

# How to Survive (& Thrive) in a CALL CENTRE

## INSTRUCTOR GUIDE



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This instructor guide accompanies the book *How to Survive (& Thrive) in a Call Centre*. While the book is intended for anyone applying to or already working in a call centre, the guide is intended for those using the book to train call centre agents. The guide takes the trainer through the book, chapter by chapter, showing you what you can expect each chapter to achieve for your trainees. Throughout the guide, there are page references to the book (simply given as p.XX) and to the Appendix of the guide (given as App. X, p.XX), which contains 25 Worksheets for use in class.

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# Introduction



The book *How to Survive (& Thrive) in a Call Centre* teaches agents to:

- ♦ Contribute to the call centre's success
- ♦ Provide outstanding customer service
- ♦ Increase sales results
- ♦ Improve their overall performance and excel in all areas of the role
- ♦ Enjoy sustained energy and motivation
- ♦ Reduce their stress levels
- ♦ Manage and advance their careers

*How to Survive (& Thrive) in a Call Centre* is divided into three sections.

**Part I: Getting the Job.** Providing a glimpse into the industry, terminology and application process, Part I of the book is written for people considering call centre work. The materials in this Instructor Guide for Part I are **ideal for instructors of call centre pre-employment courses**. Some explanations and activities also provide good background information for newly hired agents so could be used in induction training by call centre trainers, team leaders and managers.

**Part II: Keeping the Job.** Part II is the essence of the book and its course. It teaches the skills and knowledge necessary to become a successful call centre agent. The materials in this section of the Instructor Guide are **ideal for call centre trainers, team leaders and managers who train induction groups**. In addition the materials could be used to revise or increase the skills of existing agents in either formal training sessions or in team meetings. This section is also suitable for instructors of call centre pre-employment courses.

**Part III: Moving Up or Moving On.** Part III of the book teaches call centre agents how to manage their careers. The materials in Part III of this Instructor Guide are **ideal for all call centre instructors**.

Part I

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# GETTING THE JOB







# Types of Jobs in Call Centres



## Chapter Overview

Chapter 1 covers the different types of call centre roles. We discuss types of *inbound* and *outbound* call centre agent positions as well as higher level personnel. Higher positions discussed include those of team leader, scheduling specialist, quality specialist, campaign co-ordinator, call centre trainer, supervisor and manager.

## Chapter Objectives

By the end of this chapter, students should be able to:

- Differentiate between inbound and outbound call centre agents
- Identify roles and responsibilities of higher level positions
- Articulate to whom the members of each position report

## Key Terms and Topics

### Chapter Introduction

- “Although call centres are relatively flat structures—that is, most employees are on the same level—there are a number of higher level positions in supervisory, training and management roles” (p. 9)

#### *Discussion questions for class:*

How does one get started in a call centre? What positions are available to enter the industry?

### Entering a call centre

- The entry level position is agent (p. 9). “Agent roles involve the use of product and **customer relationship management databases (CRM)** including adding new customers to the database and modifying customer records. In addition the role involves the use of the call centre phone system such as putting the customer on hold and successfully transferring calls” (p. 10).
- There are jobs for inbound (taking calls) and outbound (making calls) roles, and sales and/or customer services or technical support may be involved (p. 9).
- Inbound roles can involve customer service and inbound sales for existing and prospective customers, from a variety of messaging channels, including phone calls, emails, and possibly instant messaging/web chat, letters and faxes (p. 10).
- Outbound roles include warm and cold calls. Warm calls involve calling “a customer who already has a relationship with the organisation” for additional sales. Cold calls involve “calling people who usually have no relationship to the organisation” (p. 11).

#### *Discussion question for class:*

What are the opportunities for advancement? What are the higher level roles in a call centre?

## Higher level call centre roles

- ♦ Agents can progress to team leader, senior agent, or training as a scheduling specialist or call centre trainer (p. 12).

### Roles

- ♦ Team leader: supervises 10-15 agents, is responsible for escalated customer calls, reports to the call centre supervisor or manager (p. 12).
- ♦ Workforce Management/Scheduling Specialist: responsible for call centre staff scheduling, works with rostering software, and reports to a supervisor, quality manager or call centre manager (p. 13).
- ♦ Training officer: responsible for all aspects of call centre training, including that of new agents and existing staff. Reports to training manager, supervisor or call centre manager (p. 13).
- ♦ Supervisor: leads team leaders, scheduling specialist, and training officer to achieve business goals, supports the call centre manager role, reports to call centre manager (p. 13).
- ♦ Campaign Co-ordinator: campaign project management, works with other departments, reports to supervisor or call centre manager (p. 13).
- ♦ Quality Specialist: designs call coaching programmes, coaches and monitors quality of email responses and data entry, may offer input for organisational improvements, reports to quality manager, supervisor or call centre manager (p. 14).
- ♦ Call Centre Manager: implements organisational strategies, manages operations, budget and targets, manages team leaders, trainers, and specialists, reports to senior manager, often a board member (p. 14).
- ♦ Call Centre Director: receives reports from call centre managers (p. 14).

<p><b>Experiential Exercises or Assessments</b></p>	<p><b>Call Centre Roles—Card Activity</b></p> <ul style="list-style-type: none"> <li>• Print the cards for each call centre role (App. 1, p. 133). Be sure to have enough cards for each student. Print the number of cards for each position to reflect the call centre organisation, i.e. only one director and several agent cards. Pass out one card per student.</li> <li>• Have students mingle and ask each other the following questions: 1) what are your responsibilities? 2) who do you report to? For higher level positions, also ask 3) can an agent progress to that position? After a couple of rounds of this, have students trade cards so that everyone has a new role. Repeat the mingling exercise. Repeat the card switching one more time so that all students have practice with 3 roles each.</li> </ul>
<p><b>Creative Instructor Notes</b></p>	<p>You might get students to think more about these roles by having them write about which role they'd most like to have and which they'd least like to have, and why. Then, have them discuss their writings in groups of three to four. It will be good for them to hear alternative perspectives both on jobs they didn't themselves choose and on jobs they did choose.</p>
<p><b>Homework</b></p>	<p>Options for homework might include:</p> <ul style="list-style-type: none"> <li>• Develop a visual “map” of the positions reflecting who reports to whom.</li> <li>• Discuss with a partner why they would want to work in a call centre and report the results of this discussion in a short paper.</li> </ul>
<p><b>Takeaway Message</b></p>	<p>There are many possible positions within a call centre. Each has its own specific role and each is vital to the functioning of the organization as a whole.</p>

## Test Bank

1. Which of the following is an example of an outbound call?
  - A. Providing internet chat service to a prospective customer.
  - B. Contacting a current customer to inform them of a promotion.**
  - C. Assisting a caller who is asking about a promotion seen on TV.
  - D. None of the above.
  
2. When you call someone who has no previous relationship to the organisation, this is a/an:
  - A. Warm call.
  - B. Cold call.**
  - C. Inbound call.
  - D. None of the above.
  
3. A training officer reports to whom?
  - A. Training manager.
  - B. Supervisor.
  - C. Call Centre Manager.
  - D. All of the above.**
  
4. An escalated customer interaction is handled by whom?
  - A. Agent.
  - B. Supervisor.
  - C. Campaign Co-ordinator.
  - D. Team Leader.**
  
5. Which of the following is not generally part of the agent's job?
  - A. Adding new customers to the database.
  - B. Modifying customer records.
  - C. Providing technical support.
  - D. All are part of the agent's job.**

# Looking for Call Centre Work



## Chapter Overview

Many types of organisation use call centres (p. 15). Several are listed here. These include the industries of computers, education/training, finance, insurance, telecommunication, and tourism, to name only a few (pp. 15-16).

This chapter discusses the recruiting used by call centres, the skills and experience required for call centre work, call centre objectives, and the job application procedure and employment considerations.

## Chapter Objectives

By the end of the chapter, successful students will be able to:

- Identify where to look for call centre employment.
- Articulate the skills and experience required for call centre employment.
- Identify the objectives of a call centre.
- Articulate the process of call centre application.

## Key Terms and Topics

### Chapter Introduction

“Organisations in the following industries often have call centres. In addition to this list, there are many more organisations offering call centre work” (p. 15). This list is quite extensive. Please use the list from the book’s text.

“Such organisations normally advertise positions via recruitment websites or via employment agencies (who, in turn, often advertise on recruitment websites). Some but not all employers also advertise positions in major local newspapers” (p. 16).

#### *Discussion question*

Where would you look for a job in a call centre?

### Employment agencies

Employment agencies can be a great source for seeking call centre positions, as call centres use these agencies frequently (p. 16).

#### *Discussion question*

What sort of skills and experience are call centres looking for in their employees?

### Required skills and experience

Skills in the following areas are necessary for call centre employment: customer service, communication, sales, interpersonal relationships, computer and typing skills, literacy and numeracy, stress management, and reliability and job dedication (p. 17).

Employers need to ensure you have these skills. They do this through the application process, which includes assessment centre exercises, psychometric ‘personality’ testing, interviews, and referee checks. Computing skills are assessed via written application and email assessments, and customer service and sales skills are assessed throughout the application process. Role plays, email tasks and other assessment tools are used (p. 18).

*Discussion question*

What role does a call centre play within an organisation?

**Call centre objectives**

Call centre roles within organisations may differ according to the organisation. The role of the call centre you are applying to is something you will want to find out when applying (see p. 19 for a list of call centre roles). About half of all call centres focus on customer service, while another third are sales and service call centres (p. 19).

*Discussion question*

What does the job application process involve?

**Job application process**

The application process to a call centre involves several steps, and different call centres may or may not use them all. In addition to assessing your written application materials, the process may involve a phone interview, assessment centre attendance, face-to-face interview, reference checking, criminal record check, and finally a job offer via telephone or a letter rejecting your application (p. 20).

- ♦ Your first step in the application process is to submit a written application via a resume/CV and cover letter. Your application materials are very important as they are used as assessment tools of your skills and abilities in many ways. Page 21 of the book offers a list of tips to keep in mind when drafting your application materials, including attention to matters such as font selection and word choices.
- ♦ An assessment centre tests several applicants simultaneously, and are often used in call centre recruiting. You will likely be expected to:
  1. Introduce yourself in a short presentation (p. 22);
  2. Conduct a role play of customer service (p. 23);



3. Participate in a group discussion given a topic or a problem to solve (p. 23);
  4. Provide an email test (p. 24);
  5. Provide a typing test (p. 25);
  6. Take a psychometric test (p. 26);
  7. Give a short interview (p. 27).
- Behavioural interviews are common in the recruitment process. These questions are designed to assess how you would behave in certain situations and often begin with “Tell me about a time when you...” and “Tell me about a situation where...” (p. 27). The best way to answer these questions is using the STAR approach: Situation or Task, Action, Result (p. 28).
  - References are often checked, so they must be genuine. Be sure to ask your referees for permission to use their name before doing so (pp. 29-30).
  - It is important that you are available for contact in case the employer wants to offer you a job. It is unlikely that an employer will call several times or otherwise try to track you down, so make sure you are available (p. 30).

### *Discussion question*

Before deciding you want a job within a particular call centre, what are some things you should think about?

### **Additional considerations**

- Do some research on the company before attending an interview, not only to give a good impression of having done your homework, but also to ensure you want to work there (p. 31).
- Ensure the hours are acceptable to you. Many call centres operate during non-business hours (p. 32).
- Consider the location and your commute (p. 33).
- Consider how much training you will be provided with (p. 33).

<p><b>Experiential Exercises or Assessments</b></p>	<ul style="list-style-type: none"> <li>• Have students take a moment to note what they personally need to gather for their application materials. In groups of 3-4, have students discuss ideal ways to demonstrate their proficiency in the following during an interview: customer service, communication, sales, interpersonal relations, computer and typing skills, literacy and numeracy, stress management, and reliability and job dedication. Students should actually articulate (for each other) how they have these skills.</li> <li>• Students create a short introduction presentation about themselves that they could use at an assessment centre. The tips on page 22 will help students create their introduction. Each student presents their introduction and the instructor provides feedback using the Feedback Sheet (App. 2, p. 136).</li> <li>• Students to use the behavioural interview tips on pages 27-28 to prepare an interview answer about how they resolved a customer complaint. Print the Behavioural Interview STAR Worksheet (App. 3, p. 138) for students to write the answer. Then have the students present their answers. If a student has no customer service experience they can use the STAR format to recount how they resolved a difficult situation as a student or in another work environment.</li> </ul>
<p><b>Creative Instructor Notes</b></p>	<p>Seeing from the employer’s perspective is an extremely useful exercise when applying for a position. You may have students first make a list of attributes they are looking for as employers, and then role play an interview.</p>
<p><b>Homework</b></p>	<p>Students develop a resume/CV and cover letter for an agent position in a call centre where they would like to work.</p>
<p><b>Takeaway Message</b></p>	<p>The application process to a call centre is perhaps a bit different from other types of work, and involves specific steps. It is good to familiarise yourself with these steps so you know what to expect when applying to a call centre position.</p>

## Test Bank

1. How do employers ensure you have the skills and qualifications they desire?
  - A. They ask you.
  - B. They test you.
  - C. They ask your references.
  - D. **All of the above.**
  
2. According to the text, which of the following is NOT necessary to consider before taking a position in a call centre?
  - A. Hours.
  - B. Commute.
  - C. **Personality of the Team Leader.**
  - D. All of the above are important considerations.
  
3. Which of the following is NOT true of call centre training?
  - A. **Training is on the job.**
  - B. There is usually a classroom component.
  - C. Training can last more than a month.
  - D. All are true.
  
4. When an employer wants to hire you, you can expect:
  - A. They will call you several times trying to reach you.
  - B. **They will call once and leave a message.**
  - C. They will send you a letter.
  - D. Any of the above is possible.
  
5. In an interview, it is best to answer a question that begins with, "Tell me about a time when you..." with:
  - A. A short response.
  - B. A lengthy response.
  - C. **A response that follows a certain approach.**
  - D. A lie.

# Starting the New Position



## Chapter Overview

This chapter reviews the training process and the expectations of the new hire during training. It covers what you will learn in training, dress code, and projecting a professional image.

## Chapter Objectives

By the end of this chapter the successful student will be able to:

- Articulate the areas in which new hires will be trained.
- Recognise appropriate attire for the call centre work place.
- Identify what it means to project a professional image.

## Key Terms and Topics

### Chapter introduction

You got the job.

#### *Discussion question*

What sort of training do you think you will get for your new job? Do you think it is necessary to attend all sessions, even on topics and themes you know very well?

### Induction training

You need to regularly attend this training because your attendance reflects on your work ethic and professionalism (p. 35).

Also, every call centre has its own terminology and procedural and customer service requirements, which you will need to know (p. 35). You will be expected to know something about:

- your customers, including who they are and where they are from, what they expect from the organisation and in terms of service level, and how your products meet their needs (p. 36);
- common customer objections and how to overcome them, and how to personally help customers (p. 36);
- your company's products and how they differ from their competitors', and how you can develop this knowledge to help you better manage your calls (p. 36).

Your supervisors are paying attention.

- You will role play with other inductees so that you are prepared—and your supervisors can see that you are prepared—to deal with real customers (p. 36).
- Your progress will be monitored and you may have to take quizzes or tests, and your trainer will assess your progress (p. 37).

You should be paid for your training (p. 37).

*Discussion question*

What do you think is appropriate attire for work in a call centre?

**Dress code**

Adhere to the dress code of your organisation to ensure you are dressed appropriately for your job (p. 37).

Most call centres have either a business casual code or no code at all (p. 37).

- If written, be sure you are aware of the code and its details (p. 37).
- If unwritten, look to your team leader (p. 38).

*Discussion question*

What can you do to project a professional image in your call centre position?

**Projecting a professional image**

Projecting a professional image is more than how you dress, though that is certainly a part of it. Your professional image also consists of all of your work behaviours. You can project a professional image by demonstrating your commitment to customer service, team work and the call centre’s goals. You can do this by actively participating in training, striving towards team and individual goals, and continually improving your performance (p. 39).

**Experiential Exercises or Assessments**

In pairs, have students agree on a company they’d like to work for and might like to apply to. For this company, have them answer the following questions:

- Who are your customers? Are they from a particular area or demographic?
- What are customers expecting from the organisation you work for?

	<ul style="list-style-type: none"> <li>• What level of service do they expect?</li> <li>• How can the products and services offered meet customers' needs?</li> <li>• What are common customer objections and how can you overcome these?</li> <li>• How can you personally help customers?</li> </ul> <p>Students can write their answers on the Customer Requirements Worksheet (App. 5, p. 139).</p> <p>Their responses will be purely theoretical and may or may not be on target, but that is okay because the point of this exercise is to get students to start thinking from inside the industry. Hopefully, students will do this same exercise for themselves once they actually apply to a position with a company.</p>
<b>Creative Instructor Notes</b>	<p>Have students articulate what employers are looking for and will be watching for during the induction training. This perspective shift is aimed to increase student self-awareness and their ability to meet the expectations of future employers.</p>
<b>Homework</b>	<p>Using the text, have students make a list of questions they can expect answers to at induction training. Have them leave blank space for the answers. These can be used during induction training to help students learn the required material. Have students compare their lists in pairs or small groups.</p>
<b>Takeaway Message</b>	<p>Professionalism counts. It is important to be professional at all times during your training and to project a professional image at all times via your attire and other behaviours and involvement in call centre goals.</p>

Test Bank

1. What is appropriate attire for a call centre?
  - A. Business casual.
  - B. Business formal.
  - C. Casual.
  - D. **Whatever the Team Leader is wearing.**
  
2. Induction training best serves which of the following purposes?
  - A. **Enables your employers to ensure they want you to work for them.**
  - B. Gives you practice so you are not so nervous with actual customers.
  - C. Gives you a small taste of the actual job so you can be sure you still want it.
  - D. All of the above.
  
3. In induction training, which of the following is NOT likely to be included?
  - A. Common customer objections.
  - B. The centre's policies and procedures.
  - C. How your company's products differ from the competitors'.
  - D. **All of the above will be included in induction training.**
  
4. Induction training might include all of the following EXCEPT:
  - A. Quizzes on products.
  - B. Role plays of the computer system.
  - C. **An expectation of business formal attire.**
  - D. All of the above will be included.
  
5. A professional image is projected in all of the following ways EXCEPT:
  - A. Complying with the dress code.
  - B. Attending all training sessions.
  - C. **Projecting a "cool" persona.**
  - D. All of the above project a professional image.



## PART II

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# KEEPING THE JOB



# Your Role in the Success of the Call Centre



## Chapter Overview

This chapter discusses the importance of the agent role. It includes areas of the job over which the agent has control. It also discusses points on why the agent is more important than the CEO, and how the marketing department is dependent upon the agents.

## Chapter Objectives

By the end of this chapter, the successful student will be able to:

- Articulate the various aspects of the position over which the agent has control;
- Explain how the agent role is more important than the CEO's;
- Describe how the marketing department depends on the agents.

**Key Terms  
and Topics**

## Chapter Introduction

As agents are on the frontline, their actions can have an enormous impact on the way customers perceive the organisation and its call centres. It is therefore crucial that agents actively strive to do their best on each call (p. 43).

Agents can control the quality of customer service on calls, the accuracy of information they provide to customers, their availability to take customer calls and the way they work with others (p. 43). These factors all influence the call centre's service level results as well as the overall quality of service that the centre provides. Therefore the actions of each agent can have a significant impact on the overall performance of the call centre (p. 44).

### *Discussion question*

Who is more important to the company: the people with whom customers have contact or the CEO? Why?

### **Why you are more important than the CEO**

Customers connect the company with you and the other staff they have contact with (p. 45).

Each call is quite powerful. You have an opportunity to amaze the customer and correct any previous wrongdoings done by someone else (p. 45).

### *Discussion question*

What other departments might depend heavily on the agents?

### **Why the marketing department also depends on you**

The marketing department works hard to generate business and get customers to call the organisation. It is up to you to respect the marketing department's efforts and offer the best possible service to each and every caller (p. 45).

It is challenging not to sound like a robot toward the end of your shift, due to the repetition of call-taking or making. Developing genuine customer rapport can help alleviate this (p. 45).

<p><b>Experiential Exercises or Assessments</b></p>	<ul style="list-style-type: none"> <li>• In groups of 3-4, have students create a visual representation of the call centre, being sure to represent the varied roles of the agent position. Students should resist repeating the standard organisational hierarchy, instead being creative with the importance of the agent role.</li> <li>• Print the What I Can Control Worksheet (App. 5, p. 140) and have students fill in the blanks and then compare them to the same image on page 44 of the text.</li> </ul>
<p><b>Creative Instructor Notes</b></p>	<p>Within the visual representation exercise, do not delimit their creativity in any way. Students may draw, 3D construct, or act out the call centre, as their imaginations create.</p>
<p><b>Homework</b></p>	<p>Have students write a 500-word essay on the importance of the agent role within a call centre. They should use the material in the chapter, but also think beyond the given material.</p>
<p><b>Takeaway Message</b></p>	<p>Just because the agent role is at the bottom of the call centre hierarchy, do not make the mistake of thinking that it is not powerful or important. In some ways it is the most powerful and important job in the organisation.</p>

## Test Bank

1. Which of the following does the agent NOT have control over?
  - A. Call quality.
  - B. Queue Awareness.
  - C. Teamwork.
  - D. **Salary.**
  
2. Again, which of the following does the agent NOT have control over?
  - A. Quality of customer service on calls.
  - B. Availability to take customer calls.
  - C. **The performance of their team.**
  - D. The way they work with others.
  
