## PRACTICUM: Becoming an ACE Customer Services Agent

## **PART 1: Call handling skills**

## Objectives:

- To gain more understanding of the ever changing world of Customer Service
- To achieve a better understanding of the importance of the customer's First Impression
- To agree appropriate ways of improving this
- To achieve a better understanding of the Verbal Handshake

# Identifying customer needs, using effective communication techniques

## Objectives:

- To understand the two types of customer needs:
   technical/emotional
- To understand the elements of communication:

tone / body language / words

- To understand the different types of questions
- To understand the importance of good telephone etiquette
- Agree on an action plan

## A.C.E. Action Plan

People become ACE by deciding that is what they will be and the
doing something about it!
What are the steps you will take towards Achieving Custome
Excellence?
My 5 Point ACE Action Plan is:
1
2
3
4
5

Have Fun!

And remember: You are what you decide to be!

 $KEY \rightarrow http://www.rafamoreno.com/Rafa/Key0.htm$ 

## PART 2: Writing an effective email

## Objectives:

- To discuss planning and composing emails
- To suggest effective presentation and mechanical techniques of email.
- To identify good and bad examples of business emails.
- To discuss dos and don'ts points when composing emails.

## **Evaluating your current writing skills**

1.	Because e-mail is intended and	TRUE	FALSE
	expected to be a quick, informal		
	means of communication, the usual		
	rules of grammar, punctuation and		
	style don't apply.		
2.	You can enhance the readability and	TRUE	FALSE
	impact of your e-mail message by		
	using all uppercase (or all lowercase)		
	letters.		
3.	Short sentences indicate intellectual	TRUE	FALSE
	weakness. You are certain to impress		
	readers by writing long heavily		
	punctuated sentences.		
4.	Always save the best stuff for the	TRUE	FALSE
	end. If you reveal the most important		
	information upfront, the reader will		
	have no incentive to finish reading		
	your document.		
5.	Electronic writing is fundamentally	TRUE	FALSE
	different from traditional writing.		

## Proofreading all outgoing emails

Always spell check your email and proofread for errors

 If a emale is writon with speeling mestakes and gramitckal errors, you mite git the meening, however, the messige is not as affective, smoothly redable.

 Poor writing is equivalent to someone speaking with spinach stuck between their teeth. Listener s and readers concentrate on the spinach: not what is being said.

 You want your email to be readable. Type in complete sentences. To type random phrases or cryptic thoughts does not lead to clear communication.

#### **Exercise 1: Spot the mistakes in the following response email**

KEY → http://www.rafamoreno.com/Rafa/Key1.htm

Dear Sir,

Thank you for the email.

I can understand your frustration when trying to place an order and it taking some time for the page to download.

During peak times such as Saturday, there can be issues that can cause your browsing to be slower such as large site traffic on both our server and your Internet Service Provider server.

We are currently investigating this matter and hope to have the issue resolved as quickly as possible.

Thank you again for the email

Thank you for choosing www.site.com.

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## **Exercise 2: Reply the following email of complaint**

KEY → http://www.rafamoreno.com/Rafa/Key2.htm

Dear Site dot com,

I wanted to try and change my method of deposit to debit checking

card if I can because credit card companies are refusing to accept

online purchases with you.

I tried to use your interactive chat line and was just left hanging for

20 minutes after a hello from Emma.

This is getting to be a chore. Can your company help me or should I

try someone else?

Thanks,

Mr. Broadbent

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Exercise 3: Identify the type of customer and reply to this

email of complaint

KEY → http://www.rafamoreno.com/Rafa/Key3.htm

Dear Site dot com,

I have been attempting to obtain a repayment from the above

account for the last week and a half.

This has caused me to spend at least 2 hours on your interactive

help. Send numerous emails (many not even given the dignity of a

reply) and finally send a letter to your MD in Leeds.

It now transpires that you were waiting for details of my bank

account- However it was only constant badgering by me that even

revealed this.

I am now out of pocket both from time spent on the internet and I

have lost interest.

How do you propose to compensate for my losses?

