



Training Solutions, Delivered!

# EXCELLENCE IN CUSTOMER SERVICE

**Leader's Guide, Fact Sheet  
& Quiz**

**Item Number: 5231**  
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***This easy-to-use Leader's Guide is provided to assist in conducting a successful presentation.***

## **PREPARING FOR THE MEETING**

Here are a few suggestions for using this program:

- a) Review the contents of the Fact Sheet that immediately follows this page to familiarize yourself with the program topic and the training points discussed in the program. The Fact Sheet also includes a list of Program Objectives that details the information that participants should learn from watching the program.
- b) If required by your organization, make an attendance record to be signed by each participant to document the training to be conducted.
- c) Prepare the area and equipment to be used for the training. Make sure the watching environment is comfortable and free from outside distractions. Also, ensure that participants can see and hear the TV screen or computer monitor without obstructions.
- d) Make copies of the Review Quiz included at the end of this Leader's Guide to be completed by participants at the conclusion of the presentation. Be aware that the page containing the answers to the quiz comes before the quiz itself, which is on the final page.

## **CONDUCTING THE PRESENTATION**

- a) Begin the meeting by welcoming the participants. Introduce yourself and give each person an opportunity to become acquainted if there are new people joining the training session.
- b) Introduce the program by its title and explain to participants what they are expected to learn as stated in the Program Objectives of the Fact Sheet.
- c) Play the program without interruption. Upon completion, lead discussions about your organization's specific policies regarding the subject matter. Make sure to note any unique hazards associated with the program's topic that participants may encounter while performing their job duties at your facility.
- d) Hand out copies of the review quiz to all of the participants and make sure each one completes it before concluding the training session.

# 5231 EXCELLENCE IN CUSTOMER SERVICE FACT SHEET

**LENGTH: 8 MINUTES**

## **PROGRAM SYNOPSIS:**

Successful phone conversations can be a challenge. First impressions and helpful follow through are vital to keeping customers. This program contains useful phone tips with a quiz, positive phrases to use and reminders such as “limit the time a caller is on hold.” A proper example of a professional voicemail message is included. Being civil and professional on the phone ensures excellence in customer service!

Topics include useful phone tips when speaking with customers, phrases to use and avoid, and the best ways to communicate via voicemail, email and fax.

## **PROGRAM OBJECTIVES:**

After watching the program, the participant will be able to explain the following:

- Useful phone tips while speaking with customers;
- Phrases to use and avoid while dealing with customers;
- How to successfully communicate with customers via voicemail, email and fax.

## **INSTRUCTIONAL CONTENT:**

### **BACKGROUND**

- First impressions initiate the tone with which two will communicate. Speak slowly, clearly and cheerfully. Be engaged, focused and interested.

### **SPEAKING WITH CUSTOMERS ON THE PHONE**

- It's time to play the customer service game: useful phone tips.
- The following are 6 scenarios that may come up with speaking with customers. For each one is a few responses with one being the best to use.
- **Scenario 1:** A) Thank you for calling (dept). This is John. How may I help you? B) (Dept) This is John. How may I help you? C) (Dept) How may I help you? The best response to use in this scenario is A.
- **Scenario 2:** A) Use caller's name at least twice every call. B) If unsure of name, use sir or madam. C) Use the caller's name in every sentence. The best response to use in this scenario is A.
- **Scenario 3:** A) Listen attentively to the caller's questions or concerns. B) Interrupt when you have the answer to their question. C) Interject humor if they seem nervous while explaining. The best response to use in this scenario is A.
- **Scenario 4:** A) Be personable and witty by discussing current events. B) Use proper grammar and professional vocabulary. C) Use slang to make the caller more comfortable. The best response to use in this scenario is B.
- **Scenario 5:** A) Use phrases such as “yeah,” “uh huh” and “know what I mean?” B) Use common courtesies that you would appreciate. C) Use phrases such as “you're welcome,” “it's my pleasure.” The best responses to use in this scenario are B and C.
- **Scenario 6:** A) Avoid technical terms and revealing private procedures. B) Respond in a caring way and apologize when necessary. C) Show enthusiasm, adaptability and empathy to caller. The best responses to use in this scenario are A, B and C.

