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# HVAC

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## Coaching Corner



## The Art of Customer Service

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## The Role of a Customer Service Representative

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NOTES

*Greeting the Customer*

There are a wide variety of ways that companies greet incoming callers. It is recommended that every caller receive an enthusiastic, appreciative greeting that identifies the CSR, the company, and above all, communicates to the customer that they are welcome and appreciated. It should also include a statement expressing your willingness or ability to help. Your company probably asks you to use a greeting that accomplishes most, if not all, of those objectives.

Here are some common examples:

“Thank you for calling ABC Heating & Cooling, my name is \_\_\_\_\_, how can I help you today?”

“Thank you for calling ABC Heating & Cooling, this is \_\_\_\_\_, what can I do for you today?”

“It’s a great day at ABC Heating & Cooling, this is \_\_\_\_\_, I can help you today.”

To review, regardless of the style of greeting your company chooses, it should include:

- A statement of appreciation
- Your company name
- Your name
- Your willingness or ability to help

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***Step 1 – Ask***

After opening the call with an effective and welcoming greeting, some callers enjoy a little small talk or exchanging pleasantries. This is acceptable as long as the exchange is brief and appropriate. Once that is complete, you are ready to begin the first step.

The objective in the first step is to discover or uncover the caller’s needs. Most callers know that there is a problem, but they may not know what they need to resolve it. For example, they may know that their air conditioner is not cooling, but they probably know very little about what may be causing the failure.

It is important that you ask questions that might uncover the root cause of the problem. The best approach, as we learned in an earlier module, is to use probing questions. This type of question promotes more listening than speaking on the part of the CSR. If the CSR is listening and allowing the customer to speak, the cause of the problem will surface and the call will be dispatched more accurately.

Examples of effective probing questions include:

“Is it cooling at all?”

“Is it blowing any air at all?”

“Is the thermostat set correctly?”

“Have you checked the breaker?”

“Have you changed the filters recently?”

Again, the objective is to gather information about the customer’s needs. Asking questions, of course, is the best way to get the answers you need to arrive at a diagnosis – the next step.

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malfunctioning. Let's schedule a technician to come out and take a look. Does that sound like a good solution to you?" This extra step may not be necessary in every case, but it is a good practice when you want or need confirmation that you are going after the right problem, and more importantly, that the customer feels your actions will resolve their issue.

Once your diagnosis is complete, you are ready to move to the next step.

**Step 3 – Act**

Your diagnosis is now complete and you are ready to take action. That action could possibly include a variety of things. For example, it could include one or more of the following:

Booking the call.

Entering a work order.

Communicating with a dispatcher.

Communicating with a technician.

Communicating with a service manager.

Try to complete this action while the customer is still on the line. Customers like to hear that their issue is being addressed. You may for example, schedule the call via a computer based system or application. In that case, you would check the next available opening and communicate that to the customer. This process will vary from company to company, but it is always a more positive experience for the customer if you are able to take the action immediately and then let the customer know what you have done.

For example, you might say, "OK, Mr. Johnson, it looks like I can get a technician out to you this afternoon at 4:00pm. Will that work for you?" Then,

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“Great, I have Joe schedule to arrive at your home at 4:00; he’ll take a look at that thermostat for you then. Is there anything else I can do for you?”

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

**Step 4 – Please**

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

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

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response. Listen intently to make sure you have resolved the issue fully and that you did not miss anything along the way.

Once the customer confirms that you have done so effectively, ask if there is anything else they might need. For example, you could respond with, "Great, is there anything else I can do for you today?" This is a good opportunity to capture cues that may lead to additional sales.

It may also present a good opportunity to introduce any promotions or new products your company may be attempting to bring to market, IAQ for example. You could introduce it by saying, "Mr. Johnson, did you know that our company can assess the quality of your indoor air for you? Is that something you might be interested in?" If the customer shows interest, lead the conversation towards an IAQ evaluation or other product if applicable. The bottom line is, listen intently to what the customer says – you never know when a sales opportunity will present itself!

Once you are confident that the customer is fully satisfied, you are ready to move to the fifth and final step.

***Step 5 – Thank***

The fifth and final step in the A.D.A.P.T. call handle process is the *thank* step. This step begins with a warm and sincere "thank you." Let the customer know that you and your company really appreciate their business. When customers hear this, they cannot help but feel welcome and appreciated. Of course, this is a moot point if all of the actions you promised are not delivered. But, it is critical that

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you thank the customer for giving you the opportunity to serve them.

You can express this gratitude in a variety of ways. For example, "Mr. Johnson, I really appreciate your calling us today. Our company appreciates the opportunity to serve you."

The next part of this step is to summarize the call. This is a very nice and tidy way to begin the wrap up of the call. It is especially effective when there is more than one issue to cover. For example, let's say that you have set an appointment and for clarification of this point, that you have promised to send some literature related to IAQ. You could say to the customer, "OK Mr. Johnson, I have Joe scheduled to come to your home today at 4:00pm to look at your thermostat. I also am going ask Joe to leave that brochure I mentioned to you about IAQ. If you have any questions about that, feel free to call me back at your convenience."

Summarizing the call reminds the customer of important elements of your conversation and gives your call a high degree of professionalism.

Next, if you have not already done so (some companies like to do this at the front end of the call), ask the customer how they came to call you.

This is an effective way to check your marketing activities. Your supervisor or manager may ask you to track this somehow. It is an important component for the effectiveness of your company's marketing and advertising programs.

Once you have that information, take ownership of the customer's situation by personalizing the closing of the call and asking them to call you personally if they have any concerns. It is important that you do this however, without showing any concern that their issue will not be handled

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properly. For example, say, “Mr. Johnson, let me go ahead and give you my direct number in case you have any questions or need service in the future. Again, my name is \_\_\_\_\_, and my number here is (123) 456-7890.” If your company has a particular procedure in place with regard to this, make sure you follow that procedure.

Finally, ask the customer to share their experience with others. You have already secured their satisfaction in step 4, so you know they have had a positive experience so far. Ask them to tell their family, friends, neighbors, and co-workers about you and your company. Customer referrals are one of the most effective ways to grow your business.