Mt. Broadbent

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## **Email Etiquette Action Plan**

"A customer is the most important part of our Business. He/she is
not dependant on us; we are dependant on them. They are not ar
interruption to our work; they are the purpose of it"
Complete the following steps below, providing a future plan of how
to deal with emails more effectively.
1
2
3
4
5
6

 $\mathsf{KEY} \to \mathsf{http://www.rafamoreno.com/Rafa/Key4.htm}$ 

#### **PART 3: Assertiveness skills**

## Objectives:

- Identify your own behavioural types
- Understand the meaning of assertive behaviours
- Identify the benefits of different behavioural types
- Develop an individual assertiveness toolkit
- Identify how effective you are a listener
- Understand the types of listening and how best to use them
- Gain a clear knowledge of questioning techniques
- To recognise and use "winning language"
- To define complaints
- To explore why we feel uncomfortable at times when handling complaints
- Look at how the complainer can have an impact on our own behaviour
- View anger and how we can deal with it
- Using conflict and responding to ploys
- Use an effective communication tool that can create extraordinary results

## **Handout 1: Assertiveness Questionnaire**

This questionnaire is designed to help you discover how assertively you communicate. Think about your behaviour at work and circle the score, which best identifies you.

BE HONEST!! There are no right or wrong answers.

#### **Section 1**

The scoring for this section is as follows:

- **4** = Always
- **3** = Often
- 2 = Seldom
- 1 = Never

1.	When I'm not happy about a situation I drop hints to other people about	4	3	2	1
	my feelings.				
2.	If I realise the person to whom I am talking to is not listening, I dry up.	4	3	2	1
3.	When I am not sure how to undertake a task, I feel easy asking for assistance.	4	3	2	1
4.	When someone does not agree with what I am saying, I raise my voice to make my point.	4	3	2	1
5.	I feel embarrassed when someone compliments me.	4	3	2	1
6.	I let my boss know when I disagree with him/her.	4	3	2	1
7.	I like to be in control of a situation.	4	3	2	1
8.	When someone takes advantage of me, I find a way of evening the score.	4	3	2	1
9.	When I disagree with someone I give them the silent treatment.	4	3	2	1
10	.I feel guilty when I have to ask others for help.	4	3	2	1
11	. I express my opinion to others in an honest and direct way when it is appropriate to do so.	4	3	2	1
12	. I tell other people when they have done something wrong.	4	3	2	1
13	. If I don't agree with a task that I have been given, I find a way of dragging	4	3	2	1
	my feet over it.				
14	. I prefer to comply with the majority decision, even if it is not convenient for	4	3	2	1
	me.				
15	If one of my colleagues is more knowledgeable than I am I call on	4	3	2	1
	them for advice or information.				

#### Section 2

The scoring for this section is as follows:

- 4 = Agree strongly
- **3** = Agree somewhat
- **2** = Disagree strongly
- **1** = Disagree somewhat
- 16. I can be sarcastic to my **4 3 2 1** colleagues.
- 17. I don't like telling people my
  honest opinion if I think it will
  hurt their feelings.
- 18. I believe I have the right to say 'no' to other people's requests and to negotiate a compromise.
- 19. I am not afraid to be rude to **4 3 2 1** other people.
- 20. My anger tends to be explosive. 4 3 2 1

4 3 2 1

#### How to score

Now enter the score that you have given to each statement in the appropriate box below. Then total each the columns downwards.

1.	2.	3.	4.
8.	5.	6.	7.
9.	10.	11.	12.
13.	14.	15.	19.
16.	17.	18.	20.
Total:	Total:	Total:	Total:

Passive Aggressive Passive Assertive Aggressive

Look at the column where your score is highest. This is the behaviour which is typical of you most of the time.

Then look at your second highest score. This is your back-up style; the behaviour you adopt when you are under pressure or are stressed.

If your first and second highest scores are similar, this indicates that you can adopt either style, depending upon the situation.

#### **Handout 3: Definitions of Behaviour**

#### **ASSERTIVE**

- Expressing your thoughts, feelings, opinions and beliefs in a direct and honest way.
- Standing up for your own rights in such a way that you do not violate another person's rights.

#### **PASSIVE**

- Expressing your needs, wants, opinions, feelings and beliefs in an apologetic way.
- Failing to stand up for your own rights or doing so in such a way that others can easily disregard them.

#### **AGGRESSIVE**

- Expressing your feelings, wants and needs in an appropriate tone, through inappropriate language or setting.
- Standing up for your own rights but doing so in a way that is demeaning, hurtful or offensive to other people.

#### PASSIVE AGGRESSIVE

- Expressing your feelings, opinions and needs in an indirect way which on the surface looks passive (not hostile) but in reality damages the other person.
- Standing up for your own rights in a way that indirectly expresses anger or frustration, such as through sarcasm which sounds humorous but underneath belittles another individual.