### **WHAT TO SAY AND NOT TO SAY**

- We've all be in a situation where we're not quite sure what to say to a customer or sometimes say the wrong thing.
- There are 5 forbidden phrases and 5 positive phrases that you should try to avoid and use, respectively, while speaking with customers.
- The 5 forbidden phrases to avoid are: “I don't know;” “We can't do that;” “You'll have to;” “Just a second; and No.”
- The 5 positive phrases to use are: “That's a good question;” “What I can do for you is...;” “May I suggest...;” “I will gladly research;” and “Unfortunately (at this time).”

### **THINGS TO KEEP IN MIND – WHILE ON THE PHONE**

- **Avoid unnecessary silence.** Let the caller know what you were doing to assist them. Educate the caller and how their inquiry is handled. Limit silence to less than 10 seconds. Remind them it is your pleasure to resolve.
- **Limit time a caller is on hold.** Ask the caller's permission to put them on hold. Await their response before pressing hold. Inform caller of progress after every 10 to 30 seconds. Always thank the caller for holding when you return.
- **Keep your word with the caller.** Provide accurate first call resolution or refer the caller to the appropriate department. Follow up as agreed; remember keeping your word strengthens trust.

- **Concluding the call.** Have a smile in your voice. Reflect that you were happy to be of assistance. Ask “Is there anything else I can help you with today?” and always “Thank you for calling.”
- Customer service is truly an art. It reflects the heart of the business.

#### **THINGS TO KEEP IN MIND – LEAVING A VOICEMAIL, FAXES & EMAILS**

- Think of a voicemail as an impression you want to convey to your customers as well as your coworkers.
- If your phone system allows, create a special message for each group.
- For example, your voicemail message for coworkers should inform if you're in your office and the best time and way to reach you. Time is valuable for both you and your coworkers.
- Your voicemail message for customers should be standard and brief. “Welcome, Department title, email address, fax number, thank you.”
- “Hello this is John Smith in Communications. I am briefly away from my desk. You may send a fax to 415-555-5555 or send an email to JSMITH@acme.com or you may leave a message. I'll return your call shortly. Thank you for calling.”
- Treat fax and email messages as official business correspondence. Be brief, polite and specific.
- Define action requested or completed; don't write what shouldn't be repeated.
- Keep email and fax message to the point and consider who is copied. Keep message to three or four lines. Use spell check and simple terms. Use discretion when copying to others.
- Do not engage in debates and always mail confidential materials. Always be civil and professional. Use the phone to discuss differences. Never editorialize or vent in print.
- These tips will ensure excellence in customer service!

**EXCELLENCE IN CUSTOMER SERVICE**

**ANSWERS TO THE REVIEW QUIZ**

1. a

2. b

3. e

4. a

5. b

6. e

7. b

8. a

**EXCELLENCE IN CUSTOMER SERVICE**  
**REVIEW QUIZ**

*The following questions are provided to determine how well you understand the information presented in this program.*

Name \_\_\_\_\_ Date \_\_\_\_\_

1. First impressions initiate the tone with which two will communicate.
  - a. True
  - b. False
  
2. Using the caller's name in every sentence is best when speaking on the phone.
  - a. True
  - b. False
  
3. Which of the following is one of the 5 positive phrases to use while speaking with a customer?
  - a. That's a good question
  - b. May I suggest...
  - c. What I can do for you is...
  - d. Unfortunately (at this time)
  - e. All of the above
  
4. It's best to limit silence to less than 10 seconds when on the phone with a customer.
  - a. True
  - b. False
  
5. It is okay to put the customer on hold without letting them know.
  - a. True
  - b. False
  
6. When concluding a call, you should always \_\_\_\_\_.
  - a. Have a smile in your voice
  - b. Say that you were happy to be of assistance
  - c. Ask if there "Is anything else you can help with today?"
  - d. Always say "Thank you for calling."
  - e. All of the above
  
7. Voicemails should be long and contain a lot of information.
  - a. True
  - b. False
  
8. Customer service is truly an art.
  - a. True
  - b. False