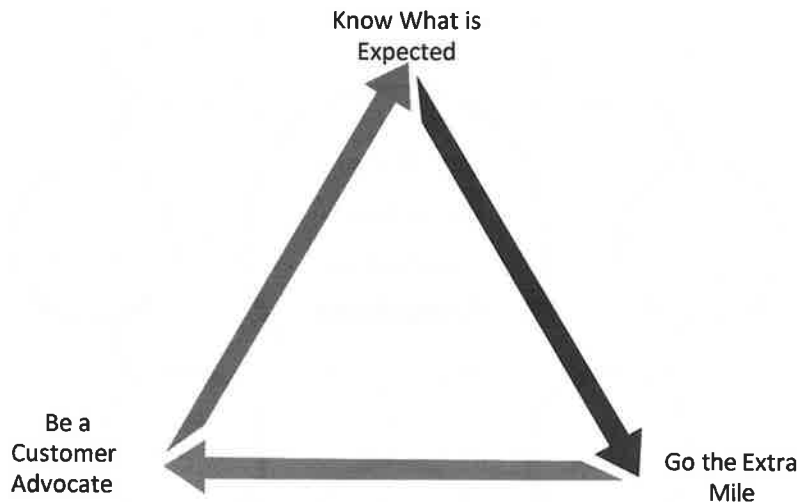
*How to Win Friends and Influence People*

*by Dale Carnegie*

- 1. Don't criticize, condemn, or complain**
- 2. Give honest, sincere appreciation**
- 3. Arouse in the other person an eager want**
- 4. Become genuinely interested in other people**
- 5. Smile.**
- 6. Remember that a person's name is to that person the sweetest and most important sound in any language.**
- 7. Be a good listener. Encourage others to talk about themselves.**
- 8. Talk in terms of the other person's interests.**
- 9. Make the other person feel important—and do it sincerely.**

# Principles to Deliver World-Class Customer Service

Use these principles to contribute to your organization becoming a World-Class Customer Service provider.



## Telephone Courtesy Tips

- Push your personality through the phone
- Fill the silence when appropriate
- Be conversational
- Call instead of using email
- Give your full name
- Stand up when you can
- Listen for understanding
- Ask permission before using a speaker phone
- Ask open-ended questions
- Speak at the same rate as the caller
- Allow the person time to think and speak
- Pause between ideas for clarity
- **Always thank the caller**

# Complaint Resolution Process



## 1. Greet

Always answer the phone or greet someone in person as if you are happy to hear from them. Begin in a positive and friendly way. If you “live in day-tight compartments,” separating previous negative experiences with this customer from the current one, you can be more effective.

## 2. Listen

Since we often get the same kinds of complaints, it becomes challenging to really listen to each customer. Give people an opportunity to vent their frustration. Be empathetic. Listen for feelings as well as facts. Resist responding too quickly. Show active listening with brief interjections or clarifying questions.

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### **3. Ask Questions to Clarify the Concern:**

**Elementary** questions capture basic facts of the problem. They provide an opportunity to take some of the emotion out of the complaint.

**Elaborative** questions gather more details. With these the customer has a chance to expand on issues and feelings. Questions should be short to encourage customer dialogue.

**Evaluative** questions help you understand the severity of the issue in the customer's perspective and help you determine what will satisfy the customer.

### **4. Empathize:**

Find a point of agreement. This does not mean you have to agree with the complaint. Show that you heard and understood the customer's concern and recognize its importance.

### **5. Address the Issue:**

Once the emotional issues have been addressed, do everything you can to resolve the practical aspects of the complaint. Take responsibility for your organization's actions. Turn a lemon into lemonade. People who have problems successfully resolved usually continue to do business with you.

### **6. Test Questions:**

Ask questions to test how well you have resolved both the emotional and practical sides. Give the customer another opportunity to speak, and be a good listener.

### **7. Offer Additional Help:**

Ask what else you can do for this customer. This turns the conversation away from the complaint, making it easier to end on a positive note.

### **8. Follow Through:**

Often, complaints cannot be resolved completely on the first point of contact. Get back to the customer quickly and thoroughly. Even if the complaint has been resolved, create a reason to contact the customer again. Find a way to give added value. Also look for ways to solve the root causes of problems within your organization.

