Telephone Skills
Delegate Manual - SAMPLE PAGES
WORKSHOP OUTLINE

9.00 Setting the Scene
Knowledge/Skill Checklist
Ice Breaker: Getting to Know You

Communication Overview
Benefits and Barriers to Communicating
Personal Communication Style Questionnaire

11.00 BREAK

11.15 Dos and Don’ts of Effective Telephone Work

Importance of the Voice
The 4 P’s of Voice

12.45 LUNCH

1.30 6 Steps to Handling an Incoming Call
Questioning Skills
Listening Skills

Handling Incoming Calls: How Good am I?

3.00 BREAK

3.15 Telephone Role Plays
3 Steps to Assertive Behaviour
Dealing with Irate Callers

Competitive Recap Quiz

Summary of the Day
Action Planning

5.00 CLOSE

“The average man finds life very uninteresting as it is. And I think that the reason why, is that he is always waiting for something to happen to him instead of setting to work to make things happen.”

AA MILNE
KNOWLEDGE / SKILL CHECKLIST

In order to ensure that learning objectives are met by the course:

**BEFORE THE COURSE:** Rate your ability on a competence scale of 1-5 as follows: -

1= No knowledge/skill
2= A little knowledge/skill but considerable development required
3= Some knowledge/skill but development required
4= Good level of knowledge/skill displayed, with a little development required
5= Highly competent – no/very little development required

**WRITE** your numerical rating in the 1st column.

**AFTER THE COURSE:** Repeat the exercise, writing your new rating, in the 2nd column.

<table>
<thead>
<tr>
<th>COMPETENCE</th>
<th>PRE. (1-5)</th>
<th>POST (1-5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Can define the meaning of ‘communication’</td>
<td></td>
<td></td>
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<tr>
<td>2. Understands where communication goes wrong in business</td>
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<tr>
<td>3. Can describe a range of good and poor telephone handling traits</td>
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<td>4. Understands the range of voice factors that affects communication</td>
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<td>5. Asks effective open questions during a call</td>
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<td>6. Understands the behaviours associated with active listening</td>
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<tr>
<td>7. Handles an incoming telephone call in a structured way</td>
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<tr>
<td>8. Is an effective listener</td>
<td></td>
<td></td>
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<tr>
<td>9. Understands the meaning of the word ‘assertive’</td>
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<tr>
<td>10. Is assertive with others, utilising a 3 step technique</td>
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<tr>
<td>11. Knows how to defuse a potentially aggressive situation</td>
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<tr>
<td>12. Confidently deals with challenging Callers</td>
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</tbody>
</table>

**OVERALL COMPETENCE**

**PERCENTAGE CHANGE** (2nd column total minus 1st; divide answer by 1st column total; Multiply answer by 100): %

"A satisfied customer—we should have him stuffed."

**BASIL FAWLTY**
WHERE COMMUNICATION GOES WRONG

The way we communicate to others in business sometimes breaks down. In small groups, consider the way you, your colleagues and line managers communicate in your organisation. What goes wrong? It might be useful to think of examples too. Record your findings below:

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•
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•
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“People are always blaming their circumstances for what they are. I don’t believe in circumstances. The people who get on in this world are the people who get up and look for the circumstances they want, and, if they can’t find them, make them.”

GEORGE BERNARD SHAW
COMMUNICATION METHODS

There is a range of ways that we communicate information at work:

- Face to face (1-1 or group)
- E mail
- Written messages e.g. answering a phone for someone
- Internet
- Meetings
- Presentations
- Telephone
- Voice mail
- Memos and Letters
- Faxes
- Reports
- Video conferencing
- Company newsletter

The method we choose can depend on:

- **WHAT** we need to communicate?
- **WHO** it needs to be communicated to?
- **WHY** do they need the information?
- **WHERE** are they based?
- By **WHEN** do they need the communication?
- **HOW** much feedback is required about the message?
- **HOW** emotive is the topic? (The more emotive to sender or receiver, the more we should go face-to-face)
- **HOW** did they react/respond last time? (E.g. if they ignored your email request for information last time, you may want to pick up the phone this time)
- **WHAT** are the company guidelines on which method to choose?