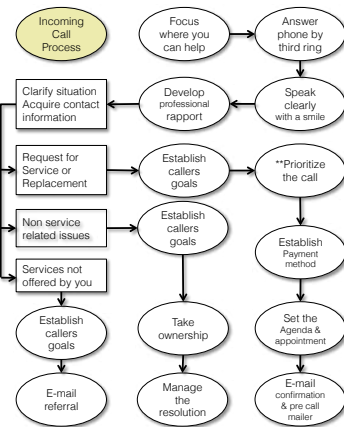
# The Role of a Customer Service Representative

## Processes and Practices

### Section 1: Incoming call process

#### Benchmarks

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



\*\*call prioritization protocol may change with business cycle

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### Incoming call Benchmarks

- Answer phone before third ring
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### Incoming call standards

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

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Always

- Answer the phone with-in the third ring.
- Speak clearly with a “Smile in your voice”.

Always

- Clarify your callers situation
- Affirm that you can help them
- Acquire contact information

Always

- Document exactly what your customer wants
- Clarify what they want by repeating it to them.

Prioritize each call  
Establishing a protocol simplifies prioritizing each incoming call.

Example:

Priority #1

- Health or Safety issues
- Under warranty or agreement
- Equipment over 10

Priority #2

- Callers w/ equipment between 10-5

Priority #3

- Callers w/ equipment under 5

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Prioritize each call

Sample questions to ask:

- Have we serviced your equipment before?
- Are you a maintenance agreement customer?
- How old is your system?
- When was the last time it was serviced?
- Are there any health or safety issues?

Answers will allow you to

- Prioritize each call
- Keep your commitments
- Maximize opportunities

Payment method

- Explain fee for service
- Explain all methods of payments
- Ask which method would work best for them
- Instruct them to ask their Technician how they could qualify for a discount
- Document their payment option

(example)

“We charge an initial up front fee of \$\$ to Evaluate your system and document exactly what it will take to restore operation including the cost

After you pick the option that makes the most sense for you, we’ll finish the work.

You can pay by check, credit card, part by check and credit card if you like, or we can finance it for you. What works best for you?

We also offer up to 15% discounts on all services, be sure to ask our Technician how that program works, ok?”

### Set the agenda

- Commit to a date and window of time for arrival.
- Explain how much time the average call usually takes.
- Sell the person scheduled to perform the service
- Gain permission to send them an e mail confirmation along with a pre service checklist for them to review.
- Ask if there is anything else you can do for them at this time.

(Example)

“Tom is scheduled to be there between three and four o’clock.

Service calls generally take between two and three hours, are you ok with that time-frame?

Your going to like Tom. He’s the best.

If I could get your e mail address, I’ll send you a service confirmation and a check list for you to go over and review with Tom when he arrives.

Tom will call you when he is on his way.

Is there anything I can to to help?

Thanks for calling, we will see you this afternoon.”

### Pre call e mail

- Thank your customer for calling
- Estimated time of arrival
- Include a profile of the Technician assigned to their call
- Include a check list of the top 12 issues found with HVAC systems today, direct them to check anything in common with the list and review it with the Technician when he/she arrives.

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The goal of the check list is to

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

The goal of the profile list is to

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



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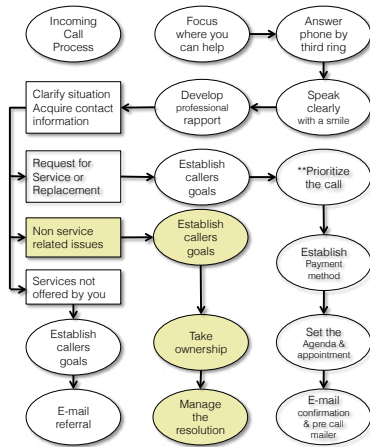
The Role of a Customer Service Representative

Processes and Practices  
Section 1: Incoming call process

Non service inquiry standards

Customer complaints

- Listen
- Empathize
- Apologize
- Isolate
- Fix
- Follow-up



\*\*call prioritization protocol may change with business cycle

### Complaints are Opportunities

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

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

A significant amount of research has been conducted on the subject of customer satisfaction.

The Technical Assistance Research Program (TARP), a research organization that was established in 1971 at Harvard University, has done the most notable of this research.

According to TARP, 25% of customers are, at any given time upset enough with a business entity to stop doing business with them. Yet only 5% of these customers will ever voice their complaint. From a service company’s point of view (like your company for example), you cannot fix what you do not know is broken.

This research also uncovered a very surprising finding with regard to complaints and customer loyalty. The research revealed that loyalty is actually *stronger* among customers who had a complaint with a company and had the complaint resolved in a professional and timely manner than it is among customers who never had a complaint in the first place. TARP listed the following as key points in support of this finding:

These customers stated that they know things can go wrong in any company.

These customers felt a stronger loyalty to the company because the company proved that they cared about them and valued them as customers.

These customers stated that they were more likely to purchase again.

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The TARP data shows that complaints are a valuable component of customer relationships. It proves that quick and professional resolutions to complaints build stronger customer loyalty. As a result, we should always thank customers for bringing complaints to us. They allow us the *opportunity* to identify shortcomings, address and correct them, and in the long run, reduce or eliminate similar complaints in the future.

Customer complaints

- Listen
- Empathize
- Apologize
- Isolate
- Fix
- Follow-up

***Listen***

These callers are typically emotional and often angry. First, listen carefully while allowing the caller to vent their feelings. In most cases, these callers just want to get things off their chests and want someone to hear them out. Here are some keys to accomplishing this effectively:

Don't interrupt. Let the customer have their say.

You will have an opportunity to respond later.

Don't match their aggression. Never argue with a customer; that is an argument you will never win.

Stay calm and eventually, the customer will mirror your demeanor.

Don't question the customer. Not yet anyway.

There may be a need to do that later, but

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initially, hear them out. You will know when they are done.

Don't take things personally. Remember that complaining customers typically know you are not responsible, but they do see you as a representative of the company. Remove yourself personally from the equation, regardless of how difficult that may be at times.