3. Why is the agent role more important than the CEO's?
  - A. Agents make important decisions affecting the organisation.
  - B. **Customers interact with agents, not the CEO.**
  - C. Agents are usually younger than the CEO.
  - D. All of the above.
  
4. Why does the marketing department depend on the agents?
  - A. The agents interface with the customers.
  - B. Marketing works hard to generate new callers.
  - C. Agents can ask customers their opinions of marketing efforts.
  - D. **A & B.**
  
5. True or false: Call centre work can become monotonous and there is a tendency to be robotic if the agent doesn't build rapport with each customer.
  - A. **True.**
  - B. False.

# Customer Service



## Chapter Overview

This somewhat lengthy chapter covers the process of providing quality customer service. It includes many areas of the customer service pipeline: building rapport, positive attitude, using and answering questions, presenting service solutions and cross-selling, policy and procedure knowledge, product knowledge, blaming the customer, data entry, silences on the line, seeking out the Team Leader, call backs, referring customers further, the fulfilment process, and how to manage serial callers. The chapter concludes with a 4-page outline of call procedures.

## Chapter Objectives

By the end of this chapter, the successful student will be able to:

- Articulate how to build rapport, the importance of a positive attitude, and appropriate use of questions and question responses;
- Demonstrate understanding of service solution presentation and cross-selling;
- Demonstrate understanding of the importance of knowing policies and procedures, and products;

**Key Terms  
and Topics**

- ♦ Recognize the importance of doing data entry with the caller on the line;
- ♦ Demonstrate knowledge of what to do with silences, serial callers, call backs, further referrals, product knowledge, and when to ask the Team Leader for assistance.

**Chapter introduction**

“In order to provide excellent customer service, you need to have a positive phone manner, a range of skills—including rapport-building, asking and answering questions, and the ability to ‘fill the silences’—plus a sound knowledge of the fulfilment process and your company’s products, policies and procedures” (p. 47).

**Discussion question**

What are some of the techniques in building rapport?

**Rapport**

- ♦ Use your name and the customer’s name (p. 48).
- ♦ Actively listen to customers (p. 48).
- ♦ Sound alert (p. 48).
- ♦ Pay attention to queue times (p. 49).
- ♦ Respond to customer’s initial request positively (p. 49).
- ♦ Ask questions to clarify needs (p. 49).
- ♦ Review customer contact history in the database (p. 49).
- ♦ Ask questions to show interest in the customer (p. 49).
- ♦ Always be polite and courteous, not judgmental (p. 50).
- ♦ Do not use internal corporate jargon with customers (p. 50).
- ♦ Be patient with customers (p. 50).
- ♦ Do not leave them on hold for too long (p. 50).
- ♦ Try to resolve their issue yourself rather than passing them around (p. 50).
- ♦ Show some warmth (p. 50).
- ♦ Ask questions at the end to ensure customer satisfaction (p. 51).

*Discussion question*

Why is attitude towards callers important?

**Positive attitude towards callers**

- Callers from non-English speaking backgrounds may struggle. Be patient, and try to use different words from their words to clarify their needs. Be encouraging if the customer is struggling (p. 51).
- Be patient when helping customers with a product or website (p. 51).
- Do not make assumptions about customers or stereotype them (p. 52).

*Discussion question*

What sorts of question are there, and for what purposes is each question type used?

**Using questions**

- Open-ended questions begin with wh- words: what, why and where, when, who and also how. They are used to get information. Use them conversationally (p. 52) and keep your voice inquisitive so that you do not come across as if you are conducting an interrogation (p. 52).
- Closed-ended questions begin with a verb: do/does, are, can, would, will, is, have etc. They are used to gain facts and confirm your understanding and customers' decisions and satisfaction (p. 54).

*Discussion question*

What are the most appropriate ways of responding to customer questions?



### Answering questions

- Use more than merely yes or no in responses (p. 56).
- Represent your company by adhering to the company's level of (in)formality (p. 57).
- Review the list of appropriate and inappropriate responses and comments to customers (pp. 58-60).

#### *Discussion question*

How much information should you provide to help a customer, and how do you decide what to tell them?

### Presenting service solutions

- Provide only the most appropriate recommendations to the customer's concern rather than the entire list of possibilities (p. 61).

#### *Discussion question*

What is cross selling and how do you do it?

### Cross selling

- You will be asked to promote other products of the organization (p. 61).
- Use questioning techniques to determine what the customer may best benefit from (p. 61).

#### *Discussion question*

Why is it important to have thorough knowledge of policies, procedures, and products?

### Policy and procedure knowledge

- Call handling procedures are in place to help provide consistent and relevant customer service and to ensure an appropriate amount of time is spent on each call (p. 62).
- Make the most of the role play exercises during induction training (p. 62).

### Product knowledge

- It is vital that you are fully familiar with the company's products (p. 62).

#### *Discussion question*

What do you do when the customer is wrong?

### Blaming the customer

- If the customer is wrong, pointing it out will only make the situation worse. Instead, gently assist customers using suggested phrasing (p. 63).

#### *Discussion question*

What is the role of data entry while you are on a call?

### Data entry

- Try to complete data entry while the customer is still on the phone (p. 64). Be sure to record information accurately in the designated field (p. 64). Be sure to fill in information accurately (p. 64) and write call notes (p. 65).

#### *Discussion question*

What do you do with silences on the line?

### Silences

- When you are working, do not leave the customer in silence. Tell them what you are doing (p. 65).

#### *Discussion question*

When do you ask for help and from whom?

### Seeking clarification from Team Leader

- When you have a question, seek clarification from your team leader (p. 65).

#### *Discussion question*

What is a call back and why do you use them?

## Call backs

- If you and your team leader do not have the information readily available, offer to call the customer back (p. 66).

### *Discussion question*

What do you do when a customer needs more information than you can give?

## Referring customers further

- It is poor customer service to simply refer the customer to the website unless the information requested, such as a form, is only available on the web (p. 67). Be sure to convey the benefits of using the system (p. 67). The same applies when referring customers to the Interactive Voice Response (p. 67).

### *Discussion question*

What is the fulfilment process? What are the steps along the way and why is each important?

## The fulfilment process

- Be familiar with product delivery times and the fulfilment process so you can give customers accurate information on the time estimate (pp. 67-68).

### *Discussion question*

What are serial callers and what do you do with them?

## Serial callers

- If a customer calls repeatedly, he or she is probably not getting quality service the first time around. Be patient and be sure you have all of the necessary information from the customer and that they are satisfied (p. 68).

## Phone manner checklist

Please refer to the phone manner checklist on pages 69-73 for an outline of call procedures.

## Experiential Exercises or Assessments

- ◆ Rapport Fundamentals—Cheat Sheet Challenge: students in teams create a list on one page/flip chart of how to build rapport with customers. After this activity compare to rapport building techniques in the text (pp. 48-51).
- ◆ Active Listening Exercise: Pair students. Students take turns to share something that happened in their life that week or relate some trivial story. Instruct students that when listening they should focus on being curious and present. After one student of each pair has shared, ask if the other student was really engaged and present the whole time, or if he/she was leaping ahead and thinking of what scenario they would share next or something else that prevented them from fully listening to the speaker. After this brief discussion, let students get back to work and the second person of the pair shares. Afterward, ask the listeners if they were reflecting on what they had said previously (perhaps thinking they could have done that better) or if something else was in their minds instead of fully focusing on the other person. Explain the importance of fully listening to the customer's request (and usually taking notes) before offering or thinking of offering solutions. Switch partners and repeat the exercise, with students focusing intently on being fully present in the conversation. Once this round is complete, switch pairs again and this time the students sit back-to-back. Repeat the exercise.
- ◆ Role play: Put 3 students together. Two students are back-to-back to simulate a phone conversation and the third student is an observer. On the "phone", one student is the customer and the other assumes the agent role. Using the Role Play Scenarios (App. 6, p. 141) "Customer" students should intentionally be not great on the phone, e.g. by giving incorrect information and asking for information they are reasonably sure the agent won't have. "Customers" should provide difficult scenarios for the agents to work through. Complete the customer service call. Observing students use the Observer Checklist (App. 6, p. 143) to note what the agent did well and where the agent erred or could improve. This discussion follows the "call". Students switch roles and repeat, so that each student has each role at least once. Gauge the class—if students need another round of practice with this material, give them another round.

<b>Creative Instructor Notes</b>	<p>After the role play exercise, or perhaps before the exercise, choose two students to model this phone call for the class. The two students involved in the role play intentionally do some things well and some things poorly. Afterward, the class discusses what was done well and what was done poorly.</p>
<b>Homework</b>	<p>Have students review this chapter carefully and note the two areas in which each of them anticipates the greatest challenge. For each of these areas, have them do the following: 1) Identify the area; 2) Note why they are apprehensive about this step or anticipate difficulty with it; and 3) Construct a personal plan for overcoming this challenge.</p>
<b>Takeaway Message</b>	<p>It is very important that the customer be treated properly. The words you choose and the manner with which you conduct yourself matter a great deal. This chapter outlines appropriate customer service conduct.</p>
<b>Test Bank</b>	<ol style="list-style-type: none"> <li>1. When there is silence on the phone line, it is best to:             <ol style="list-style-type: none"> <li>A. Let there be silence.</li> <li>B. Fill the silence with a personal story.</li> <li>C. Fill the silence with information on what you are doing.</li> <li>D. Take the opportunity to build better rapport with the customer.</li> <li>E. <b>C &amp; D.</b></li> </ol> </li>   <li>2. When a customer is wrong, which of the following is the best response?             <ol style="list-style-type: none"> <li>A. "I'm sorry, but you might want to check that information again. I think you may be mistaken."</li> <li>B. "Are you certain that's correct information? My records show something different."</li> <li>C. <b>"I can see how that might have been confusing. Here's what I can do."</b></li> <li>D. None of the above.</li> </ol> </li> </ol>

3. When presenting customer service solution possibilities, it is best to:
  - A. Give the customer the full range of options from which they can choose.
  - B. Give the customer the one most appropriate option based on the information you have gained from the customer.**
  - C. Give the customer a few options to choose from so that they know they have choices.
  - D. None of the above.
  
4. When you do not know what to do with a caller, you should:
  - A. Go to get some help from colleagues in other departments.
  - B. Stay in the call centre and contact your Team Leader.**
  - C. Ask a co-worker.
  - D. None of the above.
  
5. When you do not have all of the information a customer wants and it will take some time to gather it, it is best to:
  - A. Tell the customer they will be called back either by your Team Leader or another representative once the information is available.**
  - B. Ask the customer to call you back within 30-60 minutes, or as long as you think you will need to gather the information.
  - C. Tell the customer to check the website.
  - D. Refer the customer to another company.

# Sales



## Chapter Overview

Chapter 6 focuses on the sales process. It covers the role of questions and how they can be used very effectively to achieve sales, the importance of knowing the features and benefits of products being sold, and how to manage customers hesitant about product pricing. The chapter closes with commentary on what you might expect from your co-workers if you are the top salesperson.

## Chapter Objectives

Upon completing this chapter, the successful student will be able to:

- Demonstrate understanding of the sales process in a call centre environment;
- Recognise the immense value of asking appropriate questions;
- Articulate the reasons why it is necessary to fully understand the features and benefits of the products being sold.

## Key Terms and Topics

### Introduction

You will likely be provided with a script for your sales calls. “Keep in mind that the sales scripting you are provided with has usually been well honed and is thought to be the best way of making sales. So all you need to do is follow the scripting, training and instructions provided by your team leader using an upbeat, pleasant voice. The scripting includes the use of questions. By asking questions, you are controlling the call and getting maximum information from the customer about whether you can match one of your company’s products to the customer’s needs” (pp. 75-76).

“A goal-focused attitude is required in sales. Every customer contact is as an opportunity to make or retain business” (p. 76).

#### *Discussion question*

In sales, why is the use of questions important? What are your goals in asking questions?

### Questioning skills

- Remember that in sales, you are helping a customer make a purchasing decision that the customer will be happy with, so use open-ended questions to ascertain how you can help them with this (p. 77).
- Be sure to paraphrase the customer’s request to ensure your understanding (pp. 77-78).
- Access the customer record to see if you can help them further (p. 78).
- Ask marketing questions to see which promotional material got them to call (p. 78).
- Establish your customer’s needs by asking further questions (p. 78).

#### *Discussion question*

Why is it important to know all of the features and benefits of the products you are selling?



## Features and benefits

Using the answers from the questions you have asked, you can tailor the presentation of the product to the customer's needs (p. 79). You want to be sure you know the benefits of the products, not merely the products themselves (p. 80).

- Ask questions to ensure the customer will find the benefit useful (p. 81).
- Close the sale by presenting the price (p. 82) and explaining the next step in the process (p. 82).
- If the customer's response to the price is negative, be empathetic and try to overcome their objection by addressing their specific concerns directly (p. 82).
- Make payment arrangements (p. 83).

### *Discussion question*

What do you do with co-worker tension that may arise when you achieve high sales?

## Tall Poppy Syndrome

If you are making a lot of sales, your co-workers may be envious of you and may suggest you are doing something dodgy to get those figures. As long as you have been following procedure, be proud of your achievements and do not let others' envy get you down (p. 84).

## Experiential Exercises or Assessments

- Features and Benefits Practice. Using the So You Can Worksheet (App. 7, p. 144) students are to practice linking products features and benefits phrases.
- Sales Approach practice. Print out the Sales Approach Worksheet (App. 8, p. 146). Students are to create promotional phrasing for products, using different sales angles.

	<ul style="list-style-type: none"> <li>• Role play: Using the Inbound Sales—Role Play Activity (App. 9, p. 148) have students read through scenario 1 and add ‘So You Can’ phrases to fill in the blanks on the script. Then paired students sit back-to-back (to simulate a phone call, so they can’t see each other’s faces). One person is the customer and the other is the agent. Those in the customer role are sometimes pleasant and eager (following the role play script), and other times less pleasant and more difficult throughout the process. Those in the agent role need to be sure to satisfy the customers and persuade them to purchase. Have students switch partners after every “call”. Do this four to six times, so that everyone has an opportunity to be the caller and the agent at least twice each. If students appear to need more practice, do another round (for six rounds total). Once they have mastered scenario 1 with its role play script, have students read scenario 2 and create some ‘So You Can’ phrases and a basic call flow; then have the students role play this in pairs. Repeat, switching roles so that everyone has an opportunity to be the caller and agent.</li> </ul>
<p><b>Creative Instructor Notes</b></p>	<p>Allow the students to lead the role play exercise themselves as much as possible, since once they are actual agents they will themselves be in the driver’s seat.</p>
<p><b>Homework</b></p>	<p>Have students reflect on the two most challenging aspects of the sales call for themselves, and then strategize on how to overcome those challenges. This can be done in a short paper format, or in notes for them to share in small groups at the beginning of the next class.</p>
<p><b>Takeaway Message</b></p>	<p>While not everyone may be a born salesperson, there are techniques everyone can use to be more successful in sales. These techniques include asking the right questions, knowing your products’ features and benefits very well, and assisting customers when they are concerned about pricing. If you are the top salesperson, be proud of your achievements and do not let the envy of others stand in your way.</p>

## Test Bank

1. Why is it important to paraphrase the customer's request?
  - A. **To be sure you have got the order 100% correct.**
  - B. To flatter the customer by repeating to them what they've said.
  - C. Both of the above.
  - D. None of the above.
  
2. How do you establish customer needs?
  - A. By checking the customer record.
  - B. **By asking careful questions.**
  - C. By paying close attention to tone of voice.
  - D. All of the above.
  
3. Why is it important to ask questions to confirm the product's benefit is useful to the customer?
  - A. **You want to be sure the customer is satisfied with his or her purchase.**
  - B. You want to be sure you sell the customer the correct product for his or her needs.
  - C. You want your company's reputation for quality to be intact.
  - D. All of the above.
  
4. What do you do if the customer objects to the price?
  - A. Present the benefits of the product again.
  - B. **Try to overcome the objection by pointing out the product's features that justify the set price.**
  - C. Get your Team Leader to help.
  - D. Thank them for calling and for their interest, and let them go.
  
5. Which of the following is NOT a step in the payment arrangement process?
  - A. Repeating customer's credit card information back to the customer.
  - B. Discussing anticipated timeframe for delivery.
  - C. Writing relevant call notes.
  - D. **All are steps in the payment arrangement process.**

# Outbound Work



<b>Chapter Overview</b>	Chapter 7 covers the different types of outbound call campaign. It addresses the specific components, goals, and challenges of each.
<b>Chapter Objectives</b>	By the end of this chapter, the successful student will be able to: <ul style="list-style-type: none"><li>• Describe each of the four types of campaigns covered in this chapter;</li><li>• Articulate the goals of each campaign type;</li><li>• Identify the challenges of each campaign type.</li></ul>
<b>Pre-chapter Activity</b>	Matching: Students try to match job titles to outbound job descriptions

## Key Terms and Topics

### Introduction

The main types of outbound work are data collection for surveys, appointment setting, collections, and telemarketing campaigns (p. 85).

#### *Discussion question*

If you are going to conduct a survey, what are some of the important things you need to be aware of?

### Data collection for surveys

You are generally provided with a full script for greetings and customer service phrasing when working on a data collection campaign (p. 85). Be sure you understand the campaign strategy and targets (p. 85). Make sure you find out the parameters of the survey, including its length and what is expected of you (p. 86).

#### *Discussion question*

What does an appointment setting campaign involve?

### Appointment setting

These campaigns are often used in B2B settings and involves calling potential customers to assess their interest in your organisation's goods or services, and setting an appointment for a representative to follow up with them (p. 86). Things to remember are the importance of accurately recording data in the database, clarity of appointment/job details, and adherence to the organisation's dispatch protocols (p. 87). Appointments are usually scheduled using an electronic calendar and customer database (p. 87).

#### *Discussion question*

What is collection work and what is it important to keep in mind when working on these sorts of campaign?

## Collections

Collection work “involves calling customers who are defaulting on payments. Quite comprehensive training is provided for collections roles in order to ensure that agents comply with relevant credit legislation and regulations” (p. 87). You will usually receive a list of customers to call, and your job will be first to familiarize yourself with their specific situation, and then to set up payment arrangements with them (p. 87). Even though these calls are usually recorded, it is necessary to record everything accurately in the database (p. 88).

### *Discussion question*

What are the most effective telemarketing campaigns and why?  
What are the biggest challenges in telemarketing campaigns?  
What are important goals to keep in mind?

## Telemarketing

In today’s market, the most effective telemarketing campaigns involve warm calls, or calling a customer who already has a relationship with the company to cross sell or to request they return to the company (p. 88). Charities use cold calls (p. 89). It is important to be familiar with the script and to know to what extent you can deviate from it, as well as any mandatory operational requirements (p. 89). Quality customer service is very important, and this environment can be challenging with rude customers (p. 89). It is a good idea to get clarification from your team leader about how to handle specific challenging customer situations (p. 90).

<b>Experiential Exercises or Assessments</b>	<p>Role play activity: Print copies of the Outbound Survey—Role Play Activity (App. 10, p. 151) and the Outbound Appointment Setting—Role Play Activity (App. 11, p. 153). Then divide the class in half. One half will be respondents and the other half will be callers. Of the callers, give the survey script to one half and the appointment setting script to the other half. Respondents can have both scenario handouts. Determine the degree of deviation from the script permitted. Callers approach respondents randomly and then stand or sit back-to-back. Callers deliver their scripts. Respondents can use the scenario suggestions to respond or respond as they wish—some politely, some with myriad questions, and some quite impolitely. Callers manage the “call” as best they can. Have callers “call” at least two people, three if time permits. At the end of the last call, debrief—what was challenging? what surprising? what difficult? etc. Then switch roles, with the previous callers becoming respondents and the previous respondents becoming callers. Repeat.</p>
<b>Creative Instructor Notes</b>	<p>When debriefing the script activity point out how displaying empathy is always important, even on a simple survey call.</p>
<b>Homework</b>	<p>Students are to read through the Outbound Sales and Customer Service—Correction Activity (App. 12, p. 155) and then answer the questions about how service could be improved and sales opportunities maximized.</p>
<b>Takeaway Message</b>	<p>There are four essential types of outbound call campaign. Each has its own set of important considerations, goals, and challenges. Whatever sort of campaign you are working on, it is good to familiarise yourself with the specific elements of your campaign type.</p>

## Test Bank

1. When working with a script, it is important to:
  - A. Be familiar with the script.
  - B. Know whether you are allowed to deviate from the script.
  - C. Know if there are any mandatory operational requirements including legislation compliance.
  - D. **All of the above.**
  
2. All of the following are important things to learn about the survey before you begin making calls for data collection EXCEPT:
  - A. What to say if a customer asks how you got their phone number.
  - B. How to record a response not in the drop-down list.
  - C. **Whether the survey is mandatory.**
  - D. All of the above are important things to learn beforehand.
  
3. All of the following are generally acceptable resolutions for collections calls EXCEPT:
  - A. Postponed payment.
  - B. **Reduced payment.**
  - C. Part payment and extended payment terms.
  - D. All are generally acceptable resolutions.
  