"Good communication is characterised by providing employees with information which they want and getting information to them quickly and through the channels they prefer."

**LOUIS I. GELFAND**
# TELEPHONE SKILLS – SELF DIAGNOSTIC

*Answer the following questions to see how professional you are on the telephone.*

<table>
<thead>
<tr>
<th>Do you...</th>
<th>Yes</th>
<th>No</th>
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</thead>
<tbody>
<tr>
<td>1. Answer the telephone promptly – within three rings if possible?</td>
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<tr>
<td>2. Smile as you pick up the receiver?</td>
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<tr>
<td>3. Speak slowly and clearly?</td>
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<tr>
<td>4. Start the call by identifying your organisation or dept and your own name to the caller?</td>
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<tr>
<td>5. Ask open questions to find out what the caller wants?</td>
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<td>6. Listen and resist the temptation to interrupt?</td>
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<tr>
<td>7. Make notes and read back the key points so that you have a record of the call and the caller knows that you are listening?</td>
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<tr>
<td>8. Try to be helpful and volunteer information?</td>
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<tr>
<td>9. Warn callers first if you need to put them on hold or transfer them to someone else?</td>
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<tr>
<td>10. Finish the conversation by re-capping on exactly what you are going to do as a result of the conversation?</td>
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<tr>
<td>11. Give your name in case the caller needs to speak to you again?</td>
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<tr>
<td>12. You use the caller’s name, rather than Sir/Madam?</td>
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<td></td>
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<tr>
<td>13. Speak with confidence (as you have taken time to learn about your products and procedures)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Courteous and polite</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Avoid using jargon with customers</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

“Attitudes are contagious. Are yours worth catching?”

ANON
THE FACTORS OF THE VOICE

Power
• Too loud, too quiet? Or is it just right? Ask a colleague to check it with you.
• Quiet is often associated with a lack of assertion; loud is associated with aggression and dominance.

Pitch
• Not too high/too low...rich warm medium/low pitch with some variance for interest.
• Don’t forget to smile - it lifts the tone.

Pronunciation
• Ensure you are sounding word endings, and not slurring the words.

Pace
• When under pressure we tend to quicken our voice speed.
• Slow your voice down. Face-to-face, we partially lip read and look for facial expressions to help us interpret what the other person is saying. Impossible to do with the phone.
• The ideal pace is 120/130 words per minute (2 or 3 words per second), at least for the first minute so they can acclimatise themselves to your voice. After that try to match your pace to the other person. It can make them more comfortable with you.

Try Using:

Inflection/Emphasis
• The verbal underlining of certain words to add interest or importance.
• Try slowing down/speeding up your delivery or by speaking at higher or lower volumes.
6 STEPS TO HANDLING AN INCOMING CALL

1. P

2. A

3. R

4. S

5. A

6. C

“Everything I practice the luckier I get.”

GARY PLAYER
LISTENING SKILLS QUESTIONNAIRE

Scoring

Score 2 points for each question you answered with YES

<table>
<thead>
<tr>
<th>Score</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-5</td>
<td>You concentrate hard when listening and engaging in conversation</td>
</tr>
<tr>
<td>6-11</td>
<td>Your concentration span is above average but you could become a more effective listener with little effort</td>
</tr>
<tr>
<td>12-17</td>
<td>Concentrating on listening to what other people say to you is not your best talent. If it is any consolation, most people fall into this category</td>
</tr>
<tr>
<td>18-20</td>
<td>You stand to gain most from this section. Please turn off your personal stereo and pay attention from now on</td>
</tr>
<tr>
<td>20+</td>
<td>Not only do you find it impossible to listen to simple instructions, you also have difficulty with reading and basic arithmetic. A no hoper.</td>
</tr>
</tbody>
</table>

“We have two ears, one mouth that we may listen the more and talk the less.”