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## How to Handle Challenging Customers

When faced with a complaint or an irate customer it is easy to lose track of the real issue and get caught up in the moment. Use these guidelines to improve the outcome with the customer and make it more likely for him or her to return for repeat business.

- A. Stay calm; remain diplomatic and polite.
- B. Don't take it personally.
- C. Try to see things from the customer's point of view. You might feel just as upset if you were the customer in the same situation.
- D. Listen empathetically; thank the person for raising the concern, and do it sincerely.
- E. Use the customer's name.
- F. Ask questions to get their facts and feelings out. Listen to learn rather than to prepare your next response.
- G. Find points of agreement with his or her concerns.
- H. Create an opportunity to be a hero.
- I. Always show willingness to resolve the conflict. Make the resolution seem as easy as possible.
- J. Take ownership.
- K. Be genuine and show your personality. Respond as an understanding friend rather than by citing policies.
- L. Treat the diseases, not the symptoms.
- M. Be firm but understanding with your answers; show confidence.
- N. As a last resort offer to have your manager talk to the customer to reinforce the positive message that you and your organization want to resolve the matter promptly.



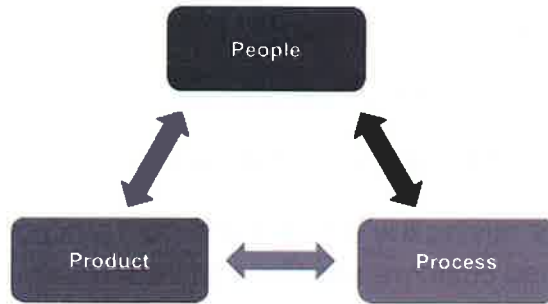
# Slight Edge Theory



## What is it?

Small changes over an extended period of time can have a major impact on results.

In customer service and sales, a slightly more focused and sustained effort to make minor positive changes over time can create an “edge” that separates us from our competition.



## Opportunities for Change

	Common Problems	Small Changes We Could Make
People		
Process		
Product		

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# Dealing with Irate Customers

What are the most common situations you face with irate or difficult customers?

## Strategies for Dealing with Irate Customers

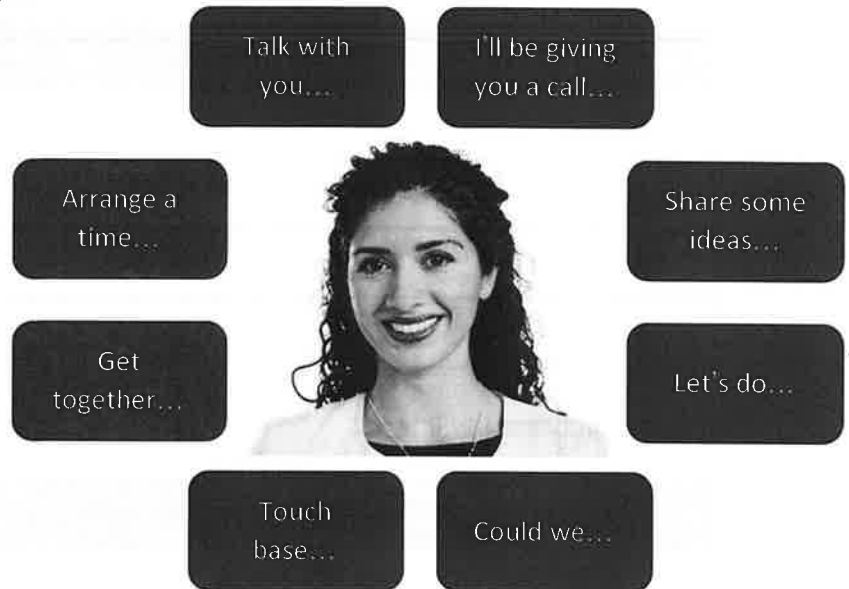
- Stay calm. Try to remain diplomatic and polite.
- Try to see things from the caller's point of view.
- Thank the person for raising the concern and do it sincerely. Emphasize the importance of satisfied customers to you and your organization.
- Listen for understanding. Sometimes they only want someone to listen to their story.
- Ask questions to get their facts and feelings. Listen to learn rather than to prepare your response.
- Find points of agreement with their concerns. Establish common ground.
- Always show a willingness to resolve the problem or conflict. Make the resolution seem as easy as possible.
- Be genuine and show your personality. Do not cite policies.
- Be firm but understanding with your answers.
- Offer to have the caller talk to your supervisor only as a last resort. Sometimes hearing the message from someone else has a positive effect.