4. Which is more important on an outbound campaign?
  - A. The number of calls made.
  - B. **The number of customer contacts made.**
  
5. True or False: Appointment setting involves cold calling customers to try and set appointments for a senior agent to speak with them.
  - A. True.
  - B. **False.**



# Customer Emails and Web Chat Enquiries



## Chapter Overview

Communicating with customers via email and/or web chat brings its own set of considerations. This chapter provides some tips to keep in mind for quality email and web chat communications.

## Chapter Objectives

At the end of this chapter, the successful student will be able to:

- Describe the expectations of using email and web chat in customer communications;
- Communicate email handling tips accurately;
- Explain differences and similarities in web chat and email communications.

## Key Terms and Topics

### Introduction

“When responding to customer emails, make use of any company-supplied email templates” (p. 91).

“Customers expect fairly instant responses” (p. 92). “Slow email responses could result in lost business” (p. 92).

### *Discussion question*

When handling emails, what are some things to keep in mind?

### Tips for handling emails

- Respond promptly (p. 93).
- Personalise the response (p. 93).
- Use the salutation Dear Mr... (p. 93).
- Include relevant, clear information (p. 93).
- Include Thank you for your enquiry at the beginning of the email (p. 93).
- Keep the email concise (p. 94).
- Draw from the FAQ knowledgebase where possible and appropriate (p. 94).
- Anticipate customer questions and address them (p. 94).
- Use positive phrasing that demonstrates your willingness to help (p. 94).
- Keep the tone in line with the organisation’s marketing image (p. 94).
- Use short paragraphs and double paragraph spacing (p. 94).
- Use positive closing phrasing (p. 94).
- Proofread carefully (p. 95).
- Do not use informal language (more appropriate for texting your friends) (p. 95).

### See email examples

Examples illustrate these tips (pp. 96-97)

	<p><i>Discussion question</i></p> <p>How is web chat different from email? The same?</p> <p><b>Web chat</b></p> <p>The above email handling tips also apply to web chat. The main difference is that web chat is live, which demands immediate accessibility and availability to answer questions (p. 98).</p> <p>Web chat customers are more than likely asking about information on the website, so it is essential to be familiar with the website text and how customers might interpret it (p. 98).</p>
<p><b>Experiential Exercises or Assessments</b></p>	<ul style="list-style-type: none"> <li>◆ Error correction: Give students the Email Correction Worksheets (App. 13, p. 157) all of which contain some level of errors. In groups of three to four, have students correct the emails.</li> <li>◆ Matching exercise: Using the Costs of Poor Quality Worksheet (App. 14, p. 163). Students match the three problems associated with poor quality calls and emails with their impacts on the overall business.</li> </ul>
<p><b>Creative Instructor Notes</b></p>	<p>In presenting each of the above tips, discuss why each particular practice is important, and the different messages the customer receives from you when the practice is adhered to and when it is not.</p>
<p><b>Homework</b></p>	<p>Give students a sheet with the information they will need to answer your question. Send students an “enquiry” email and have them respond. Advise them that they will be evaluated on the above criteria more than on the accuracy of the information they provide (since the information will be fictional).</p>
<p><b>Takeaway Message</b></p>	<p>Email and web chat communications have their own set of tips for success. Follow the tips given in this chapter for quality email and web chat communications that meet and/or exceed organisational and customer expectations.</p>

### Test Bank

1. When emailing a company, when should customers expect a reply?
  - A. Immediately.
  - B. When indicated on the website.**
  - C. The next business day.
  - D. The same business day.
2. True or false: When responding to an email, sometimes it is best to make a telephone call.
  - A. True.**
  - B. False.
3. Which of the following should NOT be used in an email response?
  - A. All capitalised letters.
  - B. Email abbreviations such as btw.
  - C. *Hello*.
  - D. None of the above should be used in an email response.**
4. Your email tone should be:
  - A. Formal and professional.
  - B. Friendly and professional.**
  - C. Comfortably casual.
  - D. Informal and casual.
5. When using web chat, you should do all of the following EXCEPT:
  - A. Be a fast typist.
  - B. Handle three chat conversations at once.
  - C. Match the customer's level of formality in terms of common web abbreviation use.**
  - D. You should do all of the above.

# Writing Reports



## Chapter Overview

This chapter covers considerations of report writing and includes commentary on audience, tone, grammar and language.

## Chapter Objectives

By the end of this chapter, the successful student will be able to:

- Articulate the considerations of successful report writing.
- Provide commentary on appropriate versus inappropriate language in report writing.

**Key Terms and Topics**

**Discussion question**

What are some important considerations when writing reports?

**Introduction**

“From time to time in a call centre role you will be required to write a report. This could be: the team meeting minutes; a report on a team activity or event; a summary of a marketing campaign including results; new information needed for call handling; or a collation of call, sales or customer satisfaction survey statistics” (p. 99).

Your first consideration should be of audience. Who is this report intended for? Who will be reading it? (p. 99).

After determining your specific audience, select appropriate tone and report format (p. 99).

Proofread carefully not only for grammar, spelling, and punctuation, paragraph construction and readability, but also for word choices. Be sure your language is non-discriminatory and inclusive. Ask your team leader to proofread it once you have completed it (p. 100).

Comply with any organisational standards such as template, letterhead, etc (p. 100).

Complete the report punctually (p. 100).

**Experiential Exercises or Assessments**

Group report writing: Prepare information from which to write a report. In groups of 3-4, students ask themselves the important questions and answer them on a sheet of paper. Students then draft the report, obscuring their names from plain view (e.g. names on the back). Use a projector to show the class each group’s reports, anonymously. Evaluate strengths and areas for improvement together.

<b>Creative Instructor Notes</b>	Give students a few different scenarios to write reports for — there are some report topics on page 99 of <i>How to Survive (&amp; Thrive)</i> in a Call Centre text. Vary the degree of difficulty in constructing a report from the given information. Students write additional reports either in groups in class, in groups or pairs outside class, or independently as homework, as you like.
<b>Homework</b>	Write a report on the ways call centre agents can provide excellent customer service. Be sure to follow the steps outlined in this chapter. Be able to answer questions about audience and language appropriateness.
<b>Takeaway Message</b>	Report writing is sometimes part of the agent’s job. There are specific considerations for writing good reports, and they are outlined in this chapter.

## Test Bank

1. When writing a report, your first concern needs to be:
  - A. Audience.
  - B. Tone.
  - C. Organization.
  - D. Sentence Structure.
  
2. When considering the tone of your report, you should aim to:
  - A. Provide an accurate reflection of your personal contributions.
  - B. Entertain as well as inform.
  - C. **Make your audience happy.**
  - D. All of the above.
  
3. When proofreading, which of the below do you NOT need to watch out for?
  - A. Grammar errors.
  - B. Ease of reading.
  - C. Inclusive language.
  - D. **You need to check for all of the above.**
  
4. True or false: Sometimes you will be provided with a pre-determined template for writing your report.
  - A. **True.**
  - B. False.
  
5. When you are finished, you still need to do some things. What do you NOT need to do?
  - A. Have your team leader proofread it.
  - B. Turn it in punctually.
  - C. Double check the format.
  - D. **You need to do all of the above.**



# Use of Multiple Information Sources



## Chapter Overview

This chapter provides an introduction to the types of technology often found in call centres.

## Chapter Objectives

By the end of this chapter, the successful student will be able to:

- Discuss the various types of resource necessary to access during a call;
- Describe the various call centre technologies presented in this chapter.

## Key Terms and Topics

### Discussion questions

Why is it important to use the available systems to answer customer questions rather than memory or printed notes? In what ways can you keep up to date with changes that involve how you handle calls?

### Introduction

“In a call centre, you will be required to use multiple information systems to handle customer enquiries. This involves having multiple systems open on your screen and navigating between these while speaking to the customer” (p. 101). Additionally, you may need to access your organisation’s internet or intranet, and you may have to rely on important paper-based sources (p. 101).

These sources and systems must be used for each call. You will also need to enter data into the system. All the while you will need to be communicating with the customer (p. 101).

It is important to practise as much as possible to build your confidence in using these sources and systems (p. 102).

### Discussion question

What types of technology might you expect to find in a call centre? What might you be expected to have up on your screen simultaneously?

### Call centre technology

In a call centre, you may encounter:

- Automatic Call Distributor (ACD): A phone system, ACD allows queuing of calls and routing to the first available agent (p. 103).
- Contact management system: Customer record database, allows the agent to view a customer’s history and notes from previous calls (p. 103).
- Knowledgebase: A product database to access information about the organisation’s products (p. 103).

	<ul style="list-style-type: none"><li>• Interactive Voice Response (IVR): Helps route calls with, for example press 1 for sales, 2 for billing etc. (p. 103).</li><li>• Predictive dialler: Used in high volume outbound call campaigns. Phone numbers are loaded and automatically dialled (p. 104).</li></ul>
<b>Experiential Exercises or Assessments</b>	<p>Using Call Centre Technology Worksheet (App. 15, p. 164). Print enough sheets for half the class. Cut the sections apart so the original sheet of paper is now in five smaller labelled sections—ACD, Contact management system, Knowledgebase, IVR, and Predictive Dialler. Pair students. One student in each pair, the “agent”, receives a full set of five “technologies”. The pairs initiate a phone call. For each step of the call, the agent places the technology being used, sort of like playing cards. Students simulate the call from start to finish. Students switch roles. After one full round (both students have a chance to be both agent and caller), switch pairs and repeat, as many times as seems appropriate for the group and time considerations. Students should also vary the campaign type so that the predictive dialler can be used.</p>
<b>Creative Instructor Notes</b>	<p>Allow students to create any script for any sort of campaign they would like. It can be ridiculous in content, as long as professional decorum is maintained. The point of this exercise is to familiarise students with the technologies, not the content. So, permit students to do as they like with this exercise.</p>

<b>Homework</b>	<p>Students make a call to a call centre of their choosing for any reason the student wishes to use. It may be to their phone company to inquire about a particular service, or another organisation likely to use a call centre. During the call, students make note of which technology is most likely being used by the agent at various steps within the call. Students write a short thought paper, noting if their perspective toward this process had changed at all as a result of their new knowledge. Students also comment on any parts of the conversation where they did not understand what sort of technology the agent would have been using. Rather than asking the agent (though if students feel it is appropriate to do so during their call, they may), students report this in their thought paper. In the next class, these sorts of questions are discussed.</p>
<b>Takeaway Message</b>	<p>There are multiple types of source and technology that must be used during a call. It is important to be familiar with these sources and technologies so you are comfortable working with them and come across as confident and competent to the customer.</p>

## Test Bank

1. What sort of phone system routes calls to the first available agent?
  - A. Automatic Call Distributor
  - B. Call Queuer
  - C. Automatic Dialler
  - D. Predictive Dialler
  
2. Which system stores the customer database?
  - A. Automatic Call Distributor
  - B. Knowledgebase
  - C. **Contact Management System**
  - D. None of the above
  
3. Which system stores the product database?
  - A. Contact Management System
  - B. **Knowledgebase**
  - C. Interactive Voice Response
  - D. None of the above
  
4. \_\_\_\_\_ is added to the ACD.
  - A. Interactive Dialler
  - B. **Interactive Voice Response**
  - C. Knowledgebase
  - D. Contact Management System
  
5. Which system makes calls automatically?
  - A. Automatic Call Distributor
  - B. Automatic Dialler
  - C. **Predictive Dialler**
  - D. None of the above

# Call Coaching



## Chapter Overview

This chapter focuses on the procedure for call coaching as an integral part of ongoing training. It discusses the importance of call monitoring and the exponential implications of poor call quality.

## Chapter Objectives

By the end of this chapter, the successful student will be able to:

- Articulate what call coaching is and why it is important;
- Express how to manage difficult coaching conversations;
- Explain the implications of poor call quality.

## Key Terms and Topics

### Introduction

“Call coaching is part of an ongoing training programme for agents and involves a team leader or quality assurance specialist listening to a sample of the agent’s calls (either live calls or ones that have been recorded), comparing the call to the centre’s call-taking procedures and quality standards, and then providing the agent with coaching feedback” (p. 105).

Call coaching generally occurs more frequently at the beginning of your call centre employment, but throughout your employment you can expect to receive call coaching (p. 106).

#### *Discussion question*

How do they monitor you?

### Types of call monitoring

- Silent / remote monitoring: team leader or quality specialist listens to the call. Some use screen capture technology which allows the monitor to observe screen activity as well (p. 107).
- Side-by-side monitoring: team leader sits beside you and uses a special headset (p. 108).
- Monitoring pre-recorded calls: Random recordings of a certain percentage of each agent’s calls are assessed (p. 108).

#### *Discussion question*

How fair and reasonable is the call coaching?

### Call coaching fairness

To be effective, call coaching needs to be timely and ongoing (p. 109). Ask for regular call coaching feedback if you are not receiving it (p. 109). During the feedback, ask for one or two main areas where you need to improve (p. 109). If feedback is delivered harshly and you find yourself offended, take care to bring the focus onto one or two areas you can improve (p. 109). The purpose is skill development and it is part of your ongoing training, not an excuse to demoralise you (p. 110).

*Discussion question*

What about email and web chat? Do agents receive coaching in these avenues as well?

**Email and web chat quality**

These channels are overseen as well for quality control, and agents using these channels will receive coaching based on a randomly drawn percentage of their customer interactions (p. 110).

*Discussion question*

Why is it so important to monitor call quality? So what?

**Costs of poor quality**

“Poor quality can result in cancellations and returns, customer complaints, and multiple calls from customers” (p. 110). Each has wider repercussions for the business.

- Cancellations and returns: result in loss of business, loss of market share, and direct costs (p. 111).
- Customer complaints: result in compensation costs, extra work and additional call costs, added stress, deteriorating service levels across the board, negative reputation (p. 111).
- Multiple customer calls: result in increase in unnecessary calls, skewing call centre’s call volume forecast and service level targets, and raising call costs (p. 111).



<b>Experiential Exercises or Assessments</b>	<p>Role play activity: Put students in groups of three. One student is the agent, one the caller, and the third is the call monitor. Using the Call Coaching Role Play Activity (App. 16, p. 108) or any script or campaign type, have the agent intentionally do some things very poorly. At the end of the call, the call coach gently points out areas needing improvement. Students switch roles and repeat twice, so that all group members have an opportunity to play each role. This is an exercise in familiarising students with the practice so that they are perhaps less nervous when the time actually comes for this. It also helps students practise giving and receiving constructive criticism.</p>
<b>Creative Instructor Notes</b>	<p>If you like, distribute to callers the Extended Call Coaching Role Play Activity (App. 17, p. 166), which has scenarios for “angry customer”, “talkative customer”, “customer repeats questions”. Try to give different caller roles to different members of the same group.</p>
<b>Additional Reading</b>	<p><i>How Call Coaching Helps You to Become More Confident</i> by Alison Mathiebe (App. 18, p. 167). Have students read through the article individually. Class discussion questions: Did the article change your perspective of call coaching? How practical do you think it is to implement the ten tips given?</p>
<b>Homework</b>	<p>Reflection: have students write a short reflection on receiving call coaching. Part of the assignment is to include commentary on apprehensions, and plans/perspectives to help overcome those apprehensions. Thirdly, students comment on how they intend to manage a call coaching session where the coach is less than polite in his/her delivery of constructive criticism. The next class, discuss these matters in class.</p>
<b>Takeaway Message</b>	<p>Call quality is essential to a successful organisation utilising a call centre. It is vital to receive call coaching and to learn from it.</p>

**Test Bank**

1. Each of the following is a type of monitoring EXCEPT:
  - A. Side-by-side monitoring
  - B. Reviewing pre-recorded calls
  - C. Remote monitoring
  - D. **All are types of call monitoring**
  
2. True or false: i) Call coaching is part of your training, and ii) you can expect to receive call coaching throughout your employment
  - A. **True, true**
  - B. True, false
  - C. False, true
  - D. False, false
  
3. The intended outcome of call coaching is \_\_\_\_\_.
  - A. **Skill development**
  - B. Error catching
  - C. Oversight
  - D. All of the above
  
4. All of the following are costs of poor call quality EXCEPT:
  - A. Returns
  - B. Complaints
  - C. Multiple customer calls
  - D. **All of the above**
  
5. Customer complaints can most directly result in:
  - A. Loss of market share
  - B. Higher telephony costs
  - C. **Agent stress**
  - D. All of the above

# Punctuality



## Chapter Overview

Chapter 12 covers the importance of timeliness and the reasons why timeliness is so particularly important in a call centre. Tips are offered for punctuality.

## Chapter Objectives

By the end of this chapter, successful students will be able to:

- Articulate the reasons why it is important to arrive punctually;
- Explain why it is important to clear all calls at the end of the queue;
- Articulate several tips for helping with punctuality.

## Key Terms and Topics

### Introduction

“In many call centres your start time is when you are supposed to be logged in and ready to take your first call. This involves getting there ten minutes earlier to make a coffee, start your computer and be logged into relevant customer databases and the phone system by the start time. If there are calls waiting in the queue at your start time, you need to begin answering these straightaway” (p. 113).

### *Discussion question*

What are some things you can do to save time in the morning that will help you get to work on time?

### Tips for being punctual

- Iron all clothing for the week the night before your work week starts (p. 114).
- Prepare children’s clothing for the week as well (p. 114).
- Prepare lunches the night before (p. 114).
- Put everything you need in one place (p. 114).
- Prepare morning food the night before, as far as possible (p. 114).
- Use an alarm with a back-up battery (p. 114).
- Try going to bed earlier (p. 114).
- Install a water timer in the shower (p. 115).
- Have a realistic schedule for your morning routine and stick to it (p. 115).
- For public transport, be very aware of the schedule and do not take the one that gets you to work just a few minutes before your shift (p. 115).
- For driving, be realistic about commute times and buy your fuel the night before (p. 115).
- Listen to the traffic reports during breakfast (p. 115).
- Set a goal to arrive at work 10 minutes prior to your shift start time (p. 115).

	<p><b>Discussion question</b></p> <p>What is assumed of you when your shift end coincides with the closing hours of the call centre?</p> <p><b>Staying until queue closing time</b></p> <p>If your shift end coincides with the phone lines closing, you need to be sure all calls in the queue are answered before you leave (p. 116).</p> <p>It is best if the team scheduled at closing time work together to quickly clear the last calls (p. 116).</p>
<p><b>Experiential Exercises or Assessments</b></p>	<p>Students go through the list of tips and give numbers 1-13 to the tips offered, with 1 being the most important and 13 being the least likely to occur, or not relevant to their situation. They then go back through the list and describe exactly what they are going to do to exercise each tip. Have students think creatively and come up with 1 or 2 more tips each. In groups of 3-4, have students share their lists, their plans, and their additional ideas. Students can discuss their struggles in certain areas and perhaps get insight from each other on ways to overcome those personal struggles.</p>
<p><b>Creative Instructor Notes</b></p>	<p>Write all additional tips on the board for all students to benefit from.</p>
<p><b>Homework</b></p>	<p>Do number 1 on your list.</p>
<p><b>Takeaway Message</b></p>	<p>Arriving on time means arriving 10 minutes early. Staying until the end of shift sometimes means staying until all calls are cleared, so a few minutes after the shift ends.</p>

## Test Bank

1. Being “on time” means:
  - A. Walking through the door a minute before your scheduled shift starts.
  - B. Being at your seat ready to take calls at your scheduled shift start time.**
  - C. Coffee in hand, on your way to your seat at your scheduled start time.
  - D. Arriving 30 minutes early.
2. At the scheduled end of your shift, you:
  - A. Pack up and leave.
  - B. Keep taking calls.
  - C. Clear the queue.**
  - D. Punch out.
3. The queue closing time is determined by:
  - A. Your watch.
  - B. Your team leader’s watch.
  - C. Your phone system clock.**
  - D. The clock on the wall.
4. Which of the following is NOT a given tip for improved punctuality
  - A. Set your alarm clock 30 minutes early.**
  - B. Iron 5 outfits Sunday night.
  - C. Pour your breakfast cereal into a bowl the night before.
  - D. Listen to traffic reports.
5. Your goal is to arrive at work:
  - A. Some time before your scheduled start time.
  - B. 10 minutes before your scheduled start time.**
  - C. Before your team leader.
  - D. Before anyone else.

# Attendance



## Chapter Overview

Chapter 13 covers the details of attendance, including the importance of regular attendance and how to manage when you do not feel well.

## Chapter Objectives

At the end of this chapter, successful students will be able to:

- Explain why strong attendance is important;
- Describe the process of calling in sick;
- Articulate appropriate and inappropriate reasons and methods for calling in sick.

## Key Terms and Topics

### Introduction

“The management team have calculated how many staff are required to answer the estimated number of customer calls. This calculation includes expected staff sick leave but when sick leave becomes excessive this can cause a real problem” (p. 117).

“Excessive sick leave in the call centre leads to stress for those colleagues still working and longer wait times and therefore a poor service experience for customers” (p. 117).

“If you are feeling burnt out it is best to schedule some recreation leave to have a break from work” (p. 117).

### *Discussion questions*

What are the usual unspoken policies for sick leave? What are good reasons to call in sick?

### Sick leave

Taking an unscheduled sick day for mental health reasons (i.e. burnout) is possible but should be rare. Think about the impact of this on your team mates (p. 118).

Your sick leave is monitored, and if your sick leave is excessive you will be required to have a discussion with your team leader about this (p. 118). This discussion may include goal setting strategies for improving your attendance, and consequences for continued absences (p. 118).

Carefully consider the potential damage to your reputation and advancement opportunities if you come in with sunburn after a “sick” day or are seen shopping or otherwise out and about while “sick” (p. 119).