***Empathize***

After allowing the customer to explain the situation, however difficult that may be, you should then focus on responding with empathy. Empathy was defined in an earlier module as "putting yourself in the customer's shoes." We also learned that empathetic statements tell the customer that you care. This is especially critical in complaint situations.

With upset customers, these statements provide a cushion and lead the customer to believe that you understand and are willing to help.

Use empathetic statements generously. The amount of statements and the degree of empathy you use depends primarily on how upset the customer is. In other words, the more upset and perhaps irate a customer is, the more empathy you must show.

Examples of empathetic statements that you might use in complaint situations include the following:

***"I completely understand Mrs. Johnson, I would be upset too."***

***"I know exactly what you mean sir and I can see why you feel the way you do."***

***"I see what you're saying Mrs. Garcia and I can appreciate why you're upset."***

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Above all, do not ignore or dismiss their opinions, feelings, and attitudes as trivial. That will only fuel their anger further and make matters much worse.

***Apologize***

Next, apologize for the situation. This step is often difficult for some people. The key thing to remember here is that your apology is on behalf of your company. You know (and so does the customer by the way) that you may have had absolutely nothing to do with the situation that has prompted the complaint. But, as a representative, and in this case, spokesperson, of the company, it is critical that you present the apology. This simple act can diffuse the caller’s anger and immediately builds a bridge between the two of you. It could be the start towards a lasting relationship.

Some possible apologies include the following:  
***“I agree with you Mrs. Johnson; it should not have been handled that way. I am so sorry that it did and I am going to fix it for you.”***

***“I want to apologize for this situation sir and I assure you I can help you.”***

***“I am very sorry that wasn’t done correctly. I’m going to do everything I can to take care of this for you.”***

These statements are effective because they communicate a sincere apology and are followed by a positive statement that tells the caller that you are going to make things right.



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

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

### ***Follow-Up***

The final step in effectively handling a complaint call is the follow up. Successful CSRs know the importance of taking *ownership* of the situation, from start to finish. With any call, but particularly with complaints, you should adopt a “The buck stops here” mentality. That is, once you answer that call, the customer on the other end of the line is yours! You must then do everything in your power to make sure their situation is resolved.

More often than not, your work towards a solution will involve other people in your organization. If someone else drops the ball, guess whom the customer will want to hold accountable? That’s right – you! So, be sure the customer is satisfied throughout their experience with your company. If a problem may take some time to resolve, let the customer know what to expect, and let them know that you intend to stay on top of it through the end. One more important point about your follow up – you must follow up both during and after the resolution to the complaint.

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

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up activity might be a phone call the day the technician is scheduled to arrive. You might call and say, for example, ***“Mrs. Johnson, I just wanted to follow up and remind you that our technician will be coming by this afternoon to resolve that problem with your furnace. Please call me if you have any questions.”***

Then, it is a good idea to call after an activity you directed, in this example, after the technician has performed the work. This follow up call might include something like this: ***“I just wanted to touch base with you again Mrs. Johnson. Was our technician able to take care of everything for you?”***

Again, the follow up is critical to closing the loop on the complaint. Additionally, it makes a clear statement to the customer that you care and that your company will go to any length to assure customer satisfaction.

## Dealing with Irate Customers

If you have ever worked in a customer service role, you already know that it is inevitable that you will receive calls from irate customers. These callers are different from those with complaints, because the emotion they bring is highly elevated.

First and foremost, your approach should begin with the six-step strategy for resolving customer complaints from the last section. That process is a good core method that will guide you through the call. But, because of the emotionally charged disposition of the customer, there are additional special approaches that you can employ to effectively deal with these callers. They are:  
Never blame the customer.

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Avoid criticizing the customer’s emotional state.  
Focus on saving the customer, not the sale.  
Let’s look at each of these approaches in more detail.

***Never Blame the Customer***

At all costs, avoid placing any blame on the customer. The customer is already irate and on the defensive. Any comment that can in any way be interpreted as an accusation that the customer is at fault will only elevate the customer’s emotions. Instead, focus on the problem.

Another important element in this approach is avoiding “you” statements. No matter how diplomatically you phrase them, these phrases come across to the customer in a negative way.

Examples of these include:

“You should have...”

“You need to...”

“Why didn’t you...?”

In a nutshell, attack the problem, never the customer.

***Avoid Criticizing the Customer’s Emotional State***

As a rule, you should never criticize or otherwise downplay the customer’s emotional state. Doing so will only raise their intensity even higher. You can remind the customer politely that you are trying to help, but lecturing irate customers about their behavior or personality will accomplish nothing.

In the majority of cases involving irate customers, they have every reason to believe they have been wronged. Ignoring that will work against you. Avoid making any comments about the customer’s

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

Call Escalation

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

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

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But, does empowerment mean that you should *never* escalate a call to someone else? It definitely does not.

Despite the fact that CSRs handle a multitude of different calls and customers each day, there is always the possibility a situation will arise that you are unfamiliar with or that you will get a call from a customer who demands to speak to someone else. Let's examine the first scenario – an unfamiliar situation. It may be a new situation or it may be one that is highly technical in nature. Either way, the worse thing you can do is guess at the answer or otherwise misinform or misdiagnose the caller's issue. Accept the fact that you will not always know the answer to every situation and don't be afraid to say, "I don't know." The key is, you should always follow that up with, "...but I'll find out."

When in these situations, however, you should always attempt to resolve the issue without escalating to another associate or to a supervisor. When you are confident that you have done everything you can, then by all means, reach out to someone for help. Your company may have escalation processes in place and you should follow those processes closely.

#### Call Escalation "warm transfer"

- Ask the customer's permission to
- put them on hold.
- With the customer on hold, call
- your supervisor (or talk directly if nearby).
- Fully explain the situation and give the customer's name to your supervisor.
- Go back to the customer and
- introduce him to your supervisor.
- Then release the call to your supervisor.

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Services not offered by you

- Network with other trades and in home service companies
- Develop an in home services referral list
- Use the list to help customers connect with reliable service providers
- Focus where you can help, not where you cant.

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## Section 2: Customer Follow Up

Moments of Truth

The phrase “moment of truth” was coined by Jan Carlzon of SAS Airlines.