## **Handout 4: Assertion self analysis**

Read through each statement carefully and circle the answer that best suits you. BE HONEST!!!

- 1. You are in a restaurant and order a steak medium-rare, but it is served to you well done. You would:
  - a. Accept it without comment because you sometimes like it well dine anyway.
  - b. Angrily refuse the steak and insist on seeing the manager to complain about the poor service.
  - c. Call the waiter and indicate you ordered your steak mediumrare and would like another steak cooked to your requirements.
  - d. Offer to show the chef how to cook a medium-rare steak.
- 2. You are a customer waiting in queue to be served in your busy lunch hour. Suddenly a frail old lady steps in line ahead of you and claims that she is in a hurry. You would:
  - a. Let her stay in front of you since she is already in line and it would be rude to speak out.
  - b. Pull her out of line and in a loud and angry manner make her go to the back.
  - c. Calmly indicate to her that you are also in a hurry and have queued, then point out where it begins.
  - d. Pass a sarcastic remark under your breath saying 'if you were that age you would also be in a hurry'.
- 3. After walking out of a store where you purchased some items you discover that you were short changed by 30 pence. You would:
  - a. Let it go since you are already out of the store and have no proof you were short changed. After all it's only 30 p.
  - b. Go to the manager and argue that you have been cheated by the assistant, then, demand the proper change.
  - c. Return to the clerk and inform him/her of the error.
  - d. Go back to the store and ask the clerk if they did maths at school, exclaim to the clerk that they obviously failed.

- 4. You are in a group discussion at work which includes your boss. A colleague asks you a question about your work, but you don't know the answer.
  - a. Give your colleague a false, but plausible answer so your boss will think you are on top of things.
  - b. Do not answer, but attack your colleague by asking a question you know she/he could not answer.
  - c. Indicate to your colleague you are unsure just now, but offer to give him/her the information later.
  - d. Tell your colleague that he/she is obviously not busy, if they are so interested in your work.
- 5. You are in the middle of watching your favourite television programme when your partner comes in and asks you for a non-urgent favour that could mean missing the rest of your show. You would:
  - a. Do the favour as quickly as possible, then, return to the program to finish watching what is left of it.
  - b. Say 'No way, I am not missing this. You should have asked me earlier'. The finish watching the rest of your programme.
  - c. Ask if it can wait until the programme is over and if so do it then.
  - d. Ask your partner if they can move out of the way of the TV as you find it impossible to see through them.
- 6. A friend drops into your office to say hello and catch up on the latest office gossip, but he's staying too long, preventing you from finishing an important project. Your friend is unaware that he is interrupting your work. You would:
  - a. Let him stay because you don't want to upset him. Then you would finish your work at home that evening.
  - b. Tell the person to stop bothering you and tell him to get out.
  - c. Explain that you need to finish your work and request he visits another time.
  - d. Advise him that you haven't got the time for idle chit chat as some of us have work to do.

#### SCORE INTERPRETATION KEY

In general there are four broad styles of interpersonal behaviours.

Mostly A's = Passive

Mostly B's = Aggressive

Mostly C's = Assertive

Mostly D's = Passive/Aggressive

**A** = The passive style of interpersonal behaviour is characterised by inaction and indecision. People using this tend to be easy to get along with and pleasant, but unwilling to stand up for their rights, for fear of offending others. They are very uncomfortable expressing anger and usually deny or suppress this feeling should it occur. As a result, resentment can easily build under the surface, producing stress and tension.

**B** = The aggressive style is characterised by intrusiveness. People who use this style tend to go after what they want, but are unconcerned about how this will affect others. Their angry dominating manner tends to alienate people who, in time may seek to oppose them. Aggressive individuals are usually suspicious of others and are often on the look out for infractions or violations of their rights. Thus the aggressive style produces stress and prohibits the development of close trusting and caring interpersonal relationships.

**C** = The assertive style is characterised by both fairness and strength. Assertive individuals are able to stand up for their rights, but remain sensitive to the rights of others. People who choose this style are usually relaxed and easy-going, but are honest about their feelings. This is the best style of minimising stress and maintaining long standing intimate relationships.