- ♦ *Flu:* Stay home rather than risk infecting your co-workers (p. 119).
- ♦ *Menstruation:* Be careful not to use all of your sick time for menstruation days (p. 119).



- *Dental problems:* because it is difficult to talk all day with a sore mouth, perhaps your supervisor can put you on the email queue for the day. If the dental problems persist, you should seek care rather than lay the burden of your dental pain on your co-workers (p. 120).

### **Calling in sick:**

Do this as early as possible — preferably at or before your scheduled start time. Try to speak personally with your team leader (p. 121). Be sure to place your own call rather than having someone else call on your behalf (p. 121).

### **Discussion question**

What do you do when you run out of money towards the end of the pay period and it affects your ability to get to work?

### **Getting to work**

Budget carefully so that you have enough money to pay your transportation costs toward the end of your pay period (p. 121). This is not the time to ask for more money — budget your income properly (p. 121).

## **Experiential Exercises or Assessments**

Students make a list of the reasons for which they have called in sick within the last 2 years. Students try to recall the approximate number of days missed due to each reason. In this way, students identify the biggest reason they miss work. Students also recognise and measure the total time lost due to each condition. Are absences due to one condition excessive? Students discuss their lists in small groups (3-4 students), and help each other evaluate the appropriateness of each absence and the amount of time lost for each condition.

<b>Creative Instructor Notes</b>	Encourage student honesty, which will lead to vulnerability in this exercise. Be sure to create a “safe space” in the classroom for such honest, vulnerable conversations, where students know they won’t be judged or criticised for their absences. Encourage students to help each other see when a certain absence type is excessive, reminding them that it is better that this information come out in the classroom than from their team leader.
<b>Homework</b>	Students identify their biggest challenge in good attendance. After identifying their biggest challenge, students strategize on how to overcome that challenge.
<b>Takeaway Message</b>	Good attendance is important. Sick days are there for a reason. Use them wisely.

## Test Bank

1. If you are feeling burnout it is best to:
  - A. Take sick leave.
  - B. Schedule some recreation leave.
  - C. See if it is possible to try a different shift pattern.
  - D. Quit.
  - E. **B & C.**
  
2. If you run out of money at the end of your pay period and have trouble affording transportation to work, the best approach is to:
  - A. Call in sick.
  - B. Ask for a raise.
  - C. **Learn to budget better.**
  - D. All of the above.
  
3. Which of the following is NOT mentioned as an important reason for good attendance?
  - A. The burden of your absence falls on your co-workers.
  - B. Your reputation depends on it.
  - C. **It is important that you feel your utmost for quality service.**
  - D. All are mentioned as important reasons for good attendance.
  
4. Excessive sick leave can lead to:
  - A. Stress for co-workers.
  - B. Longer wait times for customers.
  - C. Loss of business.
  - D. Waste of marketing activities.
  - E. **All of the above.**
  
5. True or false: If you are sponsored by a welfare agency you have to inform them of your pay rate and start date.
  - A. **True.**
  - B. False.

# Adherence to Schedule



## Chapter Overview

Chapter 14 covers the importance of adhering to the scheduled break times. Slight flexibility is expected, but persistent non-adherence causes many problems.

## Chapter Objectives

By the end of this chapter, the successful student will be able to:

- Articulate the importance of adhering to the schedule and the reasons why;
- Explain how to calculate schedule adherence;
- Articulate the causes and impacts of non-adherence.

## Key Terms and Topics

### Introduction

“Call centres schedule staff on the phones in a manner that reduces customer wait times and the probability of abandoned calls (where the customer hangs up after waiting too long in the queue)”(p. 123). “Most call centres measure ‘adherence to schedule’ and agents may have a target such as 90% adherence, meaning that their activities must be the same as rostered at least 90% of the time” (p. 123).

“Your personal level of adherence to the schedule directly impacts on customer satisfaction, the centre’s service level, and the workload of your team mates” (p. 123).

### *Discussion question*

How do you think they come up with this percentage of adherence?

### Calculating adherence to schedule

It is important to adhere to the schedule and to take your breaks exactly at the scheduled time whenever possible. However, sometimes calls take longer than anticipated and you have to go on break later than scheduled. This potential delay is factored into the ‘adherence to schedule’ targets, and the reason why call centres do not expect 100% adherence to the schedule—most aim for 88-95% adherence (p. 124).

“Here is a simple calculation for this scenario: If, excluding your unpaid lunch break, you are scheduled to work 7.5 hours a day, this is 450 minutes a day. You adhered to the roster for 432 minutes of the day because you had three instances of being out of adherence for six minutes each. When you go on your break three minutes late this is considered six minutes out of adherence: three minutes at the start and three minutes at the end.  $6 \times 3 = 18$  minutes.  $450 - 18 = 432$  minutes.  $432/450 = 96\%$ ” (p. 124).

“If you are on your last call a few minutes before a break, then click ACW while on the call to prevent another call coming in. This should allow you to complete the call and any resulting After-Call Work (ACW) without running too much over the scheduled break start time” (p. 124).

Be sure to be familiar with the various phone modes so that you can use the proper one when you need to leave your seat (p. 125).

Also be familiar with what the call centre considers “exceptions”. This is where an event influences your schedule, and thus your adherence score (p. 125).

***Discussion question***

What do you think are some of the usual causes of not adhering to the schedule?

**Low adherence score causes**

Arriving late, leaving early, using phone modes that block calls, returning late from training and meetings, taking breaks when you feel like it and missing breaks entirely will all damage your adherence score (pp. 125-126).

Your calls should not be notably longer than your team mates’ calls (p. 126). If they are, seek guidance from your team leader (p. 126).

***Discussion question***

What do you think are the implications or results of low adherence scores?

**Low adherence score impacts**

Low adherence scores increase your team mates’ workloads because you are not available to take calls when you are supposed to be (p. 127). Call quality will likely decrease (p 104). Customer service is negatively impacted, as customers have longer wait times and increased abandoned calls (p. 128).

	<p>“So, you can see the importance of adherence to schedule. Adherence to schedule means being available to take calls when you are scheduled to so the centre is accessible to customers, the workload is evenly shared and a high level of customer service is maintained” (p. 128).</p>
<p><b>Experiential Exercises or Assessments</b></p>	<p>Use the Adherence to Schedule Worksheet (App. 19, p. 172) and the explanation of how adherence is calculated (pages 123-124 of <i>How to Survive (&amp; Thrive) in a Call Centre</i> text. Students work together in groups to make their calculations, answer the questions and double-check each other’s work. Answers are: 1. 83%, 2. 83%, 3. 90%, 4. Best to wait until team leader returns to approve, 67%.</p>
<p><b>Creative Instructor Notes</b></p>	<p>In their groups, have students discuss strategies for ensuring they adhere to the schedule and the impacts of not adhering to the schedule.</p>
<p><b>Homework</b></p>	<p>In a short reflection, discuss the implications of long calls. Use the impacts given in the text and add one or two more that you can think of.</p>
<p><b>Takeaway Message</b></p>	<p>It is important to take your scheduled breaks at exactly the scheduled break time or as close to exact as you can. The call centre system functions like a well-oiled machine when all of the pieces are working properly. A breakdown in one area, such as not taking breaks when scheduled, causes adverse effects in other areas.</p>

## Test Bank

1. Which of the following will NOT likely lower your adherence score?
  - A. Beginning work early.
  - B. Beginning work late.
  - C. Taking no breaks.
  - D. **All will likely lower your adherence score.**
  
2. Most call centres aim for approximately a \_\_\_\_% adherence rate.
  - A. 80
  - B. **90**
  - C. 95
  - D. 100
  
3. If your calls are consistently longer than your team mates' you are probably:
  - A. Providing better service.
  - B. Chatting too much with the customers.
  - C. **Not meeting the goals of the business.**
  - D. All of the above.
  
4. In calculating adherence rate percentages, which unit of measurement is used?
  - A. **Minute**
  - B. Hour
  - C. Day
  - D. Week
  
5. Each of the following is an impact of low adherence scores EXCEPT:
  - A. Team is more prone to burnout.
  - B. Call quality decline.
  - C. Increased customer dissatisfaction.
  - D. **All of the above are impacts.**



# Call Centre Stress



## Chapter Overview

Chapter 15 discusses call centre stress. Most call centres do what they can to keep employee stress levels low. There are also many things you can do for yourself. This chapter explains the usual causes of agent stress and offers tips and techniques for reducing stress.

## Chapter Objectives

By the end of the chapter, successful students will be able to:

- Articulate the usual reasons for call centre stress and the options for reducing such stress;
- Discuss several options for managing and reducing stress.

## Key Terms and Topics

### Introduction

“Call centres have two intertwined measures (metrics): **Service Level** and **Abandon Rate**. Service level is the percentage of calls answered within a set timeframe...Abandon rate is the percentage of calls that are not answered; it is presumed that the majority of these calls are customers who hang up while waiting in the queue, as the **wait time** was too long” (p. 129)

“Most call centres do their utmost to keep abandoned calls low and service level high in order to satisfy customers and not lose any potential business” and schedule staffing needs accordingly (p. 129).

When abandoned calls are continually high, agents on all shifts over several months will have little-to-no available time, when they are not on a call. Rather, agents are 100% occupied with handling calls when not on break (p. 130). This leads to agent exhaustion and customer frustration with long wait times, deteriorating the level of customer service overall (p. 131). The only ways to resolve this situation are to increase staffing or use automation technology (p. 131). If your call centre does not intend to adopt either of these resolutions, it may be time to look for another job (p. 131).

#### *Discussion question*

Let’s talk about targets for a minute. What are targets? Why should they not be a source of stress?

### Targets

Targets are designed to direct and motivate agents towards meeting the organisation’s goals. They are usually matters within your control, such as performance, attendance, and possibly sales, and are based on industry standards and customer expectations (p. 132). Do not stress about them.

#### *Discussion question*

How can you tell when you are stressed?

## Identifying stress signs

High absenteeism, poor performance, colleague conflict, and other destructive behaviours can be indicators of personal stress. Identify the source of the stress and take steps to resolve or reduce it (p. 132).

### *Discussion question*

What are some things you can do to reduce your stress levels and keep them low?

## Stress management

Tips for managing stress:

- Sleep: get enough (p. 132).
- Diet: plan your meals, and eat a healthy diet (p. 133).
- Rest and Exercise: Integrate personal time and exercise time into your day (p. 133).
- Hydrate: drink water throughout the day (p. 133).
- Breaks: use them! Get away from the call centre floor, the further, either mentally or physically, the better (p. 134).
- Be positive: do not dwell on the occasional rude customer (p. 134).
- Celebrate your successes: spend more time celebrating your success and that of your colleagues than complaining (p. 134).
- Organise: keep your desk as tidy as possible and use personal record-keeping systems to organise your life and thus reduce stress (p. 134).
- Unnecessary worrying: do not worry about that which is beyond your control (p. 134).
- Stretching: the sedentary demands of call centre work can create aches and pains, so be sure to exercise regularly and stretch often (p. 135).

	<ul style="list-style-type: none"> <li>• Call centre relaxation programmes: take advantage of the call centre relaxation programmes, which might include yoga and relaxation classes and recreation rooms with activities and furnishings aimed to help you relax (p. 135).</li> <li>• HR Wellbeing programmes: HR departments in large corporations may organise wellbeing programmes that include lectures and activities aimed at improving the wellbeing of their employees. Take advantage of these resources if you have them available (p. 135).</li> <li>• Concentrate on work while at work: Leave your personal problems at the door (p. 136).</li> <li>• Assistance from family and close friends: sometimes it is useful to talk about what is bothering you in order to help you find a satisfactory way to move forward (p. 136).</li> <li>• HR employee assistance programmes: some companies offer counselling service for staff, often called an Employee Assistance Programme (EAP) (p. 136).</li> <li>• Time off: If you are experiencing a major personal problem, it may be best to take some time off work in addition to seeking support (p. 136).</li> <li>• Training and retraining: if work is the source of your stress, more training may increase your confidence, or it may not be the best job for you (p. 136).</li> </ul>
<p><b>Experiential Exercises or Assessments</b></p>	<p>Discussion activity: Put students into groups of 3-4. Have them discuss each of the tips given. Is the student likely to practise such a behaviour? Why or why not? What might the practice of such a behaviour look like? What do the students believe is the most important of the tips given for stress reduction? (Answers may vary).</p>

<b>Creative Instructor Notes</b>	After the small group discussion, have a whole-class discussion. Ask who is already practising or has practised such a technique. Call on these students (1-3 each category) to share what they have done, how it worked for them, whether they personally would recommend it, why or why not, and whether they are still practising this behaviour. In this way, these tips are modelled by peers, increasing the likelihood of personal adoption.
<b>Homework</b>	Students classify the tips given into 3 columns: 1) what is already practised; 2) what is likely to be practised; 3) what is unlikely to be practised. Students then reflect on the 3 columns, paying special attention to column 3, what is unlikely to be practised. They consider why something is likely and more importantly, why they believe something is unlikely to be practised by them.
<b>Takeaway Message</b>	Stress is a natural part of call centre work. Do what you can to alleviate it as much as possible. These efforts at stress reduction are ongoing, and a part of your life.

Test Bank

1. Which of the following is NOT true of targets?
  - A. They are based on industry standards.
  - B. They are based on management expectations.**
  - C. They are intended to motivate agents.
  - D. All of the above are true.
  
2. All of the following are indicators of stress given in the text EXCEPT:
  - A. Overeating.**
  - B. High absenteeism.
  - C. Increased conflict.
  - D. All are given indicators of stress.
  
3. An Abandon Rate is
  - A. The percentage of agents who quit.
  - B. The percentage of customers who hang up without talking to an agent.**
  - C. The percentage of supervisors and managers who walk out.
  - D. None of the above.
  
4. True or false: One way to manage stress well is to devote yourself to the job, arriving early and staying late regularly:
  - A. True.
  - B. False.**
  
5. Which of the following is a good way to celebrate success:
  - A. Share your success with team mates between calls.
  - B. Listen to uplifting music and think about and appreciate how well you have been doing.
  - C. Support your team mates when they make a sale or overcome a problem.
  - D. All of the above are good ways to celebrate success.**

# Complaint Customers



## Chapter Overview

Chapter 16 covers how to handle customer complaint calls. It moves through every step of the process, from establishing what the complaint is, to possible follow-up calls at the end, and includes points on how to manage these sometimes challenging customer situations.

## Chapter Objectives

By the end of this chapter, successful students will be able to:

- Explain the process of handling customer complaints;
- Articulate any particular perspectives they will need to exercise in effectively managing customer complaints.

## Key Terms and Topics

### Introduction

“In most cases, the reasonable complaint customer and the irate, abusive customer have the same thing in common: they have a problem with your organisation’s product or service. Always remember that complaint customers are giving the organisation you work for a second chance, whereas most dissatisfied customers will switch to a competitor rather than raise a complaint. So use this opportunity to try and retain the customer” (p. 137).

#### *Discussion question*

In dealing with customer complaints, what is the first thing you will need to do?

### Establish what the complaint is

“Allow the customer to tell the story about why they are so upset, and actively listen to the customer’s complaint without interrupting. Use the occasional mmm, I understand, I see, to show that you are listening and giving the customer your full attention” (p. 137).

Be sure not to interrupt. It is important to allow the customer to “vent” (p. 138). If the customer is having difficulty expressing his or her dissatisfaction, help guide the conversation with careful questions (see p. 138).

#### *Discussion question*

Do you think you should take notes while taking a customer complaint? If so, what should be in these notes?

### Take notes and clarify

Take notes about the customer’s situation. Include key information points. Once the customer has completed telling the story, paraphrase it back to him or her for the purposes of clarifying the customer’s concern and preventing further difficulties (p. 138).



***Discussion question***

What sort of responses do you think the customer is looking for from you? In other words, what listening stance can/should you adopt? What mental position can you adopt for yourself?

**Display empathy**

After establishing the problem, show the customer empathy to demonstrate that you understand why the customer is concerned. This is done by acknowledging the customer's point of view, and displayed through your words and tone of voice. This does not mean accepting blame or agreeing with the customer, just that you understand the customer's frustration at the situation (p. 139).

**Reassure the customer**

Make the customer comfortable that you are listening and taking the matter seriously. This is done primarily with phrases demonstrating your desire to help (see p. 139). When you need to put the customer on hold, reassure them that you are investigating how to resolve the matter (p. 139). If it appears the company erred, you might ask the customer what resolution s/he would like to see (p. 139).

**Keep calm**

From the beginning and throughout your call, keep your voice volume at a normal level and your tone of voice calm (p. 140).

***Discussion question***

When you have a solution, how do you convey that to the customer?

### Rectify the problem

“Once you have investigated the problem, inform the customer how the problem seems to have arisen. It is best to apologise for the frustration/anger/concern that has been caused. Never blame the customer” (p. 141). Continue to display empathy (p. 141). If the customer remains dissatisfied after you have offered your solution and no alternative solution can be offered, escalate the call to your team leader (p. 142).

#### *Discussion question*

Can you think of any reason why you might want to actually thank the customer for complaining?

### Thank the customer for raising the complaint

When customers complain, they give you an opportunity to keep their business. Also, they shed light on areas that may need improvement (p. 142). Thus, be sure to thank the customer for letting you know about the problem (p. 142).

#### *Discussion question*

What do you do with callers you cannot help?

### Escalating complaints to your team leader

“Customers are usually happy to be escalated to a supervisor, so if you are unable to resolve the problem to the customer’s satisfaction it is best to escalate the call to your team leader. Speak to your team leader first to provide them with the customer’s name, customer account number, if relevant, and background about the complaint including the solutions that you have already proposed to the customer” (p. 142).

“Call centres will usually have some guidelines about what sort of calls should be escalated” (p. 143). “Even if you deal with the complaint to the customer’s satisfaction completely by yourself, it is best to tell your team leader about it” (p. 143). “Ensure that you document the complaint in the customer database by making adequate call notes” (p. 143).

### *Discussion question*

In what sorts of situation might it be necessary to make a follow-up call? What do you need to do at your end to make sure this is not overlooked and the customer is helped if you are absent?

### **Follow-up calls**

Some situations may require a follow-up call. “If promising the customer a follow-up call, make sure you use the available systems in your centre for logging call backs. This prevents you forgetting about the promised call and, depending on the system, it may also allow others to see and action the call if you are not in the office or are on other duties” (p. 143).

### **Experiential Exercises or Assessments**

- Using the Empathy Exercise (App. 20, p. 174) students are to write responds to the customer service / complaint written scenarios showing appropriate empathy
- Distribute the Complaint Practice Worksheet (App. 21, p. 176). The scenarios on the worksheet are common customer complaint reasons. Pair students, sitting back-to-back. One student is the agent, the other is the caller. The caller chooses from the typical complaints provided and makes a call. The agent goes through the process of handling the customer complaint on two levels: **Complaint Customer Practice Part I:** Students practise customer problem solving scenarios using CER (Clarify the problem, Emphasise with, and Reassure the customer). CER involves working with the customer. **Complaint Customer Practice Part II:** Students complete the dialogues using RT (Resolve the problem, and Thank the customer). This is what the agent needs to do for the customer. Upon completion, students change pairs, switch roles, and repeat, this time using either the complaint options given or one of their own devising. At the end, debrief (what was hard, easy, how do you feel about handling complaint calls, etc.)

<p><b>Creative Instructor Notes</b></p>	<p>Seek 2 volunteers to model the complaint call procedure for the class after the role play activity is completed. Have the agent intentionally make a couple of errors, as directed secretly by you. Allow the class to recognise the errors when discussing the model after the 2 students have completed it.</p>
<p><b>Additional Reading</b></p>	<p><i>'The Art of Coping with Conflict'</i> by Alison Mathiebe (App. 22, p. 177). Discussion questions for article: why is too little conflict not a good thing? As a call centre agent how can you use conflict constructively?</p>
<p><b>Homework</b></p>	<p>Students write a script for the agent's end of a complaint call, imagining the customer's end. The customer's complaint will be visible in the agent's script.</p>
<p><b>Takeaway Message</b></p>	<p>Customer complaints are part of doing business. There are effective ways of managing customer complaints, and this chapter reveals them in separate steps.</p>

## Test Bank

1. The first step in managing customer complaints is:
  - A. Keeping calm.
  - B. Thanking the customer for the complaint.
  - C. **Determining what the problem is.**
  - D. None of the above.
  
2. The best strategy for resolution is:
  - A. **Doing it yourself.**
  - B. Directing the customer to your team leader.
  - C. Directing the customer to the Manager.
  - D. Directing the customer to the Director.
  
3. Which of the following is NOT a stated benefit of staying calm?
  - A. You can see the situation more clearly if your head isn't clouded with emotion.
  - B. The customer will pick up on your calm and also begin to calm down.
  - C. **Customers are more likely to be more forthcoming if you are calm.**
  - D. All of the above are stated benefits of staying calm.
  
4. Which of the following statement displays empathy?
  - A. **I can see how that would be frustrating.**
  - B. I apologise for our error.
  - C. Since you are upset, perhaps you would prefer to speak with our team leader.
  - D. All of the above display empathy.
  
5. Which of the following is NOT part of the process of resolving customer complaints?
  - A. **Identifying with the customer.**
  - B. Thanking the customer.
  - C. Taking notes.
  - D. Offering reassurance.