ZENO
LISTENING SKILLS

• Concentrate - shut off all the physical distracters like the phone and interruptions, and the mental ones - day dreaming, thinking about other tasks

• Evaluating what is said. We speak much more slowly than we think, so the active listener has plenty of time to think about what is said:
  - Why did she say that?
  - What does that mean exactly?
  - Does that make sense?
  - Is there any evidence for that statement?

• Evaluating what is not said. The active listener looks at the space between words - hesitation, confusion, and embarrassment - and to non-verbal communication or body language.

• Acknowledging - ‘yeahs’ or ‘really?’ and being assertive: “Thanks for that / I understand what you’re saying.”

• Summarising - “Now let me get this right, what you’re saying is ……”

• No interruptions - finishing sentences off for people because you think you know what they are going to say

• Body language:
  - Leaning forward shows that you are interested in what they are saying
  - Eye Contact
  - Nod in agreement
  - No fidgeting
  - Smiling
  - Raised eyebrows.

• Take notes

“Men of few words are the best.”
WILLIAM SHAKESPEARE
<table>
<thead>
<tr>
<th>ACTION</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Concentrates on what CAN be done for the customer by way of any solution/recommendation</strong></td>
<td>Offers no real solution leaving customer frustrated</td>
<td>Offers solutions – yet tends to do it ‘matter of factly’, without emphasising benefits Or uses the phrase “all I can do is...”</td>
<td>Explains fully what can be done, or what is being actioned</td>
<td>Customer is offered choices/alternatives Makes the customer feel ‘special’ “This will benefit you by...” Build confidence – “this rarely happens”</td>
</tr>
<tr>
<td><strong>Jargon free</strong></td>
<td>Used terms/references unfamiliar to customer</td>
<td>Used unfamiliar terms/references &amp; then explained what they meant</td>
<td>No jargon used</td>
<td>Uses the same descriptions/terms the customer used</td>
</tr>
<tr>
<td><strong>Time-scales given are realistic</strong></td>
<td>None/incorrect timescale given</td>
<td>Timescale given – unsure</td>
<td>Correct timescale given</td>
<td>Confident, enthusiastic &amp; positive when giving timescales</td>
</tr>
<tr>
<td>(CLOSE)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Briefly – summarises call/confirms any actions</strong></td>
<td>Does not summarise call</td>
<td>Partially summarises call</td>
<td>Summaries call</td>
<td>Summarises call/actions clearly &amp; concisely</td>
</tr>
<tr>
<td><strong>Asks “is there anything else I can help you with?” &amp; “thank you for calling”</strong></td>
<td>Did not demonstrate any part of the closing salutation</td>
<td>Demonstrated in part the closing salutation</td>
<td>Demonstrated closing salutation in full</td>
<td>Demonstrated closing salutation in full, up-beat, uses the customers name</td>
</tr>
<tr>
<td><strong>VOICE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Pace</strong></td>
<td>Extremely slow/fast</td>
<td>A little slow/fast</td>
<td>About right</td>
<td>About right. Pauses at times to allow listener “to catch up”.Varies pace.</td>
</tr>
<tr>
<td><strong>Power</strong></td>
<td>Extremely soft/loud</td>
<td>A little too soft/loud</td>
<td>About right</td>
<td>About right but varies the power to add interest</td>
</tr>
</tbody>
</table>
ROLE PLAY: CALLER PREPARATION SHEET

Play the part of a ‘typical’ Caller for the Call Handler to deal with. You could be an external customer or an internal colleague from another department. You have a problem or issue that the Call Handler needs to resolve for you.

A couple of points about the situation you invent and your manner on the phone ….

- Create a realistic situation that you know is ‘typical’ of the calls they have to handle.