A moment of truth occurs

whenever and wherever there’s a customer contact, because that is the moment when the customer forms a perception of the organization and it’s products or services.

The challenge for any company is to manage these moments of truth so that the perceptions are positive. The Customer satisfaction call gives you the opportunity to recover mistakes and save customers

Benchmarks

- Become familiar with the nature of each initial call
- Review the current status of each call prior to calling Discover your customers moment of truth regarding their experience with your Company
- Resolve unresolved issues
- Influence positive moments of truth

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If customer is unhappy ...

"Would you like our management to contact you to get a better understanding of your disappointment and try to resolve the problem? (Listen, record response and follow-up)

NOTES

Series of horizontal lines for taking notes.

**Section 3: Maintenance agreement**

**Scheduling process**

Maintenance agreements are typically scheduled when your company needs the work. Generally speaking, during the slowest months of the year. An effective strategy to keep technicians in front of customers is to determine how many calls are necessary each day to keep the schedule at least 80% full. Scheduling calls and close proximity of each other is very important as well. How closely calls are scheduled will determine how profitable and efficient team will be. The workspace that you used to make outbound calls should be quiet and without distractions. Be sure to block out the appropriate amount of time for you to focus on making outbound calls to your maintenance agreement customers. You might want to try to make calls at different times each day to determine when the optimal time to make outbound calls would be in your area.

Standards

- Set the appointment
- Establish an agenda
- Email pre-service pack
- E mail/text/tweet 48 hr. reminder
- E mail/text/tweet 24 hr. reminder
- Monitor call to final disposition







Can we get the owner's name and phone number?  
If caller objects, on a demand service call: "In lieu of an approved credit application from your landlord, I'm authorized to take your credit card information as payment. What type of credit card will you be using? The number? Expiration date? And the name on the card?" (Key In)

Continue - Type of System

"What type of (heating/cooling) system do you have?" If it's a system company does not work on - "I'm sorry (prospect's name), but we do not specialize in that type of (repair/installation). I would be glad to recommend another company if you want"

Continue - Age of Equipment

"Do you know the approximate age of the equipment?" (Key In)

Continue - Marketing

"For marketing purposes, may I ask how you heard of us?" If Yellow Pages or Internet: "Along with the (Yellow Pages/Internet) was there anything else?" (Key In)

Continue - Email Request

"We would like to send you a confirmation of this call by email? May I get your email address?" (Key In)

Continue

"Thank you for that (customer name). You're now in our system. How can I help you today?"

If Caller Is In System But With Past Due A/R

"(Customer name) I see your account is past due on previous work with us. I can take care of that for you. Would you like to use a credit card for payment?"

"Thanks for taking the time to help me straighten that out."

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If Caller Is In System But With Past Due A/R

"(Customer name) I see your account is past due on previous work with us. I can take care of that for you. Would you like to use a credit card for payment?"

"Thanks for taking the time to help me straighten that out."

If Caller Is In System - Normal Response

"Thank you for waiting (customer name). I see we do have you in our system. Is this for your property at (address)?"

"How can I help you today?"

Demand Service

VERIFY SYSTEM - EXISTING CUSTOMER

If records show multiple systems: "Our records show your home has multiple systems. Which one is giving you problems?" (Key In)

"Our records show you have a (gas furnace, heat pump, etc.) is that correct?" (Key In as needed)

EXISTING CUSTOMER WITH MAINTENANCE AGREEMENT

"(Name of Customer), I see you have a Maintenance Agreement with us. As you know, this entitles you to a (fill in %), with no overtime charges (dictated by company policy) and priority service."

EXISTING CUSTOMER COVERED BY WARRANTY OR EXTENDED WARRANTY

"(Name of Customer), I see the equipment is covered by a warranty. This gives you (identify what is covered under warranty). I will be sure to notify your technician"

(Create Ticket on System) "To be sure I've understood, I've recorded your problem as (repeat problem). Is this correct?(Key Problem Code)

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**When asked about hourly rate**

"One thing you'll be glad to know (customer's name), we do not charge by the hour. Instead we do a diagnostic analysis for only (\$....).

We'll go through your entire comfort system step-by-step to determine what's wrong and look for potential problems.

The technician will also look for anything that might affect the efficiency of your system and could be costing you money.

After the analysis the technician will review his findings with you and get your approval before any work is done. Does that sound OK?"

Why don't I schedule a technician to stop by and see what the problem is? I can schedule an appointment for your convenience.

**When asked the cost to replace a specific part**

"We find each service situation is unique as to what caused the particular problem. Without actually seeing your equipment, it's meaningless to give you a price for replacing a part over the phone.

Our technician will do a thorough diagnostic of your system for only (\$...) and then will explain your options."

"Why don't I schedule a technician to stop by and see what the problem is?

I can schedule an appointment for your convenience.

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## Demand Service troubleshooting

NOTES

### HEATING

#### THERMOSTAT

"Is the thermostat in the HEAT position with temperature set above room temperature?"

If Not:

"When you change the thermostat setting, does the unit begin heating?"

If unit begins to heat:

"That's great news. Looks like it won't be necessary to send out a technician"

That's great news. Looks like it won't be necessary to send out a technician."

"Well (customer name) looks like we need to schedule a technician out. I'll be happy to set that up for your."

#### COLD WEATHER

During extreme cold conditions, the heating unit may not be able to keep up with the demand.

It rarely happens, but during extreme cold weather, the natural gas utility may not be able to keep up with the demand as well. This more so in Southern climates.

#### REGISTERS

"Is warm air coming from the registers?"

"The closed registers are shutting off the supply of warm air. Why don't you see if this takes care of the problem. If not, give us another call and we'll schedule a technician to come out."

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## FILTER

"Do you know when the air filter was last changed?"

"I would recommend changing the filter. A clogged filter could be shutting off the supply of warm air to the house. Why don't you see if this takes care of the problem. If not, give us another call and we'll schedule a technician to come out."

## SCHEDULE CALL

"Well (customer name), looks like we need to schedule a technician out. I'll be happy to set that up for you." Move onto next phase of call to schedule

## Demand Service-troubleshooting COOLING

### THERMOSTAT

"Have you checked the thermostat to make sure it's set fo COOL and set on a temperature lower than the room temperature?"