# Abusive Customers



## Chapter Overview

This chapter covers how to manage abusive customers. It includes the reasons customers generally become abusive, and techniques you can use for keeping your cool in these challenging conversations.

## Chapter Objectives

By the end of the chapter, students will be able to:

- Explain why customers become abusive;
- Articulate the techniques agents can use when dealing with abusive customers;
- Demonstrate awareness of when to escalate the call.

## Key Terms and Topics

### Introduction

“If the customer is complaining about the product, billing, delivery or anything except your phone manner then their grievance is not against you personally (although it may feel like it). They are not complaining about you, they do not know you, and as they do not know you it is very unlikely that they could have feelings of hatred towards you” (p. 145).

“Remember that the customer associates the company you work for with you and the other customer service staff they have had contact with rather than the CEO . You have the power to undo any previous wrongs that have left the customer unsatisfied. Problem-solving and resolving customer complaints can therefore make call centre work interesting, challenging and rewarding” (p. 146)

#### *Discussion question*

The customer is yelling at you... should you argue back?

### Avoid arguing

“Stay calm and do not ever get into an argument with the customer, even if they are shouting and/or swearing” (p. 146).

“When dealing with a complaint you may be shocked by the customer’s behaviour, but your job is to look past this anger and focus on what is causing the customer to behave in this manner and how you can resolve it” (p. 146).

#### *Discussion question*

What can you do to best manage this type of call?

### Keep calm

“Remember to keep your voice volume at a normal level and your tone of voice calm. Shouting, raising your voice, allowing your voice to shake in anger, or arguing with the customer are behaviours that are not only completely unprofessional and inappropriate in a call centre role but they provide the customer with an excuse to continue to complain (this time about you). Allowing yourself to get angry or involved in an argument only increases your own stress levels and decreases your job satisfaction and job performance level” (p. 146).

Keeping adequately hydrated may assist with voice control, and focusing on slow, deep breathing can help keep your stress levels down (p. 146).

You cannot usually hang up on a customer just because she/he is shouting at you. It is better to offer to get your team leader to speak with them (p. 147).

### *Discussion question*

What do you do if the customer asks to speak with the supervisor immediately?

### When a customer demands to speak with a supervisor immediately

Try to find out what the issue is (p. 147). In response to the customer relating the problem, use empathetic phrasing and if you can fix it, let the customer know. If they still want to speak with the supervisor and/or you see from their history that they have tried resolving it through agents before and have been unsuccessful, also escalate the call (p. 147).

If the customer will not tell you what the problem is, try to find out the customer’s name so you can look up the record in the customer database and escalate the call to the team leader (p. 147).



**Discussion question**

What do you do when customers swear at you or are racially or otherwise personally abusive?

**Customer swearing**

Swearing customers are usually expressing their frustration with your organisation. Calmly ignore the swearing, use empathetic phrasing, and explain how you can resolve the problem (p. 148).

If the swearing is too offensive, you do not have to tolerate it. You can give the customer a warning, such as: I can understand your anger and I am trying to help but I can only do so if the swearing stops (p. 148). If the swearing continues, adhere to your organisation's protocols. "Always escalate the call if you are not sure whether hanging up on the customer is allowed, even in an extreme circumstance" (p. 148).

**Racially abusive customers**

Try to remember that the customer is angry with the situation, not you. "It is best to ignore any hateful comments and, as calmly as possible, try to find out what the customer's product or service problem is and then work on fixing this" (p. 149). "You are the person who has been hired due to your communication and customer service skills, so ignore hateful comments, remain calm and try to assist the customer. If this is not effective, escalate the call to your team leader" (p. 149).

**Discussion question**

What should you do after a bad phone call?

**Debriefing**

"If the call was a disaster in spite of your best efforts... discuss with your team leader what happened, and ask if there was a better way of handling the call" (p. 149). "If you are upset by a customer and feel that you can't take another call, discuss this with the team leader and take a break" (p. 149).

	<p><i>Discussion question</i></p> <p>What should you do after the incident is passed?</p> <p><b>Replaying the call in your head</b></p> <p>Try not to let the call distract you for the rest of the day or eke into your personal time as you replay it in your head (p 150). Think about what was positive and what could be improved; then forget about the call (p 150).</p>
<p><b>Experiential Exercises or Assessments</b></p>	<p>The ‘I’ Statement Worksheet (App. 23, p. 181) provides a list of ‘you’ statements e.g. ‘you need to calm down otherwise I will hang up on you.’ Students are to rewrite these as ‘I’ statements. Then practise these statements together.</p>
<p><b>Creative Instructor Notes</b></p>	<p>Students recall a time when they got angry and perhaps abusive on the telephone due to an unacceptable good or service. Have them relate the call as best they can recall. What did they say? What did the agents say? What was the resolution? Secondly, students recall a time when they tried to get angry but the person on the other end remained entirely calm. How did the students feel about this interaction? What was the result?</p> <p>The goal is to have students recognise for themselves, due to their own experience, that staying calm benefits everyone.</p>
<p><b>Homework</b></p>	<p>Students are to list three tips to keep themselves calm during complaint or abusive complaint calls. Then share these with each other in the next training session.</p>
<p><b>Takeaway Message</b></p>	<p>Keep your cool when dealing with abusive customers.</p>

**Test Bank**

1. Which of the following should you never, under any circumstances, do?
  - A. Allow the caller to abuse you.
  - B. Argue back.
  - C. Disconnect the call.
  - D. A & B.
  
2. In these conversations, it is a good idea to:
  - A. **Use I statements.**
  - B. Use You statements.
  - C. Offer to get the team leader.
  - D. All of the above.
  
3. What should you do when a customer immediately asks to speak with the supervisor?
  - A. Get the supervisor.
  - B. **Find out what the call is about.**
  - C. Try to help the customer yourself.
  - D. None of the above.
  
4. All of the following are tips for keeping calm EXCEPT:
  - A. Stay hydrated.
  - B. **Stretch during the call.**
  - C. Deep breathing.
  - D. All are tips for keeping calm.
  
5. After the abusive call, you should
  - A. Replay it in your head to think of how you could have managed it differently.
  - B. **Share your story to inform and guide others.**
  - C. Simply keep taking calls.
  - D. All of the above.

# Teamwork



## Chapter Overview

This chapter covers the importance of teamwork in a call centre and the realities of working with other people in a close environment.

## Chapter Objectives

By the end of this chapter students will be able to:

- Explain what different type of team there are;
- List different types of meeting;
- Articulate the social protocols of working closely with others;
- Identify a good solution for dealing with a deficient team leader.

## Key Terms and Topics

### Introduction

Teamwork is an essential part of working in a call centre (p. 151).

#### *Discussion question*

What is a high-performance team?

### High-performance teams

High-performance teams are different from regular teams in that they work towards a single team goal (p. 151).

Sometimes this includes a sales target (p. 151). “Awareness of the goal, and active contribution towards the achievement of the team goal, is crucial” (p. 151).

Team members have the same level of training and competence (p. 152). They also engage in a reflection process to analyse performance and learn from mistakes (p. 152).

“In summary, the factors that set high-performance teams apart are optimal communication, genuinely striving for the same goal, analysing performance and setting improvement goals” (p. 152).

#### *Discussion question*

What sort of attitude is it best for you to approach your co-workers with? What can you do to benefit the general morale of the company?

### Be pleasant

It is important to have respect for management and your fellow team members, and always be pleasant and respectful of individual differences (pp. 152-153). Be sure to thank your team mates when they assist you or help you in any way, and your team leader for support and coaching. Give credit where it is due (p. 153).

## Working closely with others

Due to the close proximity of co-workers in call centres, be mindful of your bodily smells, both of the perfumed and body odour variety (p. 153). Also be sure to adhere to the call centre's rules about eating at your workstation (p. 153).

### *Discussion question*

What is a good way to understand what the company has in mind in terms of a top agent?

## Learning from others

“If you are new to a centre and joining an established team, ask if you can sit next to the strongest performer” (p. 153). However, be sure to ask questions of your team leader, not your co-workers (p. 153).

Making a few mistakes is a normal part of life, so do let your team leader know right away when this occurs (p. 154).

### *Discussion question*

In what ways do you think the work group shares important information?

## Team communication

It is important for everyone to gather in one place from time to time, but scheduling demands prevent this from occurring too often. There are also many other methods your call centre may use to communicate important information (p. 154). These can include email, electronic bulletin boards, softphone panels, pop-up messages onscreen, and more. See pp. 154-155 for this list.

**Huddles:** short team meetings, 10 minutes, regard one issue requiring immediate action (p. 155).

**Buzz meetings:** short meetings intended to refresh and motivate agents (p. 156).

**Sales meetings:** 5-10 minutes at the beginning of sales shift, agents discuss yesterday's results and strategies (p. 156).

	<p><b>Team meetings:</b> formal, with written agenda and designated minute taker. Take them seriously (p. 156). Be sure to volunteer for duties and projects. If you are not assigned to anything, you can volunteer to do a host of tasks, as indicated on pp. 156-159.</p> <p><i>Discussion question</i></p> <p>Can you imagine a scenario where you are having difficulty improving because of your team leader? What would you do?</p> <p><b>My team leader is the problem</b></p> <p>Team leaders have key performance indicators to achieve, including but not limited to call coaching, performance appraisals, updating statistics, taking escalated phone calls and assisting team members as required. If the team leader is falling short in an area, ask for help for yourself in that area and see how the team leader responds (p. 160). The next step would be to go over the team leader's head and bring the matter to the supervisor, but this is always risky for you. There are strategies you can employ, outlined on p. 161.</p>
<p><b>Experiential Exercises or Assessments</b></p>	<p>Using scenarios in the Meeting Worksheet (App. 24, p. 183) have students in groups discuss what the agents would need to bring along to each meeting—what attitude, which physical things, what ideas/contributions could they make. How can the organiser of the meeting ensure that the goals of the meeting are being met?</p>
<p><b>Creative Instructor Notes</b></p>	<p>Have students discuss how much sharing of knowledge would be appropriate in a team meeting. In what ways can a difficult customer situation be shared positively?</p>
<p><b>Homework</b></p>	<p>Think about how to balance communication in team meetings. The best teams tend not to have people who dominate or cliques within the team. How can everyone ensure that there is balanced communication between team members at a meeting? Write down a few points to share.</p>

**Takeaway  
Message**

Remember that you are working in close proximity with others, and be mindful of how your interactions and your scents impact others.

**Test Bank**

1. According to the text, what is a good way to learn from others?
  - A. **Sit next to the team's top performer.**
  - B. Ask colleagues for tips.
  - C. Shadow your team leader.
  - D. All of the above.
  
2. Being mindful of others includes all of the following EXCEPT:
  - A. Not wearing too much perfume.
  - B. Showering before work and after exercising.
  - C. Not eating at your workstation.
  - D. **All of the above are important considerations.**
  
3. When your team leader is the problem, it is best to:
  - A. Go directly to that person's supervisor with your complaints.
  - B. Schedule a meeting with your team leader and let him/her know his/her shortcomings.
  - C. **Ask the team leader to provide you with personal direction in the area(s) of the team leader's deficiency.**
  - D. Any of the above is a good idea.
  
4. A sales meeting typically takes place:
  - A. Weekly at the beginning of the week.
  - B. Weekly at the end of the week.
  - C. **Daily at the start of shift.**
  - D. Daily at the end of shift.
  
5. Which of the following is NOT true of team meetings?
  - A. They generally occur about once a month.
  - B. **Supervisors and managers are also present.**
  - C. You should volunteer for duties and projects.
  - D. All of the above are true.



# Performance Expectations



## Chapter Overview

Chapter 19 covers expectations of job performance. It includes performance indicators, how to manage personal performance, professional development, and behaviours to avoid.

## Chapter Objectives

By the end of this chapter, students will be able to:

- Explain the key performance indicators and how they are measured;
- Describe how personal performance can be managed;
- Articulate the need for professional development and how it can be achieved;
- Identify performance behaviours to avoid.

## Key Terms and Topics

### Introduction

“It is the role of the team leader to provide ongoing performance feedback, support and training to agents. Agents usually receive performance feedback on a daily basis. The team leader discusses with each agent in their team the statistics and sales results from the previous day as well as any call coaching conducted or customer feedback. In addition, the team leader holds performance appraisal meetings, sometimes referred to as ‘one-to-one’ meetings, individually with each member of their team” (p. 163).

#### *Discussion question*

How do you think they evaluate your performance? On what criteria?

### Key performance indicators

Agents are evaluated on several tangible areas of performance, over which agents have control of their behaviour. These areas often include: adherence to schedule, call quality, sales conversion rates, data entry quality, email and web chat quality, customer satisfaction survey results, and teamwork (p. 164). An agent’s results are compared with targets and performance expectations (p. 164).

#### *Discussion question*

What do you think you can do to manage your own personal performance?

### Managing personal performance

“Agents can manage their personal performance by being aware of and acknowledging performance requirements, identifying ways to achieve the performance expectations, and then, at one-to-one meetings with the team leader, realistically evaluating performance and attitude and identifying opportunities for improvement” (pp. 164-165).

Bonuses are often paid based on achievement of individual and team targets, and agents should be able to personally reflect on the level of customer satisfaction within their own calls (p. 165).

*Discussion question*

What is professional development and why is it important?

### Professional development

Your professional development is also a focus for the one-to-one meetings. This is an opportunity to set long- and short-term learning goals. Professional development opportunities might include formal or informal training, further coaching on calls and responding to customer emails, personal study, or working on another queue type or in another department. Agents should research the professional development opportunities available to them (p. 165-166).

*Discussion question*

What are some things you should refrain from doing?

### Performance do nots

There is a long list of behaviours to avoid on pages 166-170. Most have to do with professionalism and integrity. If you do any of these things, you can expect it to come up in your performance evaluation as an area needing improvement.

### Experiential Exercises or Assessments

Pair students. One is the team leader and the other is the agent. This is a performance evaluation simulation/testing of the chapter material. The team leader asks the agent the following questions: *What are key performance indicators and what have you done to meet them? How have you managed your own personal performance? What have you done for professional development? Which behaviours have you avoided?* The goal is to have students go through the chapter as if it were their own behaviour rather than words on a page. Upon completion, students switch partners and switch roles. Be sure that when students switch, they get a new partner with the opposite role.

<b>Creative Instructor Notes</b>	You might have students intentionally give one or two “wrong” answers to allow the team leader to address those areas.
<b>Homework</b>	Of all of the suggestions given in the text, make a list of 10 things you will focus on. These 10 things should be things that are a bit of a challenge for you rather than things you already automatically do.
<b>Takeaway Message</b>	Your performance is measured by several behavioural indicators. You should be aware of what these are and know how to best manage your performance behaviours.

## Test Bank

1. True or false: it is usually considered okay to use the company postage.
  - A. True.
  - B. False.**
  
2. *Further call coaching* falls under:
  - A. Performance do nots.
  - B. Professional development.**
  - C. Managing personal performance.
  - D. Key performance indicators.
  
3. Key performance indicators are all of the following EXCEPT:
  - A. Adherence to schedule.
  - B. Email quality.
  - C. Number of errors in data entry.
  - D. All are performance indicators.**
  
4. All of the following are ways to manage personal performance EXCEPT:
  - A. Being aware of performance requirements.
  - B. Realistically evaluating attitude.
  - C. Reflecting on calls as to whether customers are satisfied.
  - D. Bringing your team leader a coffee each morning.**
  
5. Professional development may include all of the following EXCEPT:
  - A. Personal study.
  - B. Informal training.
  - C. Conducting a survey of your co-workers.**
  - D. All of the above.

# Training



## Chapter Overview

This chapter covers various types of ongoing training, including online training and cross training.

## Chapter Objectives

By the end of this chapter, students will be able to:

- Explain the different types of training and the expectations of each;
- Explain the importance of different types of training to the agent and to the organisation.

## Key Terms and Topics

### Introduction

“To survive in a call centre role it is important that you are willing to learn and want to make an effort to be the best you can be. This involves identifying gaps in your performance and engaging in relevant learning and training to close these gaps” (p. 171).

“Seeking appropriate help from your team leader with systems, products and tricky customer queries increases your own learning, as does attending formal training sessions” (p. 171).

#### *Discussion question*

What is online training? How does it work?

### Online training

Online training involves some scheduled time away from the call centre for you to engage in a self-study training programme (p. 172). If for any reason you are unable to make this training, discuss this with your team leader and make other arrangements (p. 172).

#### *Discussion question*

What is cross training? Why might you be cross trained?

### Cross training

“In a call centre environment, cross training normally refers to being trained to take another type of call” (p. 173).

“Cross training is an opportunity to expand your skill set and become more valuable to your centre and more marketable in the wider employment sector. Taking at least two types of calls also makes the role more interesting for you and reduces any tendency to robotically recite scripting without any enthusiasm” (p. 173).

Being cross trained does not usually mean that your work load increases, but you may take calls from different queues (p. 173). If you are hand-picked to cross train, it is because your team leader believes in you—this is a compliment (p. 174).

<b>Experiential Exercises or Assessments</b>	<p>Divide the class in half. Assign one half “sales” and the other half “customer service”. Have each group brainstorm the requirements for each type of call, and what the training for each call type would reasonably be. Groups each choose one team leader. After the 2 groups have completed their sessions on what their call type requires and what the training for their call type entails, the team leader from each group switches groups and “trains” the new group on the new call type.</p>
<b>Creative Instructor Notes</b>	<p>Instructors should choose the call types the instructor is most comfortable with. Instructors should also listen carefully while the groups are developing their call type parameters and training requirements, and provide corrections and guidance where applicable.</p>
<b>Homework</b>	<p>Reflection: Students reflect on what would be their first choice for a call type and why. In another paragraph, students identify which call type is their least desirable and why. If they believe they would have anxiety with this call type, how would they best address this anxiety if called upon to train for this call type?</p>
<b>Takeaway Message</b>	<p>Ongoing training is an important part of any successful organization. Expect to be involved in online training and/or cross training, and embrace the opportunities these types of training can provide.</p>



## Test Bank

1. If your team leader singles you out for cross training, this is likely an indication that:
  - A. **You are doing well at your current position and ready for the next step.**
  - B. You are the most expendable in your current team thus easiest to move.
  - C. You are ready for an increased work load.
  - D. You are struggling to meet your targets so a change of script might be good for you.
  
2. Which of the following is NOT true of online training?
  - A. It is part of your ongoing training.
  - B. It is often scheduled during your call centre shift time.
  - C. **It is a good opportunity to take a breather from the phones.**
  - D. All are true.
  
3. Which of the following is NOT true of cross training?
  - A. **You will get a heavier call volume.**
  - B. You will take calls from different queues.
  - C. It is an opportunity to learn more.
  - D. All are true.
  
4. True or false: It is often possible to apply for cross training.
  - A. **True.**
  - B. False.
  
5. If you are anxious about cross training, according to the text, you should consider all of the following EXCEPT:
  - A. Asking your team leader about the training provided.
  - B. Requesting further training if you are still not comfortable.
  - C. **Requesting that you not be required to cross train.**
  - D. All of the above are reasonable responses to cross training anxiety



## PART III

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# MOVING UP OR MOVING ON



# Promotion



## Chapter Overview

Chapter 21 covers the specific activities you can do in order to be considered for promotion. The list is long and varied, and can be summarized by demonstrating devotion to your agent role and your organisation.

## Chapter Objectives

By the end of this chapter, students will be able to:

- Articulate many specific activities that can lead toward promotion.

## Key Terms and Topics

### Introduction

You have to actively look for your own opportunities for advancement both within the call centre and beyond (p. 177).

#### *Discussion question*

What are some things you can do to put yourself in the running for promotion?

### Be a contender for promotion

A long list of tips to be a contender for promotion is outlined for you on pages 178-181. Many of the tips involve your conscientiousness and integrity as an employee, and your demonstrated desire to further your skills. These tips include:

- Ensure you are meeting all targets (p. 178);
- Identify areas where you would like to develop your skills (p. 178);
- Inform your team leader that you are interested in projects that expand your skillset (p. 178);
- Work diligently when given an off-the-phone project (p. 178);
- Be conscious of management perception of your work on projects (p. 179);
- If asked to fill in for your team leader or another role, perform all aspects of the role as if it were your own (p. 179);
- After the above opportunity has run its course, retain that level of professionalism (p. 179);
- If assisting with training, be sure you fully and clearly understand what is expected of you (p. 180);
- Attend as much relevant formal training as possible (p. 180);
- Value the time of your call centre manager (p. 180);
- Think carefully before raising a grievance (p. 181);
- Focus on solving problems rather than complaining about them (p. 181);
- Retain an image of reliability and credibility at all times (p. 181);

	<ul style="list-style-type: none"> <li>• Do not complain about others (p. 181);</li> <li>• Read some people-management books if applying for a supervisory role and you have no experience (p. 181);</li> <li>• Consider carefully whether the team leader role is one that you aspire to (pp. 182-183).</li> </ul>
<p><b>Experiential Exercises or Assessments</b></p>	<p>Put students into groups of 3-4. Each group is assigned 5 behaviours from the list given. One student is assigned the team leader role. The other students intentionally breach all suggestions given. When finished, students switch roles (new team leader) and go through another 5 behaviours. The point here is to clarify appropriate behaviours through behaving oppositely.</p>
<p><b>Creative Instructor Notes</b></p>	<p>Gauge the class. Go through as many of these rounds as the class needs/wants. These are usually very fun activities—rule breaking is fun! You decide as the instructor if there are certain behaviours you want them to practise breaching, and how many rounds of these your class is best served by.</p>
<p><b>Homework</b></p>	<p>Identify the three areas from those given in the chapter that will be most difficult for you to perform. Explore these three areas. Why are they difficult for you? What obstacles do these areas present for you? How can you overcome these issues?</p>
<p><b>Takeaway Message</b></p>	<p>There are some very specific things you can do to be considered for promotion. In sum, they revolve around being a devoted agent and employee.</p>

## Test Bank

1. If you want promotion, it is necessary that you do all of the following EXCEPT:
  - A. Be punctual.
  - B. Be kind.
  - C. Be competent.
  - D. **All of the above are important.**
  
2. When being considered for a new position, it is important that you:
  - A. Cross your fingers and hope they give it to you.
  - B. **Do as much preparation as you possibly can.**
  - C. Trust that they will choose the right person for the job.
  - D. Mind your own business.
  