## Notes

# Conversational Language

What is conversational language?

- Non-directive
- Casual
- Non-threatening
- Low pressure



Which of these phrases sounds better and why?

Directive	Conversational
What I want to do now is ...	Let's go over ... Could we...
What I'm going to do is ...	Let's do ...
Talk to you ...	Talk with you ...
I will call in ...	I'll be giving you a call in ...
What you should do is ...	What you might want to do ...
What you need to do is ...	Might I suggest that ...
What you must do is ...	Perhaps you may want to ...
What you have to do is ...	Possibly you may want to ...
This allows you to ...	This makes it possible for you to ...
The reason I am calling is to inform you about...	The reason I am calling is to briefly share with you some ideas ...

# Summary

The most useful ideas I gained:

Useful Ideas
1.
2.
3.
4.

Specific actions I will take:

What	When

Business impact:

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# 28 email etiquette guidelines for the workplace

When sending or replying to emails, here are some best practices for email etiquette to keep in mind:

## 1. Use standard formatting

Standard fonts, such as Times New Roman or Arial, colors and sizes are appropriate for business emails. If you use bold or italics, try not to use them on more than one word or a string of words in a single email. If you're copying and pasting text, clear the formatting before sending the email because it could appear different from the rest of your text. To clear formatting, you can use "Command + \\" on a Mac or "Ctrl + Shift + N" on a PC.

## 2. Include a clear subject line

Title your email so the recipient knows what the message is about. For example, if you're emailing to follow up on a presentation, you might write, "*Quick question about your presentation.*" Emails with clear and brief subject lines often have better open rates, so it's useful to be descriptive without sharing too much information. Also, consider how much text the email provider can display in an inbox so that your message appears complete.

## 3. Email from a professional email address

Use a company email address if possible. Though, if you're self-employed or using a personal email address for work-related correspondence, ensure that your email address doesn't contain any words that some might consider unprofessional. If so, then consider setting up a work-only email address.

## 4. Use the correct email format

A business email has a specific but simple structure, which includes a subject line, greeting, body and a sign-off. The body of your email may be in short paragraphs. Organize the information in the body section so your recipient can easily understand your message.

## 5. Use professional greetings

Choose a salutation that's appropriate for the relationship you have with the recipient. If you're emailing a coworker, a casual greeting such as "*Hello*" may be appropriate. If you're contacting someone for the first time or if they're a professional acquaintance, use a more formal greeting like "*Dear Sarah Atkins.*" It's recommended to use the person's name exactly as it's shown in their email signature line. This means don't assume someone named Jennifer goes by Jen unless you've seen them sign their emails that way.

## 6. Use an introduction

Depending on who you're emailing, it's best to introduce yourself by your first and last name and the company you're representing in the first few lines. This is especially important when emailing new contacts, clients, potential customers or employers. Let them know how you received their contact information. **Example:** "*My name is Jessica Franklin and I'm with White Label Agency.*"

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Mark Gregston gave me your name and suggested I contact you regarding your amazing printing services”.

### **7. Choose your salutation and sign-off carefully**

When sending a business email, choose appropriate salutations. This can help your correspondence appear more professional. Examples include:

- *Hello*
- *Hi*
- *Good morning*
- *Dear*

When ending your email, use a formal sign-off such as:

- *Sincerely*
- *Kind regards*
- *Best wishes*

### **8. Be cautious with "Reply all"**

The benefit of using *"Reply all"* is that you can respond to everyone at once to let them know you're addressing an issue. When in doubt, use *"Reply"* to avoid inundating a list of people with unnecessary emails. To determine which to use, consider the information you're sharing and who it most affects.

### **9. Avoid using all caps**

Use sentence case as you would for any formal communication. It's unprofessional to use all caps; doing so can misconstrue your intentions and meaning. **Example:** *"Anne, it was great seeing you at the meeting. I look forward to connecting again soon."*

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### **10. Double-check attachments**

If you can copy and paste information into an email rather than attaching a document, do that. If not, let the recipient know in the body of your email that you're attaching a document. It's also good etiquette to compress the documents or attach them in a zip file so it takes up less space in their inbox. In addition, you may want to consider uploading documents to a shared location and giving the recipient a link to access them.