If Not:

"When you changed the thermostat setting, did the unit come on and begin to cool?"

If system begins to cool:

"That's great news. Looks like it won't be necessary to send out a technician"

### INDOOR BLOWER

If thermostat was set correctly, but there is still no cooling...

"Is the indoor blower running

If the indoor blower is off...

"Have you checked the breaker going to the indoor unit or the electrical switch at unit?"

If either the breaker or disconnect switch were off and the system begins to cool...

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"That's great news. Looks like it won't be necessary to send out a technician."

If both switches to the indoor unit are already on, check to see if outdoor fan is operating.

#### OUTDOOR FAN

"One last check, is the fan running on the outdoor unit?"

If the outdoor fan is not running...

"Have you checked the disconnect at the outdoor unit and the breaker at the electrical panel to make sure they're on?"

If customer has not checked breaker...

"In case either is off, reset just once. If it trips again, leave it as is"

If the breaker was off and the system begins to cool...

"That's great news. Looks like it won't be necessary to send out a technician."

If the breaker was on or the breaker tripped...

"Well (customer name) looks like we need to schedule a technician out. It's best to turn the thermostat to the OFF position and wait for the service technician. Let's go ahead and schedule that call."

#### **Insufficient Cooling**

"There are a number of conditions that could be causing the problem. Is there ice on the refrigerant lines coming from the air conditioner outside?"

If yes...

"Sounds like you may have an ice build up at your indoor coil. Turn the thermostat to the OFF position; but leave the fan setting at ON so the blower continues to run. This helps thaw the unit so the technician can work on it immediately upon arrival."

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Otherwise...

"Well (customers name) we need to get a technician out to check out your system. I'll be glad to take care of that for you. "

**Water Dripping From Ceiling**

Is the indoor unit located close by the leak in the attic? Could you confirm if the water is dripping from the indoor unit?

"Well (customer name) looks like we need to schedule a technician out. I'll be happy to set that up for you. Be sure to turn the thermostat to the OFF position after we are finished talking."

**DEMAND SERVICE CALLBACK**

"If the problem is a result of our workmanship or a defective part, there is no charge for the visit (customer name). The technician will be able to determine if it's the same problem.

**DELAY**

Our technician is taking a little longer to complete his current call than we expected and is running about (approximate delay) behind. We will let you know just as soon as the tech is on his way."

**OTHER RESPONSES**

"Our technicians are trained to finish each call the first time. Occasionally it takes longer than expected to complete a repair."

"With fully stocked trucks, most jobs can be completed on the spot. Other companies may not be as well stocked as ours"

NOTES

Horizontal lines for taking notes.



**Other Tune-Up Benefits ...**

"Routine maintenance helps...

Extend the life of your heating & cooling equipment

Fix problems before they cause the inconvenience and expense of an emergency repair

Lowers monthly utility bills by improving system efficiency

Provide the maintenance required under your equipment warranty"

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**Ask For The Appointment ...**

"Can I schedule a precision tune-up for you?" (Go to script on setting tune up appointment.

**Customer follow up script**

**GREETING**

Good (Morning/Afternoon) Mr./Mrs./Ms. This is (CSR name) calling on behalf of (company name).

I'm calling to check on the (service/maintenance) we performed at your home on (date). We want to see if we reached our goal of 100% satisfaction.

The only way we can serve you better is to ask how we are doing."

**QUESTIONS**

"Was our Customer Service Representative helpful in setting your appointment?

Was the technician courteous?

Did the technician clean up everything after finishing his work?

Did the tech answer all of your questions or concerns?

On a scale of zero to 10, where 10 means extremely likely and zero means not at all, how likely is it that you would recommend (company name) to a friend or colleague?

**If rating is a 9 or 10.....**

"Thank you for that response, we appreciate that rating."

**If rating is a 7 or 8 ....**

"Thank you for that response. What would you say is the most important improvement we could make to get you to rate us closer to a 10?" (Listen and record response)

**If rating is 6 or below ...**

"What is the primary reason for the score you just gave?" (Listen and record response)

**If customer is unhappy ...**

"Would you like our management to contact you to get a better understanding of your disappointment and try to resolve the problem? (Listen, record response and follow-up)

**IF CUSTOMER INVESTED IN MAINTENANCE AGREEMENT**

If Customer Purchased Agreement in Conjunction With Call:

"I see that you invested in our Maintenance Agreement program. That's a sound investment, you'll be pleased with our continuing service. Do you have any questions about the Maintenance Agreement?"

**If Customer Already Had a Maintenance Agreement On A Service Call:**

"I see that you have one of our Maintenance Agreements and was able to save (...) on your recent service call. That's a sound investment on your part."

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### For Service Call Follow-ups:

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

(Listen)

Continue....

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



### Volume

Speak into the phone as if the customer was seated in front of you

- Speaking too softly makes your words hard to hear and understand and creates the impression you are unsure of yourself.
- Speaking too loudly causes the customer to think you are too harsh.
- Of course you need to speak louder than normal if the a customer asks you to.

### Tone

Your tone should be pleasant, natural, well modulated and confident

- Pleasant Voice - Answer the phone with a smile in your voice
- Natural Voice - Speak in a relaxed tone. Use straightforward language. Avoid terms that are too technical.
- Well Modulated Voice – Vary the pitch and intensity of your voice. An expressive voice captures the listener’s interest and attention.
- Confident - Be professional and sure of yourself.

### Voice evaluation exercise

The evaluation worksheet below is used to evaluate the overall quality of a CSR’s voice. It can be used to evaluate recordings of your phone conversations or with a study buddy.

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### Voice evaluation exercise

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



## Effective Listening

## NOTES

Listening is much more than hearing.

The goal of listening is understanding.

Effective listening requires empathy.

- Avoid prejudging the speaker
- Don't jump to conclusions
- Be aware of "emotional deafness"

Stay alert, we think 4 times faster than we speak

- Listen for content
- Listen for intentions
- Take notes
- Eliminate all possible distractions

After a person stops speaking

- pause before you speak
- Summarize what was just said, "If I understand correctly, you mean..."