3. If assisting with training, you should:
  - A. **Ask as many questions as you need to.**
  - B. Intentionally ask a ton of questions.
  - C. Just ask a couple of questions so you do not bother them.
  - D. Figure it out for yourself.
  
4. If you are asked to fill in for your team leader, you should:
  - A. Just do what you can to make sure everything runs smoothly.
  - B. **Do all of the team leader's tasks.**
  - C. Continue to do all of the team leader's tasks after you have returned to your usual position.
  - D. Refuse.
  
5. If you want to be considered for promotion, when given an off-the-phone project you should:
  - A. **Continue to work as diligently as you do on the phone.**
  - B. Use this opportunity away from the phone to slow down a bit.
  - C. Refuse, so you can continue to demonstrate your call skills.
  - D. Any of the above is fine.

# Moving On



## Chapter Overview

Chapter 22 discusses the end of your employment and the various ways in which your employment can come to an end: quitting, firing, redundancy. It also discusses how to manage each scenario and prepare for your next step.

## Chapter Objectives

At the end of this chapter, students will be able to:

- Identify the three types of employment termination;
- Explain the differences between the three types of employment termination;
- Articulate strategies for coping with each reality and moving on to the next step.



## Key Terms and Topics

### Introduction

Chances are good you will one day leave your call centre, perhaps for another call centre or another industry. There are three reasons you may leave your position: 1) you quit; 2) your position has been made redundant; 3) you have been fired (p. 183).

#### *Discussion question*

What are some things you will want to think about before moving on to a new call centre?

### Moving to another organisation

If you do not see any opportunities for advancement or other desirable positions potentially available to you in your current organisation, you may wish to seek employment elsewhere. Before you make that leap, you should consider the demands of the new position and whether they are reasonable for you, and whether your resume/CV demonstrates stability based on the length of your current employment. If you have been there less than a year or preferably two, you will need to stay longer at your next position in order to demonstrate employment stability (p. 183).

#### *Discussion question*

What are some things to keep in mind when you want to quit?

### Resigning

Do not burn your bridges at your current place of employment by insulting your employer or the organisation, or not fulfilling proper notice (p. 184). If at some point you would like to return to that place of employment, it will be nice to know that it is a possibility (p. 184).

Always develop a formal resignation letter that includes the date, your final working date, and your title in addition to expressions of gratitude for the training and other opportunities you have received (p. 184).

It is best to resign verbally first, usually to your direct supervisor, and have the resignation letter ready for delivery (p. 184). You should also discuss your final working date with your supervisor at this time (p. 184).

*Discussion question*

What does it mean when you get fired?

### Getting fired

Getting fired from a call centre position may be a blessing in disguise. It may not be the best fit for you (p. 185). If you are struggling to find your next step, seek the assistance of a counsellor or employment counsellor (p. 185).

If you are fired, it is best to stay away from the premises entirely (p. 185).

*Discussion question*

What is redundancy? What are some ways to come back after a redundancy?

### Redundancy

“Redundancies usually occur because of a restructure, company take-over or to cut costs. Unlike being sacked, it is the position that is made redundant rather than the person. So it is not supposed to be personal but it can definitely feel like it” (p. 185).

If you are made redundant, it may be best to take a few weeks off. Redundancies often come as a surprise (p. 185). Do something to treat yourself in the interim, as you prepare for what is next for you (p. 186). Carefully consider your next step (p. 186).

Review and update your CV with key achievements from your last role (p. 186).

Try to maintain regular work hours while working at home. Fill spare periods in the day with exercise and/or relaxation techniques (p. 186).

	<p>Be realistic and patient with yourself as you work through your job search. It may take some time (p. 186). Temporary work can be beneficial in many ways (p. 187).</p>
<p><b>Experiential Exercises or Assessments</b></p>	<p>Small group discussion (3-4 students): <i>Quitting</i>: What would make you quit a call centre job? Would it be different if you had been there for only six months? What strategies can you use when you are looking for a job to find one where you will be happy for a longer period, say one to two years? <i>Getting fired</i>: What kinds of things could you do to get fired? What is a good approach to the situation if you are fired? What should you do next? <i>Redundancy</i>: Under what situations might you be made redundant? Has this ever happened to you? What is a good approach to this situation? What should you do next? What pitfalls should you be careful to avoid?</p>
<p><b>Creative Instructor Notes</b></p>	<p>Put three labels around the classroom: Quit, Fired, Redundant. You can use Moving On Labels (App. 25, p. 184). Students physically move to this location when discussing this type of leave-taking. When discussion is complete, students rotate areas.</p>
<p><b>Homework</b></p>	<p>Make a list of job-acceptance criteria that, when these criteria are met, you will be happy to work there for at least one to two years. Make a list of red flags as well.</p>
<p><b>Takeaway Message</b></p>	<p>When your time at your current position comes to an end, relax and prepare for your next step.</p>

**Test Bank**

1. A redundancy may be a result of:
  - A. Poor job performance.
  - B. Targets not being met.**
  - C. Poor call quality.
  - D. All of the above.
  
2. A redundancy is:
  - A. Not your fault.**
  - B. Your fault.
  - C. Your team leader's fault.
  - D. Your manager's fault.
  
3. After a redundancy you should:
  - A. Look for another job right away.
  - B. Spend some money on yourself.
  - C. Take a few weeks to refocus.
  - D. B & C.**
  
4. What is a good mind-set for you if you are fired?
  - A. This is a stupid company anyway.
  - B. The team leader is an idiot.
  - C. Gratitude for them showing you it is not right for you.**
  - D. I was sabotaged.
  
5. When resigning, you should:
  - A. Verbally resign to your supervisor first.
  - B. Write a formal letter of resignation.
  - C. Not bad mouth your company or anyone in it.
  - D. All of the above.**

# Other Types of Call Centre Work



## Chapter Overview

There is more than one way to work in a call centre, and this chapter discusses some of the less common call centre types. It covers government call centres, telecommuting, and outsourced service provider opportunities.

## Chapter Objectives

By the end of this chapter, students will be able to:

- Identify the various types of call centres;
- Explain the characteristics of each call centre type covered in this chapter.

## Key Terms and Topics

### Introduction

“Many call centres are in private sector companies, but you can also work in call centres in government organisations and in outsourced service providers” (p. 189). There are also sometime telecommuting opportunities (p. 189).

#### *Discussion question*

What do you think it would be like to have a job in a government call centre?

### Government call centres

Government call centres operate very much like private call centres. The difference is in the pay structure, as government jobs do not usually offer bonuses or reward schemes, but do offer job security (p. 189).

In these positions, because there are no bonuses and you have job security, it may be easy to get lazy in your work. Instead, seeking to always improve helps build self-confidence and achieve a greater sense of job satisfaction (p. 190). It also opens avenues for promotions and moves to other departments (p. 190).

Staff facilities are another major difference in government work versus the private sector (p. 190). Private companies might have relaxation rooms with entertainment of various kinds and free snacks. This is not usually the case in government facilities (p. 190). However, government facilities offer generally safe and strictly law-abiding working conditions (p. 191).

#### *Discussion question*

What is telecommuting and what might be the advantages and disadvantages? How might that work in a call centre job?

### Telecommuting

“Hosted virtual call centre technology allows agents to handle customer phone calls and emails remotely from home. These systems also allow call centre team leaders and managers to supervise office-based and home-based staff simultaneously,

whether the team leaders or manager are in the call centre or working remotely themselves. This functionality includes the ability to listen to live calls, listen to pre-recorded calls, take escalated calls, and supervise the real-time activity of agents. Such phone systems provide a high degree of visibility of every agent, every moment, regardless of where they are working from” (p. 191)

There are many considerations for a telecommuting position, such as ensuring your home has a suitable work space and realising that you will be working alone and will be more closely monitored (p. 192). Please see pp. 192-193 for a comprehensive list of considerations for telecommuting work.

### *Discussion question*

What is an outsourced service provider? What would it mean to work for such an organisation?

### **Outsourced service providers**

“Approximately one third of call centres are operated by outsourced service providers. These call centres service customers of other organisations by agreement. The outsourced service provider could handle all of an organisation’s customer contacts or just an aspect such as overflow calls or outbound campaigns. Likewise, the agreement between the outsourcer and other enterprise could be a long-term arrangement or just for a short-term campaign” (p. 193).

There are many reasons a company might opt to outsource its call centre, including the following and more listed in pp. 194-195:

- ◆ To concentrate on core business and outsource customer service (p. 194);
- ◆ To keep costs down (p. 194);
- ◆ To be more efficient and effective (p. 194);
- ◆ To utilise trained and experienced staff (p. 194);
- ◆ To improve service standards (p. 195).

	<p>An agent working for an outsourced service provider may work on multiple campaigns simultaneously or just one (p. 195). These are usually larger call centres, and often offer more opportunities than smaller call centres can (p. 196).</p>
<p><b>Experiential Exercises or Assessments</b></p>	<p>Devil’s advocate: Pair students. Students discuss different call centre types, one at a time. One student points out the disadvantages of the call centre type while the other student defends this call centre type and tries to convince the devil’s advocate that this is a good option for call centre work. When students move to a new call centre type, i.e. from government call centres to telecommuting, they switch roles. To round out the discussion, students also discuss traditional call centre employment in the same ways. Upon completion, ask students if their preferred call centre type has changed since the beginning of the exercise.</p>
<p><b>Creative Instructor Notes</b></p>	<p>Half-way through or when the exercise is complete, students change partners and continue. This provides breadth and depth of discussion points.</p>
<p><b>Homework</b></p>	<p>Make a list of advantages and a list of disadvantages for all three types of call centre work.</p>
<p><b>Takeaway Message</b></p>	<p>Traditional call centres are only one way to do call centre work. Government call centres, telecommuting, and outsourced service providers provide additional options.</p>



## Test Bank

1. Which of the following demands that you have an OHS-compliant space in your home?
  - A. Government call centres
  - B. Virtual call centres**
  - C. Outsourced service providers
  - D. All of the above
  
2. In which of the following can you expect to possibly answer calls for multiple organisations simultaneously?
  - A. Government call centres
  - B. Virtual call centres
  - C. Outsourced service providers**
  - D. All of the above
  
3. Which of the following is true of telecommuting
  - A. You do not need to hire a babysitter for your young children.
  - B. You are watched more closely than when working in an actual call centre.**
  - C. You will have to provide your own broadband service.
  - D. All of the above are true.
  
4. All of the following are reasons a company might outsource its call centre EXCEPT:
  - A. To improve service standards.
  - B. To decrease costs.
  - C. To focus on other areas of the business and hire out customer service.
  - D. All of the above are reasons a company might outsource its call centre.**
  
5. Which of the following is NOT true of government call centres?
  - A. They provide solid job security.
  - B. They do not have a break room.**
  - C. There are no bonuses.
  - D. All are true of government call centres.

# Is There a Career Path in Call Centres?



<b>Chapter Overview</b>	This concluding chapter discusses what you can do in the job market with call centre experience.
<b>Chapter Objectives</b>	By the end of this chapter, students will be able to: <ul style="list-style-type: none"><li>• Identify possible positions after call centre agent;</li><li>• Explain why call centre work is beneficial in the job market;</li><li>• Describe the areas of skills you will develop in call centre work.</li></ul>
<b>Key Terms and Topics</b>	<b>Introduction</b> <p>“Contrary to many media reports that portray call centre work as a dead-end job, I would say that there definitely are career opportunities in call centres” (p. 197).</p> <p>Ongoing call centre training develops many marketable skills (p. 197). Many opportunities are available to those with call centre training (p. 198).</p>

	<p>It is a good job to start or restart your career because you can rapidly develop skills (p. 199).</p> <p>“Call centres can provide you with opportunities to develop and be successful” (p. 199).</p>
<b>Experiential Exercises or Assessments</b>	<p>Class discussion: Where would you like to go within the call centre? What sorts of opportunities do you see as available to you? What types of industry would you like to work in? What kind of agent role would you like to have? Can you see yourself advancing from the agent role? In which direction? What would be your ideal job? What sort of training would you need to get there? How can your agent role help prepare you for your ideal job?</p>
<b>Creative Instructor Notes</b>	<p>You can have this discussion as one large group, or split the class into smaller groups as you like. Keep in mind that the larger the group, the fewer people will participate, leaving all of the talking to a few. However, the larger the group, the more cohesive and targeted the discussion.</p>
<b>Homework</b>	<p>Make a list of the types of industry that would be most ideal for you, and the kinds of agent role within those industries that you would most like to have. Take steps to seek that sort of employment. (For existing agents you may want to omit this homework if your goal is to retain them)</p>
<b>Takeaway Message</b>	<p>It may not look like it on the surface, but call centre work develops many career opportunities.</p>

## Test Bank

1. Call centres are good places to start or restart a career because:
  - A. They pay well.
  - B. There are many opportunities for advancement.
  - C. They provide many opportunities to develop your skills.**
  - D. All of the above.
  
2. Which of the following is NOT a reasonable step after call centre employment:
  - A. Regional sales manager for a major corporation.**
  - B. Human resource officer.
  - C. Marketing officer.
  - D. All of the above are reasonable steps after call centre employment.
  
3. From agent, it is most reasonable to advance to:
  - A. Supervisor.
  - B. Trainer.
  - C. Team leader.**
  - D. Any of the above
  
4. Agents develop skills in all of the following EXCEPT:
  - A. Customer service.
  - B. Business writing.
  - C. Team work.
  - D. Agents develop skills in all of the above.**
  
5. Call centre work is a good job because:
  - A. There are many industries with call centres, increasing your opportunities for employment within the industry.
  - B. You receive a lot of training that can be applied to many industries.
  - C. It is easy to advance.
  - D. A & B.**

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# APPLICATION APPENDIX

## APPLICATION APPENDIX

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## Worksheet 1

## Call Centre Roles Card Activity

*Print and Cut Out*

<b>INBOUND CUSTOMER SERVICE AGENT</b>	<b>INBOUND CUSTOMER SERVICE AGENT</b>
<b>INBOUND SALES AGENT</b>	<b>INBOUND SALES AGENT</b>

<b>INBOUND SALES &amp; CUSTOMER SERVICE AGENT</b>	<b>INBOUND SALES &amp; CUSTOMER SERVICE AGENT</b>
<b>OUTBOUND TELEMARKETING AGENT</b>	<b>TEAM LEADER</b>
<b>TEAM LEADER</b>	<b>TRAINING OFFICER</b>



<b>WORKFORCE MANAGEMENT / SCHEDULING SPECIALIST</b>	<b>CAMPAIGN CO-ORDINATOR</b>
<b>SUPERVISOR</b>	<b>QUALITY SPECIALIST</b>
<b>CALL CENTRE MANAGER</b>	<b>CALL CENTRE DIRECTOR</b>

# Introducing Yourself at an Assessment Centre—Feedback Sheet

*Students are to practise a short presentation about themselves, pretending that they are job candidates to a call centre at an assessment centre. Trainers can use this sheet to provide students with feedback on their practice presentations.*

- ♦ Was the information the candidate provided when introducing herself/himself suitable for an assessment centre?

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- ♦ Was the information ordered in a way that was understandable?

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- ♦ Voice projection—could the audience (assessors and other candidates) clearly hear?

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- ♦ Was the pace of the candidate's speech appropriate?

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- ◆ Did the candidate make eye contact with the audience members (assessors and other candidates)?

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- ◆ Did the candidate connect with the audience?

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- ◆ Did the candidate appear comfortable?

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- ◆ Did the candidate seem credible?

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# Behavioural Interview STAR Worksheet

*Tell me about a time when you handled a customer complaint*

<b>Situation or Task</b>	What was the situation or task that needed to be completed? Use a specific scenario e.g. One day a customer required...
<b>Action</b>	Describe what action you personally took
<b>Result</b>	What was the result? Was the customer happy with the outcome?

## Worksheet 4

## Customer Requirements Worksheet

*My ideal employer is \_\_\_\_\_*

*Imagine you are working for this company when answering the following questions:*

1. Who are your customers? Are they from a particular area or demographic?

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2. What are customers expecting from the organisation you work for?

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3. What level of service do they expect?

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4. How can the products and services offered meet customers' needs?

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5. What are common customer criticisms and how can you overcome these?

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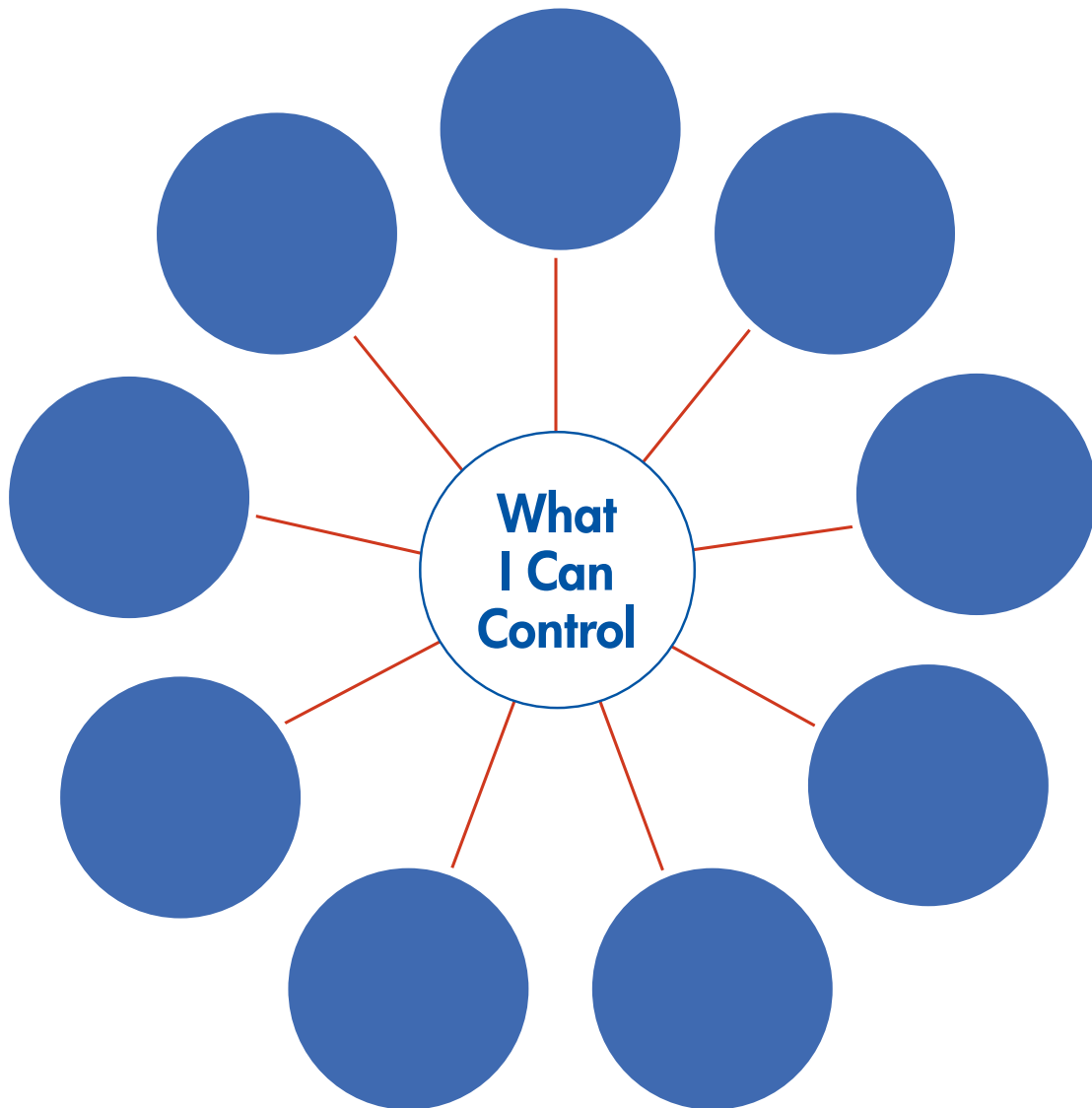
6. How can you personally help customers?

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# What I Can Control Worksheet

*Call centre agents can have an enormous impact on the way customers perceive the organisation. As a call centre agent what performance areas can you control?*



# Customer Service—Role Play Activity

## Scenario 1

Bookworm Library Services sources books for libraries from publishers. Bookworm also puts library barcodes and plastic wrap protection on the books before shipping them to the libraries. Sam works at Lakeview Library. Sam calls Bookworm as Lakeview Library has received their latest order from Bookworm but the barcodes seem to be incorrect. The order includes a new bestselling book. The library already has a waiting list of people wanting to borrow that book.

