



## 7 Steps of Creating Memorable Customer Service Moments on the Telephone

*Customer Service Standard: Courtesy ~ Customer Service Step: Greet in a Warm, Sincere Manner*

In many situations, a customer's first interaction with your agency is through a telephone conversation. Below are some helpful tips to provide your customers an excellent customer service experience when on the telephone.

1. Give a warm, friendly greeting. Scripted greetings are not necessary but you should provide the caller with your name, agency name and always remember to thank the caller for their call.
2. Use the caller's formal name until directed to do otherwise.
3. Listen to everything the caller is saying without interruption or abrupt call transfers. Use the intentional listening skills and
4. Avoid the use of phrases such as "no problem" when interacting with customers on the phone. Instead use phrases such as "my pleasure" or "I'm happy to be of assistance."
5. Always ask permission to place a caller on hold. Check back frequently and keep the caller informed of what you are doing to assist them. If a caller is unable to hold, offer to call the customer back.
6. Use a warm transfer method when calls must be transferred. The steps of a warm transfer include: providing the name and extension number of the receiving employee, introducing the caller and reason for the call to the receiving employee so that the caller does not need to repeat this information, and offering to take a message or voice mail if the receiving employee is not available. **Never ask a caller to call back later.**
7. End the call by asking the caller if they require additional assistance or if you have met their need. Be sure to give a fond farewell.

**PRO TIP:** MEMORABLE TELEPHONE CUSTOMER SERVICE CAN TURN POTENTIAL CUSTOMERS INTO ACTUAL CUSTOMERS AND TURN EXISTING CUSTOMERS INTO LOYAL CUSTOMERS.