Remember the customer's name

- Ask how it is spelled
- Write it down
- Use it several times
- Listening exercise

The evaluation worksheet on the next page is used to evaluate the overall effectiveness of a CSR's listening skills. It can be used to evaluate recordings of your phone conversations or with a study buddy to improve listening skills.

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

Effective communication: Always

- Always show empathy and interest
- Answer the phone by the second ring
- Avoid putting callers on hold, but if you must:
  - Ask caller's permission
  - Wait for caller to grant permission
  - Never leave on hold longer than a minute or two

: Never

- Shout, whisper, use slang or swear
- Take the call when laughing or talking to someone else
- Eat, drink or chew gum while answering the phone
- Be rude or angry with a customer
- Interrupt a customer
- Tune out a long-winded caller
- Talk negatively or badly about your company, associates or competition
- Talk about personal problems
- Promise something we can't deliver

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of the CSR. If the CSR is listening and allowing the customer to speak, the cause of the problem will surface and the call will be dispatched more accurately.

Examples of effective probing questions include:

“Is it cooling at all?”

“Is it blowing any air at all?”

“Is the thermostat set correctly?”

“Have you checked the breaker?”

“Have you changed the filters recently?”

Again, the objective is to gather information about the customer’s needs. Asking questions, of course, is the best way to get the answers you need to arrive at a diagnosis – the next step.

### ***Step 2 – Diagnose***

If you have done an effective job asking questions and gathering information in the first step, diagnosing the problem becomes a much easier task.

First of all, keep in mind that your diagnosis is, by design, general in nature. Because of the technical nature and complexity of some HVAC systems, it is difficult, if not impossible, to determine the *exact* problem over the phone. Your objective is to narrow the problem down as much as possible and let the technician take over from there. It is *important* that you let the customer know this.

Nothing will irritate a customer more than for you to tell them it is a “simple fix” and then to learn from the technician that the necessary repairs are extensive and costly.

If that is the case, why diagnose? It is important for you to diagnose because an accurate diagnosis on your part results in the accurate dispatching of the call to a technician. By narrowing down the

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problem, you allow the technician to make sure he/she has the right tools, parts, and equipment to effectively service the call. In fact, it is a good idea to inform the caller of this approach. For example, you might say, “Mr. Johnson, based on what you’ve described, I believe that you may have a problem with your condenser. Let me get a technician out there to take a closer look. He/she will inspect the equipment and recommend a solution to you.”

Once you have arrived at a diagnosis, it is a good idea to confirm with the customer that you are on the right track. For example, “Mr. Johnson, it sounds like your thermostat may be malfunctioning. Let’s schedule a technician to come out and take a look. Does that sound like a good solution to you?” This extra step may not be necessary in every case, but it is a good practice when you want or need confirmation that you are going after the right problem, and more importantly, that the customer feels your actions will resolve their issue.

Once your diagnosis is complete, you are ready to move to the next step.

**Step 3 – Act**

Your diagnosis is now complete and you are ready to take action. That action could possibly include a variety of things. For example, it could include one or more of the following:

- Booking the call.
- Entering a work order.
- Communicating with a dispatcher.
- Communicating with a technician.
- Communicating with a service manager.

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### **Step 4 – Please**

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

The first part of this step is to ask the customer if you have addressed their immediate problem fully. For example, you might say, “Mr. Johnson, once we have taken care of your problem with your air conditioner, do you think there are any other potential problems we need to look at? Or do you have any questions for me?” and then wait for a response. Listen intently to make sure you have resolved the issue fully and that you did not miss anything along the way.

Once the customer confirms that you have done so effectively, ask if there is anything else they might need. For example, you could respond with, “Great, is there anything else I can do for you today?” This is a good opportunity to capture cues that may lead to additional sales.

It may also present a good opportunity to introduce any promotions or new products your company may be attempting to bring to market, IAQ for example. You could introduce it by saying, “Mr. Johnson, did you know that our company can assess the quality of your indoor air for you? Is that something you might be interested in?” If the customer shows interest, lead the conversation towards an IAQ evaluation or other product if applicable. The bottom line is, listen intently to what the customer says – you never know when a sales opportunity will present itself!

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Next, if you have not already done so (some companies like to do this at the front end of the call), ask the customer how they came to call you. This is an effective way to check your marketing activities. Your supervisor or manager may ask you to track this somehow. It is an important component for the effectiveness of your company's marketing and advertising programs.

Once you have that information, take ownership of the customer's situation by personalizing the closing of the call and asking them to call you personally if they have any concerns. It is important that you do this however, without showing any concern that their issue will not be handled properly. For example, say, "Mr. Johnson, let me go ahead and give you my direct number in case you have any questions or need service in the future. Again, my name is \_\_\_\_\_, and my number here is (123) 456-7890." If your company has a particular procedure in place with regard to this, make sure you follow that procedure.

Finally, ask the customer to share their experience with others. You have already secured their satisfaction in step 4, so you know they have had a positive experience so far. Ask them to tell their family, friends, neighbors, and co-workers about you and your company. Customer referrals are one of the most effective ways to grow your business.

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## Section 2: Problem resolution practices

### Customer complaints

- Listen
- Empathize
- Apologize
- Isolate
- Fix
- Follow-up

### **Complaints are Opportunities**

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

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

A significant amount of research has been conducted on the subject of customer satisfaction. The Technical Assistance Research Program (TARP), a research organization that was established in 1971 at Harvard University, has done the most notable of this research.

According to TARP, 25% of customers are, at any given time upset enough with a business entity to stop doing business with them. Yet only 5% of these customers will ever voice their complaint.

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From a service company's point of view (like your company for example), you cannot fix what you do not know is broken.

This research also uncovered a very surprising finding with regard to complaints and customer loyalty. The research revealed that loyalty is actually *stronger* among customers who had a complaint with a company and had the complaint resolved in a professional and timely manner than it is among customers who never had a complaint in the first place. TARP listed the following as key points in support of this finding:

These customers stated that they know things can go wrong in any company.

These customers felt a stronger loyalty to the company because the company proved that they cared about them and valued them as customers.

These customers stated that they were more likely to purchase again.