### Call Flow for Bookworm Library Services

Use standard greeting: *“Welcome to Bookworm Library Services; this is \_\_\_\_\_.  
How may I help you?”*

Listen to customer’s opening request.

Ask questions to clarify what the customer needs (if necessary).

Paraphrase customer’s request to confirm your understanding and gain agreement from customer: *“Just to summarise: Your order that arrived last week has incorrect bar codes. So that needs to be fixed and you need this resolved quickly as customers are already on a waiting list for some of the books. Is that correct?”*

Take note of customer’s name and library or ask for it if not volunteered.

Indicate you are willing to help using a positive statement such as: *“Thank you for calling us about this problem Sam. I can resolve it for you.”*

Use questions to gather information needed to handle the enquiry, establish any further needs, build rapport and tailor your recommendations.

Keep the customer informed. If you need to put them on hold ask for permission *“I need to look into that for you. Do you mind if I put you on hold?”*

Sound professional and speak clearly. Do not mumble and try to minimise ...*umms* and ...*errs*. Use a positive and empathetic tone of voice.

Summarise what you have done or will do for the customer: “*So Sam, I have...*”

Wait for the customer’s acknowledgment.

Ask: “*Is there anything else I can help you with today?*”

Give your name again at the end of the call (helps customer to feel confident that you will correct the error).

End the call positively: “*Thank you for your call today.*”

**After completing the first role play use the call flow to role play the next two caller scenarios.**

## Scenario 2

Emily from Greentown Library calls Bookworm Library Services. Greentown Library has received two lots of a recent order. A parcel arrived last Friday with a complete order, but then another parcel arrived on Monday with the same order duplicated. This is an error made by Bookworm Library Services. Emily the librarian says that actually now that they have two copies of *The Amazing World Atlas* they would like to keep the second copy, but Greentown Library does not want the other books that arrived on Monday.

## Scenario 3

Paula, a librarian at Coal Point Library, calls Bookworm Library Services. Paula wants to order in a book for the library that she saw recommended in the latest copy of *Library Review*. She is looking at Bookworm Library Services’ online ordering system for libraries but cannot find this book. As this book is already on the best seller lists it must be available to bookstores. Paula is out of sorts and wants to know why the book isn’t available on Bookworm’s online ordering system.



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### Customer Service Role Play—Observer Checklist

1. Use the organisation's standardised greeting.
2. Listen to the customer's opening request or problem.
3. Indicate that you are willing to help.
4. If it is not volunteered, ask for the customer's name.
5. Paraphrase the customer's request.
6. Ask permission to gain more information (where applicable).
7. Use questions to:
  - a. *Establish needs;*
  - b. Gather the information needed to handle the enquiry accurately;
  - c. Build rapport;
8. Tailor your recommendations.
9. Keep the customer informed.
10. Sound professional and speak clearly.
11. Summarise what you have done or will do for the customer.
12. Wait for the customer's acknowledgment.
13. Ask: *Is there anything else I can help you with today?*
14. Give your name again at the end of the call.
15. End the call positively.

## 'So You Can' Worksheet

*Customers are interested in product benefits—what is in it for them. You can link product features with their benefits by using 'SO YOU CAN' phrases.*

Here are some examples:

- The baby's cot has removable sides **SO YOU CAN** use it as a junior bed once your baby becomes a toddler.
- Our Italian course has a free trial lesson **SO YOU CAN** see if it the course is right for you before paying for anything.

Create some SO YOU CAN phrases below:

The television has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The car insurance policy has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The organic moisturiser has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The phone has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The bank account has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The pizza has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The insect repellent has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The glasses have \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The protein shake has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The book is about \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The shoes have \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

.....

The car has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The dentist offers \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The newspaper has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The chocolates have \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The diet plan has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The tax agent offers \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The air-conditioning unit has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The refrigerator has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The lunch box has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

The pram has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

\_\_\_\_\_ has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

\_\_\_\_\_ has \_\_\_\_\_ SO YOU CAN \_\_\_\_\_

# Sales Approach Worksheet

*Use this worksheet to consider and practise different ways of approaching sales.*

## Sales Approach Number 1: This product does X without Y.

A good outcome or result the customer can get (the X) without what is normally considered necessary (the Y).

Example: *This camera takes amazingly clear pictures **without** you needing to know any of the technical details of photography.*

This diet plan \_\_\_\_\_ without \_\_\_\_\_

This bank account has \_\_\_\_\_ without \_\_\_\_\_

This course \_\_\_\_\_ without \_\_\_\_\_

This workout \_\_\_\_\_ without \_\_\_\_\_

This \_\_\_\_\_ without \_\_\_\_\_

This \_\_\_\_\_ without \_\_\_\_\_

## Sales Approach Number 2: Peace of Mind

How the product will provide the customer with a sense of calm.

Example: *This ski helmet offers superb protection. Purchasing a helmet for your child **provides you with peace of mind**, knowing that you are doing all you can to help ensure a safe experience while she/he is enjoying the slopes.*

This life insurance policy \_\_\_\_\_ provides you with peace of mind

\_\_\_\_\_

.....

This payment option \_\_\_\_\_ provides you with peace of mind

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This school \_\_\_\_\_ provides you with peace of mind

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This \_\_\_\_\_ provides you with peace of mind

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This \_\_\_\_\_ provides you with peace of mind

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### Sales Approach Number 3: The truth about X is

The benefits that the customer may not be aware of, where they may not know the full story or have previously been misled.

Examples: *The truth about insurance is that most people are either under or over insured; that is why we ask these questions, in order to understand what you really need and then provide you with the best solution and price.*

*The truth about bone china is that you can put it in the dishwasher and it won't scratch as long as you use a liquid dishwashing detergent.*

For training purposes make up some phrases below, but when speaking to real customers 'the truth' does of course need to be TRUE.

The truth about language courses is \_\_\_\_\_

The truth about vitamins is \_\_\_\_\_

The truth about acne treatment is \_\_\_\_\_

The truth about dog training is \_\_\_\_\_

The truth about diets is \_\_\_\_\_

The truth about \_\_\_\_\_

The truth about \_\_\_\_\_

.....

# Inbound Sales—Role Play Activity

## Sales Call Scenario 1

You are working in a call centre for Protect Car Insurance. Jenny calls as she has received her car insurance renewal notice from her current insurer and is shopping around to see if she can get a cheaper price.

Jenny has a late model Toyota Corolla, has a good driving record and has not made any car insurance claims in the last 5 years.

Protect Car Insurance company may not be necessarily cheaper than Jenny's but Protect offers repairer of choice in case of an accident or damage. The policy also includes free roadside assistance service in case of a breakdown.

Before doing the role play prepare some 'SO YOU CAN' statements to link feature and benefits. Then add these to the script below

## Inbound Sales Role Play 1

AGENT: Welcome to Protect Car Insurance. This is \_\_\_\_\_.  
How may I help you?

CUSTOMER: Hi, my name is Jenny. I've received my insurance renewal from ABC Insurance and I'm just shopping round to see if I can get a better deal.

AGENT: Thank you for calling us, Jenny. I can give you a quote now and we will see how that compares with ABC. I will just need to ask a few questions to give you an accurate quote. Is that ok with you?

CUSTOMER: Yes, that's ok. But I do need to pick up my children from school soon.

AGENT: This will only take a couple of minutes.

CUSTOMER: Oh that's ok.

AGENT: What kind of car do you have, Jenny?

CUSTOMER: It is a 2015 Toyota Camry station wagon.

AGENT: Are there any extra features that you paid for when you purchased the car?

CUSTOMER: Yes it is automatic, has air-conditioning and roof racks.

AGENT: Great, I'll take a note of that. Roof racks are really handy, aren't they?

CUSTOMER: Yes, my son is in a kayak club and we carry his kayak on top of the car.

AGENT: Oh wow! Do you live near the water?

CUSTOMER: Yes we live at Blues Point; it is a lovely area.

AGENT: That must be really serene. That's my next question actually for the quote. What is your street address in Blues Point?

CUSTOMER: It is 202 Pencil Street. We live opposite a school so that's why the street has a funny name.

AGENT: (Chuckle) Pencil Street is a cute name. Do you have a garage, Jenny, or is the car parked on the street?

CUSTOMER: We have a garage and always park the car in there when we are not using it.

AGENT: Jenny, have you made any car insurance claims within the last 5 years.

CUSTOMER: No thankfully not.

AGENT: You must be a good driver.

CUSTOMER: I think it is more luck. Sometimes you can't avoid an accident.

AGENT: That's true. OK Jenny, other than a good price is there anything in particular that you are looking for in a car insurer?

CUSTOMER: Well I haven't really thought about it.

AGENT: Did you know that Protect Car Insurance offers \_\_\_\_\_  
\_\_\_\_\_ so you can \_\_\_\_\_.

CUSTOMER: Aha, that sounds good.

AGENT: Also, Protect offers \_\_\_\_\_ so you can \_\_\_\_\_.  
You can have peace of mind knowing that \_\_\_\_\_.

So let's summarise: for a 2015 automatic Corolla Camry Station wagon with air-conditioning and roof racks the quote is \$575. How does that sound to you?

CUSTOMER: It is about the same as ABC but I like the idea of having the road side assistance as well. So yes, I would like to go ahead with the quote. But I do need to leave now to pick my kids up.

AGENT: That's fine, Jenny. I will save the quote under your name and if you like I could call you back this afternoon to finalise the policy for you. Once again it will only take an extra couple of minutes.

CUSTOMER: Ok, that would be good. You can call me at 4pm. So it is Jenny Booth and my number is 456-7891.

AGENT: 4567891. Is that correct?

CUSTOMER: Yes.

AGENT: I won't keep you any longer, Jenny. Thank you very much for your call and I will ring you back at 4pm to finalise everything.

CUSTOMER: Great. Thank you, bye for now.

AGENT: Goodbye Jenny.

## Sales Call Role Play Scenario 2

You are working in a call centre responding to infomercials on television. Stephanie calls: she has just seen the Amazing Abs infomercial and is interested, but has further questions.

The Amazing Abs package is a set of 4 DVD workouts that work the core abdominal muscles.

It comes with a 30-day workout calendar so you know when to do each DVD.

Customers will receive a login to Amazing Abs Support. This is online access to motivational videos to encourage you to do the program.

The package is \$49.95

Before role playing this scenario make some SO YOU CAN statements to link feature and benefits and create a basic call flow.



# Outbound Survey—Role Play Activity

## Scenario

Greentown Theatre Company are conducting a survey. They are calling customers who have previously bought tickets to their productions to ask what shows they would like to see in the future. This allows them to assess market demand and also clean up their database (check that the customer details they have are still valid and correct).

## Outbound Script

CALLER: Ring Ring...

Potential Survey Respondent: Hello

CALLER: Good afternoon, is that Mrs Smith? Hello Mrs Smith, this is \_\_\_\_\_ from Greentown Theatre Company. We are calling our customers today as we are planning for our next theatre session and wanted to get your input into what musicals you would prefer to see. We just want to make sure that we are putting on shows that our customers will love. Do you have two minutes to complete a quick survey about which musicals you may like to see?

POSSIBLE RESPONSES: Yes, I loved the Sound of Music Singalong production you did in May; that was great fun / I was very disappointed in your Sound of Music production. My seat was in the third last row so I could barely see anything/ How did you get my number? / I tried to get tickets to your Sound of Music event but they were sold out. My daughter was crying when I told her that we couldn't go/ Ok, but it must be quick. I have to leave for an appointment/ I have just lost my job so can no longer afford to go out/ I do not have time now. Can you call back another time?/ You need to speak to my husband. He is the one who likes musicals but he is at work now/ I bought the tickets for my auntie. Musicals aren't really my thing.

CALLER: *respond to customer's answer and then if applicable proceed to questions.*

The whole point of this survey to find out what kinds of musical you would like us to put on.

OK, so the first question is:

- 1.** Which musical would you prefer to see?
  - a.** The Lion King
  - b.** Cats
  - c.** Mama Mia!
  - d.** Miss Saigon
  
- 2.** Which would you rather see?
  - a.** An afternoon matinee at the weekend
  - b.** Evening show during the week
  - c.** Evening show at the weekend
  
- 3.** Which would you prefer?
  - a.** To buy tickets online
  - b.** To buy tickets in advance from the box office
  - c.** To buy tickets an hour before the event from the box office
  - d.** To buy tickets by filling out a form and posting it in to us

Thank you very much for completing the survey. Once we have tallied the results and decided which musical we are going to put on, can we send you a brochure? (If yes, check name and address details.)

Once again, thank you for your time and feedback.

## Worksheet 11

# Outbound Appointment Setting— Role Play Activity

## Scenario

Triple B radio station are running an outbound appointment setting campaign. They are calling local businesses to let them know that their advertising package is now cheaper than ever. The business development manager, Martin Edwards, is available for appointments with customers who are interested in learning more about advertising on Triple B and how this could help their business.

## Script

CALLER: Hello it is John here from Triple B radio station. Can I speak to Penelope Matthews in your Marketing Department?

POSSIBLE RESPONSES: Yes John, it is Penelope speaking. How can I help you?/  
Penelope is in a meeting right now. Can I take a message and have her call you back?  
/ Penelope is on holiday/ Penelope doesn't work here any more / I am Jenny Smith,  
Penelope's executive assistant: how can I help you?

CALLER: (*respond and where applicable continue*) Penelope, we would love to inform you about our latest advertising package. It is cheaper than ever before and our clients are telling us that advertising on Triple B is generating a lot of new customer leads for them. Is your organisation interested in generating new customer leads?

POSSIBLE RESPONSES: Yes, of course but radio advertising is probably too expensive for us/ Naturally/ Yes, but I can't make any advertising cost decisions; you need to speak to Philip, our Marketing Director/ Yes, but we have already booked all our promotions for this year/ John, we already do quite a bit of advertising online and in the local press. I am not sure if advertising on the radio would be effective for us.

CALLER: (*respond to the customer's response and where applicable proceed with one or both of the following statements*) Advertising on Triple B allows you to reach people while they are driving to work or driving to do the shopping. Our business

development manager Martin Edwards can explain to you how it is possible to target your potential customers very effectively by advertising on Triple B.

*or/*

If you are currently already advertising in other local media such as the newspaper, radio can be a very powerful enforcer. The potential customer reads your newspaper advertisement and then a morning radio ad reminds them about your offer.

CALLER: Can I organise an appointment for Martin Edwards, our business relationship manager, to come and explain more about the benefits of advertising on Triple B, including our new cheapest ever pricing packages?

POSSIBLE RESPONSE: yes, ok then/ That would be good. I am free next Thursday morning/ How much is it then? It is pointless for him to come if we can't afford it/ We are really busy now so I do not have time for an appointment.

*If the response is yes, arrange time/date and take note of address and any directions.*

*If the response is no, offer to send out more information in the form of a brochure package. If the response to this offer is yes, confirm name and postal address details.*

CALLER: Thank you for your time, Penelope.

## Worksheet 12

# Outbound Sales & Customer Service— Correction Activity

## Scenario

David has seen a special offer advertised by Beautiful Beach travel. The offer is for a one-week stay at Paradise Beach. David and his family are excited about the idea of a beach getaway but the price advertised is for a standard room. David and his wife have three children under 10 years of age. David called to see if extra bedding or a larger room is available. The representative at Beautiful Beach said that she would check with the hotel and have someone call him back.

## Script

AGENT: Hello, this is Susan from Beautiful Beach travel. Is David there?

CUSTOMER: I'm David, Thanks for calling me back. I was talking to your colleague Rachel earlier today. We would like to take up your special offer for Paradise Beach advertised in your flyer but we need a family room to fit two adults and three children. Rachel didn't have the details about whether there were family rooms available?

AGENT: Oh I see. I will have a look on the computer... (*customer hears keyboard tapping noise*).

AGENT: Are you still there?

CUSTOMER: Yes.

AGENT: Well, there is a larger room in the hotel. It has a king-sized bed plus a trundle for one person plus a sofa bed. If that's not big enough, you could book two interconnecting rooms.

CUSTOMER: How much is the room with the trundle and sofa bed?

AGENT: It is \$120 per night for a six-night/ seven-day stay.

CUSTOMER: Mmm.. That does increase the price quite a bit compared to the standard room advertised.

AGENT: Yes well, it is a bigger room, so it costs more.

CUSTOMER: I will have a think about it.

AGENT: Ok, the offer expires at the end of this month or earlier if all rooms are booked.

CUSTOMER: Good to know, thanks.

AGENT: You are welcome, have a nice day.

CUSTOMER: You too, goodbye.

What did Susan do well on this call?

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List three things that Susan could do differently to improve her customer service:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

List three things that Susan could do differently to improve her sales:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Email Correction Worksheets

## EMAIL SCENARIO 1

Hi Mrs Mills,

Expedition Transport Service has a delivery for you from Comfy Homewares. Delivery will be in the next 1-3 working days. For details of which items are being delivered, please see the attached document.

Best Regards,  
Sophie Jones  
Expedition Transport Service  
Phone: 0147 258 369

Dear Sophie,

Thank you for your email.

I have actually paid extra for delivery at a specific time so that I can arrange for someone to be home. Can you let me know what day and time the delivery will be?

Best Regards,  
Joanne Mills

Hi Joanne,

That's right, you have chosen the Delivery Plus option. This means someone will call you within the next two days to arrange either a morning or evening delivery on a day that is convenient for you.

Hope this helps 😊

Best Regards,  
Sophie Jones

*Review Email Scenario 1*

Was email the best way to respond to this customer?

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How would you improve the customer service provided?

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**EMAIL SCENARIO 2**

Dear Alex,

I hope your holiday went well. I am writing to confirm whether you want to go ahead with your order of the Ladis Table. We have your order on hold until the end of this week.

Best Regards,  
John Saddington  
123 Furniture  
1800 528 369

Dear John,

Thanks for your message. Thanks for all your help but I have decided to cancel the order. I have found another table in a local store that is similar in price and quality to the Ladis and the delivery is free so that is saving me some money. Can you please refund the payment made to my credit card?

Best Regards,  
Alex Beadman





### Email Scenario 3

Dear Sparkling Clean,

I booked a cleaner to clean my apartment on the 3<sup>rd</sup> of May. The cleaner seems to have cancelled on the day as I got an email from you on the 3<sup>rd</sup> that a replacement will be organised. No one came on the 3<sup>rd</sup> which is a bit annoying as I had arranged to stay home that day to show the cleaner what I wanted done. This is the first time I have used your site and I just booked a one-time clean. I really do need a cleaner so how do I organize a new appointment using the payment which I have already made?

Thanks

Sally Walters

Customer Number: 42563

Dear Sparkling Clean Customer,

You have done the right thing by contacting us. Let us know by email or phone (instead of on the website) when you would like to make the new appointment. We will set this up in our system for you and see if a cleaner is available to do the job. Just letting you know that there are only 4 cleaners in your area so it may be best to call so we can tell you the days that they are available. You can also receive a 10% discount off your next clean for using the refer a friend voucher attached.

Best,

John

Sparkling Clean

1800 521 487

### Review Email Scenario 3

What mistakes have been made in this email to the customer?

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### Email Scenario 4

HI LAURA, EMILY AND STEVE

CUSTOMER JASON MICHAELS—CM # 256435 CALLED THIS MORNING HE ONLY RECEIVED PART OF HIS ORDER AND IS REALLY ANNOYED!!!!

HE RECEIVED 2 WHITE STORAGE BENCHES 7412 BUT THE CUSHIONS THAT ARE PART OF THIS PRODUCT WERE MISSING FROM BOTH BOXES HE RECEIVED!

CAN YOU RECTIFY THIS ASAP!

THANKS

JANE

### Review Email Scenario 4

How could have this email to internal customers (staff in another department) have been better written?

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Why is it important to consider how emails to internal customers are written?

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# Cost of Poor Quality Worksheets

Most call centres conduct quality checks of email responses as well as calls.

Poor quality can result in **cancellations and returns, customer complaints and multiple calls from customers**. Draw lines to match these three issues with the negative effects that they could have on the business.

**Cancellations  
and returns**

**Customer  
complaints**

**Multiple  
calls from  
customers**

## Effects of Poor Quality Calls or Emails on Business

- An increase in calls if the customer needs to call more than once to have something resolved
- Compensation costs, e.g. a discount or gift as an apology
- Costs associated with crediting and closing accounts
- Costs associated with handling returns
- Could result in negative word-of-mouth recommendations and negative publicity
- Due to the increase in unnecessary service calls the centre's call volume forecast is inaccurate, and the service level target\* may not be achievable, creating a poor service experience for all customers
- Escalated calls to team leaders and management, extra work and additional call costs
- Increased telephony costs
- Loss of business or potential business
- Loss of market share
- Rework costs to correct errors
- Stress for agents handling complaint calls
- Subsequent need to increase staffing to handle extra calls
- The need for customer acquisition activity to replace lost business
- Where there is a high volume of complaint calls, agent may burn out and provide deteriorating levels of service to all customers

\*See pages 203-204 of How to Survive (& Thrive) in a call Centre for an explanation of Service Level and Call Volume Forecast

# Call Centre Technology Worksheet

*Print and Cut Out*

<b>Automatic Call Distributor (ACD)</b>	<b>Contact Management System (CMS)</b>
<b>Knowledgebase</b>	<b>Interactive Voice Response (IVR)</b>
<b>Predictive Dialler</b>	

# Call Coaching Role Play Activity

## Scenario:

Customer has her groceries delivered from an online food delivery service 'MyGrocery-Planet' once per week every Wednesday morning. She is using the online service to save time. This week she forgot about the delivery and was out of the house on Wednesday morning. The delivery driver left a card saying that the box can be picked up from a shop in the next suburb after 6:45pm. This didn't suit the customer, who works in the evenings as a nurse in a hospital. She picked up the food the next morning when the shop was open at 10am. As the box had not been refrigerated several products such as the meat had to be thrown out. The customer is calling to complain about this experience.