- Try to invent a problem or issue that requires more than a one-word answer from the Handler. For example:
  - A complaint that you have that requires you to explain something that’s happened over a period of a few weeks.
  - An issue that may have more than one solution, so that the Call Handler needs to agree a plan of action.

- **REALLY IMPORTANT**: Respond to the Caller’s questions exactly as they are asked. So if they ask a closed question, only offer a yes or no answer – do not be helpful in offering information that has not been asked for.

If one person says that you are a horse, smile at them.
If two people say that you are a horse, give it some thought.
If three people say you are a horse, go out and buy a saddle.

PROVERB
ASSERTIVENESS, AGGRESSIVENESS AND PASSIVITY

Assertiveness is all about ......

• Being honest about yourself and others
• Being confident
• Trying to find solutions
• Listening to and understanding the other point of view
• Expressing what you want, need or feel but not at the expense of others

Quotes from assertive people
- “I’d like to tackle the task in this way. How does that affect you?”
- “I know we’re really under pressure at the moment. However I’ve worked every Saturday for the last 3 weeks, so I want this weekend off.”
- “I understand what you are saying, however I’ve got to go. Can we tackle the problem in the morning.”

Aggressiveness is all about ......

• Getting your own way (at the expense of others)
• Making sure you come out the winner
• Not listening to others
• Giving no consideration to others

Quotes from aggressive people
- “Just do it.”
- “I don’t agree with you.”
- “That’s stupid.”
- “Surely you don’t believe that.”
- “It’s your turn to get the coffees in.”
- “It’s a load of rubbish – typical of the scheduling department – they haven’t got a clue.”
- “I’d like it done by 2.30.” (mildly aggressive)

“We cannot direct the wind, but we can adjust the sails.”

ANON
**ASSERTIVE SKILL PRACTICE**

Using the 3 steps to assertive behaviour, write assertive responses to these scenarios:

<table>
<thead>
<tr>
<th>SCENARIO</th>
<th>ASSERTIVE RESPONSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A colleague phones you and says: “I have been waiting a week now for that report you were doing. Can't you cope with your workload?”</td>
<td></td>
</tr>
<tr>
<td>2. John is a very irate caller who was promised a phone call from us last week. You respond:</td>
<td></td>
</tr>
<tr>
<td>3. A colleague phones you to ask for your computer password as he's forgotten his. You feel uncomfortable about doing this. You respond:</td>
<td></td>
</tr>
<tr>
<td>4. A Caller rings in to say that he has been trying to get hold of Andrew Barnes for about a week now. He keeps leaving messages for him to ring back but still no response. You respond:</td>
<td></td>
</tr>
</tbody>
</table>

“I see myself hitting all the routines, doing everything perfectly. I imagine all the moves and go through them in my mind.”

MARY LOU RENTON (Olympic Gold Medallist 1984)
DEALING WITH ANGER

People Get Angry Because...

- Procedures not being completely implemented.
- Lost paperwork.
- Paperwork not being completed or completed incorrectly.
- Miscommunication or unnecessary communication.
- Missed deadlines.
- People being stressed – either customers/clients being ratty or miserable; staff and managers under pressure to get things done.
- Inflexibility in procedures (or people).

And frequently

- Vote with their feet
- Don’t confront the situation
- Tell other people of their experience

Why are they angry?
People rarely get angry for any reason at all, it’s when dissatisfaction is poorly managed they become angry.

Is the anger directed at you?
Although an angry person will attack you, remember that you are listening to someone who is in an ‘attacking mode’

"On two occasions you should learn to keep your mouth shut – when swimming and when angry."

ANON
ACTION PLANNING SHEET

Think about the skills we have covered today. What exactly would you like to do differently as a result of the workshop? The changes you suggest don’t have to be life changing – they could be very simple, quick things that you will change about the way you use the telephone.

1.

2.

3.

4.

“Training that brings about no change is as effective as a parachute that opens on the first bounce.”

ANON