### **11. Shorten links**

When sharing a website, use a link shortener to shorten the link or hyperlink text within the email. Including links in this way can help your email appear clean. A short link is also easier to copy and paste into a web browser.

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## **12. Proofread**

Proper spelling and grammar are important when sending business correspondence so always proofread your work before you hit send. Likewise, double-check the spelling of the recipient's name and email address because autocorrect may alter names. You can install plugins to check your writing and find errors automatically.

## **13. Don't use emojis**

Even if the recipient has used emojis when communicating with you, resist the temptation to use them yourself. They can come across as unprofessional in certain company cultures. Instead, you can express emotion with words and your tone.

## **14. Reply within 24 hours**

When someone emails you, replying within 24 hours is common courtesy. If you've unintentionally passed this timeframe, apologize and politely explain the delay. In your emails, you may provide a gentle reminder about time sensitivities so that the recipient members to reply quickly.

## **15. Keep your tone professional**

Think carefully about your word choices in an email and how others may interpret your intention. Use positive words, such as "*opportunities*" and "*challenges*," instead of "*obstacles*" and "*limitations*." Avoid negativity, sarcasm and adjectives that can cause you to sound overly emotional.

## **16. Perfect your email signature**

An email signature is a special text box that displays your contact information at the bottom of an email. A signature typically includes only your name, job title, company website and phone number. If you don't have an email signature, creating one is useful because it can make your emails appear more professional.

## **17. Use Bcc appropriately**

Bcc stands for blind carbon copy, which is similar to Cc except that the email recipients specified in the Bcc field don't appear in the header or to the recipients in the To or Cc fields. Using Bcc is good etiquette if you want to protect someone's email address rather than exposing it to others. For example, if you're emailing a group of subcontractors about a change in policy or procedure, it's considerate to Bcc everyone on the list.

## **18. Think before forwarding**

A good practice for forwarding is to summarize what's being discussed, so the recipient quickly knows what you need from them. It's also important to remember that some emails may contain private or sensitive information, so you might not be able to forward them. Use caution when forwarding and ask permission from the original sender if you're unsure to whom you can forward the email.

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### **19. Set informative out-of-office replies**

If you plan to be out of the office for an extended period, set up an automated out-of-office reply to let people know you won't be able to respond to their emails until a specific date. Include a contact name if there's an urgent matter. Include "Out of Office" and the date in the subject line so recipients can quickly recognize that they've received an automatic response. It's also helpful to include the first line in the message as: "*This is an automated message while I am out of the office.*"

### **20. Reply to all your emails**

It's polite to respond to all the emails you receive. If you receive many emails, you can sort the spam emails and unsubscribe from email lists where you no longer want to participate. Senders may even appreciate a brief response to their emails so they know you're receiving them.

### **21. Refrain from using humor**

Humor is very subjective and may not be appropriate for email correspondence. Your recipient may misunderstand a joke. Instead of humor, you can entertain your recipient with a light and positive tone.

### **22. Be aware of cultural differences**

What's appropriate in your culture may be insensitive to another, so it's important to recognize cultural differences and remain respectful. You can do this by researching the person to whom you may send an email. You can also be aware of cultural differences by increasing your self-awareness.

### **23. Use discretion**

Use caution when sharing information over email because it may not remain confidential. Be sure to protect private or sensitive information about yourself and others. For example, don't share passwords over email.

### **24. Embed your answers**

When replying to an email with three or more questions, you may embed your answers. This organizes the information for the recipient and may make communication easier. When you embed your answers, you can just copy and paste the questions from the previous email and include your answers underneath each question.

### **25. Include a call to action**

A call to action is useful in emails because it informs the recipient of what you want them to do with the information. For example, you may request your colleague to provide feedback on your work or ask that a team leader share the information you give with their team. It's effective to include your call to action at the end of your message so that the recipient can take action as soon as they finish reading your email.

### **26. Use Proper Grammar**

Use full words. Do not use texting attributes to an email. Such as; *You are* or *You're* vs *UR*; *I* vs *i*.



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**27. Write the email address last**

Consider inputting the recipient's email address last. This prevents you from accidentally sending an email before you finish it. If you click send early, the email doesn't send because there's no address.

**28. Ensure your message is mobile friendly**

Many people read their emails on their mobile devices. With this in mind, ensuring your email's easy to read on a phone or tablet is polite. You can also make your email mobile-friendly by keeping your message brief.

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