The TARP data shows that complaints are a valuable component of customer relationships. It proves that quick and professional resolutions to complaints build stronger customer loyalty. As a result, we should always thank customers for bringing complaints to us. They allow us the *opportunity* to identify shortcomings, address and correct them, and in the long run, reduce or eliminate similar complaints in the future.

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**Listen**

These callers are typically emotional and often angry. First, listen carefully while allowing the caller to vent their feelings. In most cases, these callers just want to get things off their chests and want someone to hear them out. Here are some keys to accomplishing this effectively:

Don't interrupt. Let the customer have their say. You will have an opportunity to respond later.  
Don't match their aggression. Never argue with a customer; that is an argument you will never win. Stay calm and eventually, the customer will mirror your demeanor.

Don't question the customer. Not yet anyway. There may be a need to do that later, but initially, hear them out. You will know when they are done.

Don't take things personally. Remember that complaining customers typically know you are not responsible, but they do see you as a representative of the company. Remove yourself personally from the equation, regardless of how difficult that may be at times.

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## ***Apologize***

Next, apologize for the situation. This step is often difficult for some people. The key thing to remember here is that your apology is on behalf of your company. You know (and so does the customer by the way) that you may have had absolutely nothing to do with the situation that has prompted the complaint. But, as a representative, and in this case, spokesperson, of the company, it is critical that you present the apology. This simple act can diffuse the caller's anger and immediately builds a bridge between the two of you. It could be the start towards a lasting relationship.

Some possible apologies include the following:

***"I agree with you Mrs. Johnson; it should not have been handled that way. I am so sorry that it did and I am going to fix it for you."***

***"I want to apologize for this situation sir and I assure you I can help you."***

***"I am very sorry that wasn't done correctly. I'm going to do everything I can to take care of this for you."***

These statements are effective because they communicate a sincere apology and are followed by a positive statement that tells the caller that you are going to make things right.

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

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

### ***Follow-Up***

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

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customer know what to expect, and let them know that you intend to stay on top of it through the end. One more important point about your follow up – you must follow up both during and after the resolution to the complaint.

For example, if the solution calls for sending a technician back to the customer’s home, the follow up activity might be a phone call the day the technician is scheduled to arrive. You might call and say, for example, ***“Mrs. Johnson, I just wanted to follow up and remind you that our technician will be coming by this afternoon to resolve that problem with your furnace. Please call me if you have any questions.”***

Then, it is a good idea to call after an activity you directed, in this example, after the technician has performed the work. This follow up call might include something like this: ***“I just wanted to touch base with you again Mrs. Johnson. Was our technician able to take care of everything for you?”***

Again, the follow up is critical to closing the loop on the complaint. Additionally, it makes a clear statement to the customer that you care and that your company will go to any length to assure customer satisfaction.

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Irate customers

- Never blame the customer
- Avoid criticizing the customer's emotional state
- Focus on saving the customer, not the sale.

### **Dealing with Irate Customers**

If you have ever worked in a customer service role, you already know that it is inevitable that you will receive calls from irate customers. These callers are different from those with complaints, because the emotion they bring is highly elevated.

First and foremost, your approach should begin with the six-step strategy for resolving customer complaints from the last section. That process is a good core method that will guide you through the call. But, because of the emotionally charged disposition of the customer, there are additional special approaches that you can employ to effectively deal with these callers. They are:  
Never blame the customer.

Avoid criticizing the customer's emotional state.  
Focus on saving the customer, not the sale.  
Let's look at each of these approaches in more detail.

#### ***Never Blame the Customer***

At all costs, avoid placing any blame on the customer. The customer is already irate and on the defensive. Any comment that can in any way be interpreted as an accusation that the customer is at fault will only elevate the customer's emotions. Instead, focus on the problem.

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Another important element in this approach is avoiding “you” statements. No matter how diplomatically you phrase them, these phrases come across to the customer in a negative way.

Examples of these include:

“You should have...”

“You need to...”

“Why didn’t you...?”

In a nutshell, attack the problem, never the customer.

***Avoid Criticizing the Customer’s Emotional State***

As a rule, you should never criticize or otherwise downplay the customer’s emotional state. Doing so will only raise their intensity even higher.

You can remind the customer politely that you are trying to help, but lecturing irate customers about their behavior or personality will accomplish nothing.

In the majority of cases involving irate customers, they have every reason to believe they have been wronged. Ignoring that will work against you.

Avoid making any comments about the customer’s feelings other than the empathetic statements we reviewed in the previous section.

Avoid using words such as “over-reacting”, “blowing this out of proportion”, “not a big deal”, etc. The fact is, these customers feels justified in

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feeling the way they do and belittling them will only make them more difficult to deal with.

***Focus on Saving the Customer, Not the Sale***

We just learned that a quick and professional resolution strengthens the loyalty of a customer with a complaint. Another key component to this is the approach of “saving” the customer for the long term, not just the short-term sale that is currently at hand. Another way of looking at this is that focusing on the current sale is like winning the battle and losing the war.

As a consumer, how many times have you experienced something like this? You are at a restaurant and are dissatisfied with a meal. You ask the waiter to take it back and he refuses. The manager apologizes but insists that if you want a different meal, you will have to pay for it. This leaves you with two options: (1) Eat the meal you were served, or (2) Order another meal and pay for two. Either way, will you ever enter the doors of this restaurant again? Absolutely not!

A customer-focused restaurant manager (or even an empowered waiter for that matter) would have gladly taken the first meal back no questions asked, replaced it with another of your choice, and then (this is where the loyalty is built) picked up the tab! That is customer service at its best. Would you return to this restaurant? Absolutely! On top of that you will probably tell this story to your friends and colleagues and encourage them to dine there.

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Now, if the customer responds that it is OK, proceed and resolve. If not, you have done what you can; go ahead and escalate the call.