**The agent's problem-solving options are:** to record a note in the contact management system instructing the driver to leave the grocery box with a neighbour if the customer is not home. Another option would be to change the delivery day to one where the customer will definitely be home. Deliveries are made on weekday mornings between 8am and 12noon or on Wednesday and Thursday evenings between 7pm and 9:30pm

## Activity

Work in group of three to role play a call using this scenario—One person is the agent, one the caller, and the third is the call coach. The call coach can use the Phone Manner Checklist on pages 69 -73 of *How to Survive (& Thrive) in a Call Centre* and use this as the call coaching checklist. At the end of the call the call coach provides feedback to the agent. Swap roles and repeat until everyone has had a turn at being the call coach.

## Extended Call Coaching Role Play Activity

*Continue the 'MyGroceryPlanet' Call Coaching role play with some more challenging customer situations.*

### **Angry Customer**

The customer keeps complaining how the partner store is too far away and not convenient for picking up deliveries from. The customer thinks it is ridiculous that the pickup time is after 6:45pm when normally the delivery driver comes around 11am. Obviously the food is going to spoil in this time (The agent can explain here that the driver drops off all the undelivered packages to the only partner store in the area once he has finished his work day which is at approximately 6:45 in the evening. The box has special insulation in it to keep the products cool but it is not refrigerated.)

### **Talkative Customer**

The customer is talking at length about her neighbours—they are elderly and are often grumpy and complaining about trivial matters. She is not sure if they would accept her packages or turn the driver away.

### **Repeats Questions**

The customer is confused about the alternative delivery day/time options and asks for this information several times.



## Worksheet 18

# Additional Reading:

How Call Coaching Helps You to Become More Confident,  
by Alison Mathiebe

*In this article Alison Mathiebe, author of 'How to Survive (& Thrive) in a Call Centre', explains how call coaching accelerates your learning, helping you to become more competent and therefore more confident.*

*Discover 10 tips to put the call coaching confidence/competence loop into practice*

There is a learning curve to every new job, particularly if you are a call centre agent. Every company has a unique set of procedures and quality standards the agent must learn to adhere to. Although there are a number of ways to learn, call coaching is a unique opportunity to rapidly build competence, confidence and success in the call centre.

### Why do call centres conduct call coaching?

Call coaching is part of an ongoing training program for agents. It involves a team leader or **quality assurance** specialist listening to a sample of your calls (either live calls or ones that have been recorded) and evaluating your performance on these calls against the centre's call handling procedures and quality standards. At the end of this process, you are provided with coaching feedback on where your performance met expectations and where it needs improvement.

The primary rationale for call coaching is to ensure the agent is meeting customer expectations and to improve customer satisfaction, sales and loyalty. Another reason call centres conduct call coaching is because coaching accelerates the learning of the agent, which helps agents to become competent and successful faster.

## Learning faster through a third party

Think of the feedback from a call coach as the supercharged fuel you need to accelerate up the learning curve. The coach observes your performance, evaluates all of the elements of the interaction with the customer, and then provides clear feedback about what action(s) will improve the quality of future calls. Being coached is more effective than just thinking “how did I feel about that?” at the end of the call because having a third party observer helps you to identify potential blind spots in your performance.

Coaches are simply a feedback mechanism to help you see aspects of your performance that need additional attention and practice. The learning happens rapidly because the evaluation from the coach is based on your performance in a live situation with real-life implications.

Coaching feedback can also increase your motivation to improve, further accelerating your learning process. Research has found that high quality engagement at work is characterized by three conditions; clear and proximate goals, immediate feedback and the perception that the level of challenge is just greater than the level of skill. Call coaching helps you define clear and proximate goals in subsequent calls by giving feedback about how to align performance with company procedures, quality standards and industry best practices. Furthermore, call coaching provides you with immediate feedback on performance, which triggers motivation to try again and improve.

## Growth Mindset

Having a Growth Mindset is perhaps the most critical factor in benefitting from call coaching. Over 30 years of research has demonstrated that learning is profoundly impacted by the learner’s mindset, described as one’s beliefs about talent, intelligence, challenge and failure. People with a Growth Mindset believe talent and intelligence are developable traits. They see challenges such as call coaching as valuable and essential opportunities for learning and growth. For these people, learning is accelerated because they view failure not as an absolute truth about their ability or lack thereof, but as information about how to improve. Therefore, the quality of the coaching experience is largely dependent on your deeper beliefs about whether or not your skills are developable and can improve.

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## Confidence-Competence Loop

One of the most crippling emotions in any job, especially as a call centre agent, is fear. Fear can be caused by a number of factors, but perhaps the most challenging to fix is a lack of confidence. For some, call coaching can have the negative effect of decreasing an agent's confidence by pointing out any number of areas for improvement or delivering feedback in an overly critical manner. Psychology researchers have identified the confidence-competence loop as an important mechanism of the mind to improve confidence. The idea is that as you develop competence—the knowledge of how to do something through frequent practice—your confidence in your ability to do that thing is then strengthened and increased. For example, a new call centre agent can increase his/her confidence in handling customer calls by repeatedly practising the techniques and procedures of the job. With deliberate practice comes a sense of competence, which increases confidence.

Having a Growth Mindset, being open to feedback and practising a coach's suggestions will lead to more competence and this in turn leads to more confidence. The more you are able to use the information received from call coaches and practise their suggestions, the more you will improve the quality of your calls and develop competence. With more competence, the better your performance will be, and as a result the more comfortable and confident you will feel handling customer enquiries.

## Putting it into Practice

Here are 10 tips for putting the confidence/competence loop into practice:

Know the Basics	<ul style="list-style-type: none"> <li>• Know your call centre's call handling procedures and quality standards well.</li> <li>• Ask for a written copy if this hasn't been provided to you or you have mislaid it.</li> <li>• Ask to hear model calls</li> </ul>
See the Big Picture	<ul style="list-style-type: none"> <li>• Understand your company's mission and how it relates to company procedures, quality standards and customer needs.</li> </ul>
Know the Scoring Method	<ul style="list-style-type: none"> <li>• Know your centre's call coaching scoring method.</li> <li>• Know any safety nets for new staff, such as a reduced call coaching quality score KPI in the first weeks after induction training.</li> <li>• Participate in peer coaching to improve your understanding of how the calls are assessed.</li> </ul>
Growth Mindset	<ul style="list-style-type: none"> <li>• Be open to learning and have some faith that you will be able to improve the quality of your calls.</li> <li>• Call coaching feedback is a reflection of the skills you displayed on a particular call.</li> <li>• Use feedback as information on how to change and improve.</li> </ul>
Practice	<ul style="list-style-type: none"> <li>• Try to put into action the call coaching feedback suggestions you receive.</li> <li>• Practise the recommended phrasing but make sure these are not empty words by listening for customer cues (what are they getting at) and acknowledging these and any grievances.</li> <li>• Focus on practising to improve a particular skill, e.g. questioning to determine customer needs or choosing the most appropriate product benefit to present to the customer.</li> </ul>
Take Initiative	<ul style="list-style-type: none"> <li>• Tell your coach how you felt the call went and ask them a question such as: "I think the call went well, but perhaps there was a better way of handling the customer's objection. Do you have any suggestions?"</li> </ul>
Bounce Back	<ul style="list-style-type: none"> <li>• If you feel demoralised by the call evaluation, ask for the main one or two items that you can focus on improving and write them down.</li> <li>• Calm your emotions and address the thoughts that made you feel demoralised.</li> <li>• Continue to practise.</li> </ul>
Coaches are Supportive	<ul style="list-style-type: none"> <li>• See the person giving you call coaching feedback (team leader, quality officer, trainer) as your coach, there to support you, help you to improve and succeed rather than just to criticise you.</li> </ul>
Celebrate Success	<ul style="list-style-type: none"> <li>• See your progress in your customers' reactions, your sales results and your call coaching scores and <b>celebrate</b> your improvements. In acknowledging your progress you will build your confidence.</li> </ul>
Share	<ul style="list-style-type: none"> <li>• Share how you have overcome call handling challenges with your team mates at team meetings. This helps team members learn from each other and talking about your success will also improve your confidence.</li> </ul>

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**References:**

Csikszentmihalyi, M. (1990). *Flow: The psychology of optimal experience*. New York: Harper & Row.

Dweck, C. S. (2006). *Mindset: The new psychology of success*. New York: Random House.

Mathiebe, A. (2016). *How to Survive (& Thrive) in a Call Centre*. Available from [callcentreknowhow.com](http://callcentreknowhow.com)

Merriam, S. B., Caffarella, R. S., & Baumgartner, L. (2007). *Learning in adulthood: A comprehensive guide*. San Francisco: Jossey-Bass.

## Adherence to Schedule Worksheet

The table below is the first hour of a call centre team's schedule. Use the explanation of adherence to schedule and how to calculate it (pages 123-124 of How to Survive & Thrive in a Call Centre) to answer the questions.

Agent	09:00	09:15	09:30	09:45
Sally	Sales Calls	Sales Calls	Sales Calls	Break
Andrew	Emails	Emails	Emails	Emails
Henry	Sales Calls	Sales Calls	Sales Calls	Sales Calls
Frank	CS Calls	CS Calls	CS Calls	Break
Olivia	Sales Calls	Sales Calls	Break	Sales Calls
Emma	CS Calls	CS Calls	Break	CS Calls
Penny	Sales Calls	Sales Calls	Sales Calls	Sales Calls
Kate	CS Calls	CS Calls	CS Calls	CS Calls
Fiona	Sales Calls	Sales Calls	Project	Project
Jason	Sales Calls	Sales Calls	Emails	Emails

- At 8:55 Henry is in the break room making a coffee. He chats with some colleagues and then logs in and takes his first call at 9:10. What is his adherence to schedule score for the hour?

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2. Frank didn't have breakfast and is really hungry. He goes on his 15 min break at 9:40. What is his adherence score for the first hour?

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3. Olivia is having a good morning: she has made three sales. The last sale was a long call just before her break. Olivia goes on break at 9:33. What is her adherence score for the hour?

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4. Andrew tells Jason that there are lots of unanswered customer emails. To help out, Jason logs off the phones and starts working on emails at 9:10. His team leader is in a meeting but he thinks that she would approve of this as there are no calls waiting. What is Jason's adherence to schedule score for the hour?

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# Empathy Worksheet

*Empathy is displaying to the customers through your words and tone of voice that you understand their perspective.*

*Write below empathetic responses to these common customer concerns. Page 139 of How to Survive (& Thrive) in a Call Centre has examples of empathetic phrasing.*

Customer	Agent Empathetic Response
<p>After this delay I am now worried that I won't receive the dolls' house before my daughter's birthday.</p>	<p><i>I can hear that you are anxious about whether it will get there in time. Let's see what we can do to get the dolls' house to you as quickly as possible.</i></p>
<p>This is the third time I have had to call about this matter.</p>	
<p>It seems that you guys have made a mistake as 99.90 has been deducted from my account when the monthly payment is only 49.95.</p>	



<p>I placed the order two weeks ago but since then haven't heard anything.</p>	
<p>Wow, I'm finally through to someone!</p>	
<p>When I ordered the bed, your site said the product was in stock. Now I have received an email saying that delivery will be in 21 days. That's a long time to sleep on the floor.</p>	
<p>Could the price really have gone up so much compared to last year?</p>	
<p>I have read the instructions several times but they are so confusing. I have no clue what I am supposed to do next.</p>	
<p>It would be easier if you just had this information on your website.</p>	

# Complaint Practice Worksheet

## Complaint Scenario 1

I purchased a pink ski suit in size 8 for my daughter 10 days ago. I have not received it as yet. We are going on our ski holiday this Saturday. I'm worried now that we won't receive the suit in time. Can you check for me if my order has been sent? Perhaps it is best if I cancel the order and buy a suit from a ski store.

## Complaint Scenario 2

Hello, I have received today a reminder to pay my annual fee. I have actually already paid this. According to my bank statement I made the transfer on the 24<sup>th</sup> of January. Can you please check your system and cancel the reminder letters.

## Complaint Scenario 3

I love the look of the white lamp but I need two lamps that match. Why is only one available?

## Complaint Scenario 4

I just received my renewal notice for insurance of my boat. I am completely shocked by the price. It is substantially more than last year. Can you please check it for me? I think a mistake must have been made.

## Worksheet 22

# Additional Reading:

The Art of Coping with Conflict,  
by Alison Mathiebe

*In a call centre work environment we like to think of ourselves (as well as our bosses, colleagues, clients and customers) as rational human beings—people who are dispassionate, objective, and unemotional. The truth is, whether at work or at home, we are human. We all have myriad thoughts, feelings, ideas, moods and opinions each day. And so does everyone around us. It is not surprising, therefore, that when people with different interests, perspectives, needs, desires and agendas are required to interact, conflict can arise. Indeed, much like any ecosystem, the workplace can be thought of as a complex structure of competition and cooperation that is constantly in flux.*

### **Conflict as dysfunctional and destructive**

Many of us might perceive conflict as negative. It takes up valuable time, energy and resources, and sets up a game of winners and losers. At the macro level we might think of conflict as a sign of a dysfunctional organisation (e.g. a workplace that encourages an unhealthy level of competition). At the micro level conflict is usually a case of difficult interpersonal relationships (e.g. personality clashes between work colleagues). Seen through a negative lens, conflict is a pathology to be avoided, managed or mitigated at all costs.

In an organisational setting, managers and employees use various tools to deal with conflict as dysfunction. Some examples include:

Conflict management tools	Examples in the context of a customer call
<b>Confrontation</b>	Confronting an argumentative customer and battling it out.
<b>Physical avoidance</b>	Hanging up on a disgruntled customer.
<b>Appealing to authority</b>	Referring an abusive customer to your manager.
<b>Smoothing</b>	Trying to appease an unhappy customer by looking for common ground and/or acquiescing.
<b>Negotiation</b>	Asking a customer to compromise and meet you half way.
<b>Bringing in a third party mediator</b>	Asking your colleague to join the call and mediate a solution.
<b>Suppression</b>	Pretending that the conflict is not happening and biting your tongue.

Many of these tools and techniques can be effective in reducing and managing conflict within a working environment. However, they are generally time and resource intensive, and may not be the best option when conflict arises with outside parties such as customers.

### Conflict as natural and creative

Consider a different angle. Consider the possibility that conflict is natural. Perhaps wherever human beings with different interests and points of view interact, conflict will naturally arise. What if conflict is not necessarily a sign that something is wrong but rather an essential ingredient for growth and flourishing?

Some psychologists and organisational theorists suggest that conflict is necessary to stimulate new ideas, to nudge people and organizations to recognize and adapt to complex environments, and to generate creativity and innovation. Without different points of view (even those presented most forcefully) we might blindly follow the well-trodden path, make decisions with imperfect information, or fail to test our own assumptions. Without criticism we can remain oblivious to our blind spots. Many democratic systems of government are based on the principle of opposition for this very reason. Because democracies are based on the belief that no one person or body holds all the answers, it is designed to elicit divergent

points of view, to balance different interests, and to challenge the status quo. Conflicting views are an essential part of this system.

## Conflict with Customers

Complaint calls from customers can be an opportunity to reframe conflict situations to hear divergent views, receive valuable information, learn, and be creative. When handling complaint calls you may be shocked by the customer's behaviour, but your job is to look past this anger and focus on what is causing the customer to behave in this manner and how you can resolve it. Complaint customers are giving the organisation you work for a second chance, whereas most dissatisfied customers will switch to a competitor rather than raise a complaint. Use this complaint opportunity to try to retain the customer's business by exploring whether it is possible to meet their needs as well as the needs of the organisation. When faced with conflict try to ask yourself the following questions:

<i>What is the other person's point of view?</i>
<i>Why do they think and feel the way that they do?</i>
<i>What valuable information is this person giving me right now?</i>
<i>What can this person teach me that I do not already know?</i>
<i>How can I use this situation to create something new and innovative?</i>

## Using conflict constructively

Any conflict situation can be reframed positively and transformed towards a positive outcome by following win-win negotiation techniques (Fisher, Ury & Patton (1991)).

### 1. Identify what your goals, interests and needs are.

In conflict situations people are often positional—i.e. they adopt a position and then fight hard for it. For example, a seller might quote a price of \$15,000 for a used car. The buyer might refuse and counter-offer \$12,000. The seller then gives a long list of reasons why the car is worth \$15,000. The buyer provides a list of reasons why \$12,000 is perfectly reasonable. Both seller and buyer find themselves stuck in their positions.

An alternative approach is to focus on interests, not positions. When you find yourself entering into a conflict situation (or a negotiation, debate or heated conversation), put your emotions aside for a moment and think carefully about what it is that you want to achieve. Focus on your goals, interests and needs, rather than a pre-set position. Resist temptations to simply win an argument or beat the other person. Focus on where *you* are now and where

*you* want to be in the near, medium and longer-term future. In short, adopt an interest-based rather than a positional approach to the interaction.

### **2. Find out what the other person's goals, interests and needs are.**

Once you are clear about what it is that you wish to achieve, find out what the other person's goals, interests and needs are. Ask intelligent and direct questions and listen carefully to what lies behind their response. What is it that they really need or want from the situation? Pay less attention to their position and more attention to their interests. Ignore any attempts to bait you into an argument. Calmly and sincerely ask them what they need to have their interests met. Listen for near, medium and longer-term goals that they might have.

### **3. Explore creative ways in which both people's goals, interests and needs can be met.**

Most situations are not zero-sum games. In other words, it is not often the case that there has to be a clear winner and a clear loser. Most of the time both parties can have at least some of their interests met by working together creatively. The trick here is to focus on your and their interests (not positions) and then look for creative ways to bring these interests together constructively.

A useful illustration of this win-win principle involves two sisters arguing over the last remaining orange in the house. Both sisters wanted the orange. Sister A argues that she should get the orange because she is older. Sister B argues that she should get the orange because she saw it first. Neither sister will budge on their position and they end up cutting the orange in half to avoid further conflict. Sister A peels her half of the orange, eats the fruit, and throws the peel away. Sister B peels her half, uses the rind for a cake, and throws the fruit away. If the sisters had taken a little time to discover what their respective interests were, they would have realized that both sets of needs could be met fully and simply through creative problem solving.

## **Conclusion**

Although conflict situations can be uncomfortable, they are also natural consequences of interaction between people with different interests and points of view. Too much conflict can certainly be dysfunctional, distracting, time and resource intensive, and stressful. However, too little conflict can mean that nothing ever changes, that certain voices dominate while others are never heard, and that innovation and creativity are stifled. Therefore, when faced with conflict there is an opportunity to reframe the situation as a valuable source of ideas, a reminder to check your assumptions, and an opportunity to be innovative. In addition, focusing on interests rather than positions opens up an opportunity to creatively explore ways in which both parties' needs can be met.

## Worksheet 23

## 'I' Statements Worksheet

*When interacting with customers, using statements that start with 'you' are not so polite and can make the customer feel that they are at fault. This is likely to exacerbate a complaint situation or perhaps turn a regular service call into a complaint call. Instead use 'I' statements to show that you are taking responsibility and being helpful.*

*Change these statements below from 'you' statements to 'I' statements:*

You Statements	I Statements
You have misunderstood. That is not how it works.	<i>I can understand how the instructions can be confusing, let me explain how this works...</i>
You need to calm down.	
You need to do this next.	
You have called the wrong department.	
You need to call back. The phone line is too bad for me to hear you properly.	
You need your customer number.	
You need to speak up.	
You need to pay your renewal.	
You need to submit your direct debit form.	

You need to stop shouting.	
You need to stop swearing.	
You have called at a busy time.	
You need to pay the bill by the 10 <sup>th</sup> of February.	
You have to speak with someone else about this.	
You have to speak with my supervisor.	
You have got that totally wrong.	
You should read this on our website.	
You should write this down.	
You should call back later.	
You need to apply by the 1 <sup>st</sup> of June.	



## Worksheet 24

# Meetings Worksheet

### Huddle Meeting

Team Leader Joe wants to remind his team that they must ask all the mandatory questions in the call flow before giving the customer a quote. Joe has noticed in call coaching this morning that not everyone is doing that. He has prepared some question phrasing for the team to practise as a group.

### Buzz Meeting

Team Leader Sally conducts a short meeting with her team to congratulate them on their sales results so far this week. She arranges for a member of the team (that she knows practices yoga) to lead the team through some simple stretches.

### Sales Meeting

Team Leader Steve conducts a sales meeting in the morning with his team. Each member is to say how they got on yesterday and what their sales goal is for today.

### Team Meeting

Team Leader Jessica is conducting a bimonthly team meeting. The agenda includes tips on improving questioning technique, product update, team sales update, team quality update, peer coaching volunteers, workstation decoration.

### Team Meeting

Team Leader Becky is using the team meeting time to do some customer service revision training as the team call coaching results indicate that improvement in this area is required.

# Moving-on Labels

*Print and Cut Out*

**QUIT**

**FIRED**

**REDUNDANT**