If and when you escalate calls, the best practice is to “warm transfer” the customer. A warm transfer involves the following steps:

- 1) Ask the customer’s permission to put them on hold. Say something like, ***“OK, Mr. Jamison, let me get my supervisor on the line. May I put you on hold for a second while I transfer you?”***
- 2) With the customer on hold, call your supervisor (or talk directly if nearby). Fully explain the situation and give the customer’s name to your supervisor.
- 3) Go back to the customer and introduce him to your supervisor. For example, you could say, ***“Mr. Jamison, I have Sally Jordan on the line. She is my supervisor and will help you from here.”***
- 4) Then release the call to your supervisor.

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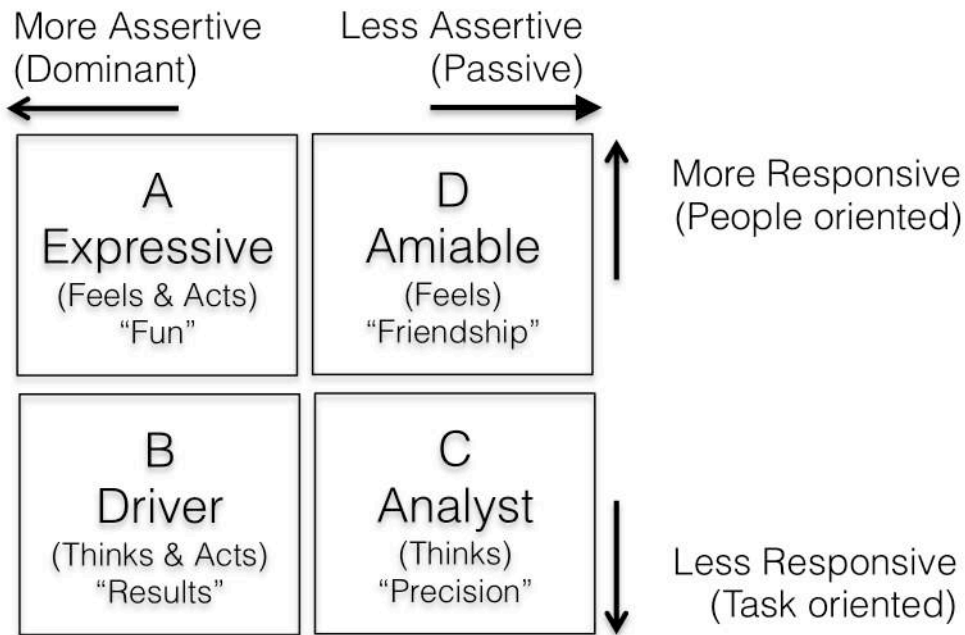
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### Section 3: Social styles

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

#### Driver

Are results-oriented and like to take the initiative.

They're

Seen as straightforward, quick to act.

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

### Expressive

Are perceived as aggressive, inspiring & emotional. Are

Comfortable taking the social initiative and rely on feelings

to help make decisions.

- Excitable, fun loving & talkative
- Enthusiastic
- Like an audience and recognition
- Often futuristic, creative & inspirational

### Analytical

Are deliberate, constrained and logical. Carefully weigh all alternatives in making decisions. Tend to let others take the social initiative.

- Seek structure, certainty and evidence before making decisions.
- Appear quiet and unassuming, may show little emotion.
- Remain guarded until a relationship has been developed.

### Amiable

Quiet, unassuming and supportive. Enjoy personal contact and Shared responsibility. Build relationships and seek support from others before they make decisions.

- Place a high priority on getting along
- Appear quiet & cooperative
- Easy to get to know
- Minimize Interpersonal conflict whenever possible

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Does this person:

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- Speak at the same rate and emphasis as me
- Prefer a pace similar to mine
- Focus more on facts or more on relationships
- Interrupt

**Adapting to Drivers**

- Be clear, specific and to the point
- Approach them in a straightforward and direct way
- Provide alternatives and choices for them to make their own decisions
- Present facts logically
- Ask specific questions

**Adapting to Expressive**

- Allow time to relate and socialize
- Support their intentions
- Provide fewer details and suggest ways to achieve their goals
- Provide ideas for implementing action
- Take enough time to discuss their ideas
- Avoid talking down

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Do some quick stretches at your workstation. Take a day or two of vacation to rest and re-energize. Time Wasters Poor time management can interfere with everything you do.

For CSRs, it limits the number of customers they are able to serve in a day.

It also influences the time they have available and need to fully handle customer concerns and problems.

Time management is a challenge for everyone every day, but it only improves (and becomes a habit) with concerted effort and regular practice.

To be successful, CSRs must control how they spend the hours they have on the job.

Developing effective organizational skills is one tool that can help add more time to our busy lives and ensure less stress on the job

The organizational skills you apply toward planning each day provide a framework for your productivity. More important, they direct the demands on your attention and give you a sense of control.

Prepare a monthly schedule. At the end of every month, make a schedule of events and significant deadlines for the next month.

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Manage your communications.

If you need to focus on a project and not be interrupted, let your voicemail become your secretary.

Return calls every two or three hours and keep a log of messages and their disposition so you do not have to rely on your memory to remember the details. You will instantly know if the task is completed or if there are still follow-up actions required.

A good sense of organization makes CSRs more efficient. If one of your main sources of stress is the sheer number of things that need to be done, getting organized should help you feel more in control.

Not being able to find important documents is a major time buster and stress inducer.

Not all stress is bad. There is such a thing as positive stress, which people every so often need. Positive stress is a force that motivates and energizes you rather than makes you anxious and frustrated; therefore, you can channel its energy into productive results.

For example, suppose you have been asked by your supervisor to train your peers in a customer service script that you developed for a new product. You might feel stress in the form of increased energy as you anticipate training others, but it is the positive kind because it propels you to do your best.

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In contrast, negative stress decreases productivity and comes from worrying about things you have no power to change.

How do you get rid of stress?

- Don't worry.

By recognizing that sometimes you worry about things you can do nothing about, it's easier to channel your worry into something productive

- Set goals.

Focus your energy in a positive direction instead of feeling defeated by negative self-talk.

- Finish unfinished business.

Make plans to complete an unfinished task or decide to drop it altogether, and stop causing yourself stress over it.

- Resolve conflicts. Apologize to a friend, family member, classmate, or co-worker that you've disagreed with. This is the kind of negative stress that can keep you up at night.

Manage your time more effectively

Learn how to set up boundaries

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