**D** = The passive/aggressive style is characterised by sarcasm. People who use this style use sarcasm to out their point across. They try to humiliate the person who is on the receiving end of their verbal attack. They lack confidence to be able to raise an objection clearly and concisely and feel that by using sarcasm they can put their point forward, whilst having a bit of a giggle on the way (usually at someone else's expense). They are not usually liked by the majority and are considered too unpredictable.

#### **Guidelines for assertiveness**

- You need to acknowledge and be honest about your own feelings to yourself.
- Adopt a new positive inner dialogue for situations where you need to be more assertive.
- Be clear, specific and direct in what you say. If necessary, keep repeating your message if you encounter objections.
- Ask for clarification, if necessary, when uncertain about something.
- Acknowledge diversion tactics; then again repeat your message.
- Adopt an appropriate body language to back up your assertion.
- Keep calm and stick to the point.
- Always respect the rights of the other person.

#### PART 4: How to become a better listener

## **Listening Skills Checklist**

Use this checklist to show how effective a listener you are when speaking to someone face to face.

Circle the score which best describes you.

The scoring is as follows:

- 4 = Always
- **3** = Often
- 2 = Seldom
- 1 = Never
  - 1. I paraphrase what the speaker has said to check understanding
  - 2. I let the speaker finish what they are saying before replying
  - 3. I disregard the speakers accent
  - 4. I am alert to the speakers underlying feelings as well as the facts
  - 5. I keep my min on what the speaker is saying
  - 6. I summarise my understanding of the conversation
  - 7. I consider the speakers point of view
  - 8. I make encouraging listening noises: *I see, uh huh, yes* etc

#### **HOW TO INTERPRET YOUR SCORE**

To be an effective listener you need to use your mind to encourage open dialogue.

Total your points and write them in the box below:

These statements relate to your understanding of what the speaker is saying.

If your total score for these statements is 23 or more, you are an active listener. You understand what the speaker is saying by concentrating on them and distinguishing their underlying feelings and themes.

If you score 22 or less, you are not as active a listener. You may be distracted easily and may fail to concentrate. A lack of empathy with the speaker may mean that they find it difficult to disclose their thoughts to you. This aspect, could therefore, be improved.

#### Handout 4: How to become a better listener

Look at the areas where you score poorly on the check list.

Try to relate how you listen to real-life situations by completing the following sentences.

Write whatever comes into your head.

There are no right or wrongs answers.

include.....

• I like listening to speakers who..... Ι switch off when someone is talking and they..... • I concentrate on what someone is saying when..... • If I can't have my say in a conversation I feel...... • If I can't understand what someone is saying I...... • I feel nervous listening to someone when..... Habits I find irritating in a speaker include...... When speaking Ι spend someone is most my time..... Things that distract me when someone is speaking

Review your answers to these statements as well as your response to the checklist.

• When someone is speaking very slowly I ......

## Action Plan to becoming a better listener

- What you need to continue doing to be an effective listener:
- What you need to start doing to become a mire effective listener:
- What you need to stop doing to become a more effective listener:

## **Blockages to listening**

- Noisy environment
- Personal problems
- Technical problems
- Distractions
- Accents
- Shyness
- Not knowing the subject of the conversation

## **Handout 5: Types of questions**

How you ask questions is very important in establishing a basis for good communication. By using the right questions you can open the door to both knowledge and understanding.

There are several types of questions that can be used and these are listed below.

#### OPEN QUESTIONS

These questions allow you to obtain information, in that they do not invite a particular answer but open up discussion.

These types of questions begin with:

What? How?

Where? Tell

When? Describe

Why? Explain

#### Advantages:

- Useful to establish all the facts
- Allow people to express their views
- o Build a rapport and show that you are interested
- Help you clarify your understanding
- CLOSED QUESTIONS

These questions generate one response because they are very specific. The response generated is usually 'yes' or 'no'. They are used to confirm agreement/close the conversation.

Here are some examples:

So you need the information today?

Are you happy with that?

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## Advantages:

- o Puts you in control of the situation
- Helps you obtain specific facts quickly
- o Useful for testing understanding and summarising
- Allows you to reach agreements

#### LEADING QUESTIONS

These questions are those in which the answer is implied.

Here is an example:

## You are going to speak to him today, aren't you?

## Advantages:

o Useful for obtaining clarity and understanding

#### Disadvantages:

We don't want to suggest.

## LIMITING QUESTIONS

These Questions are those in which you give the recipient a choice.

Here is an example:

#### Is it a brown door or a red one?

#### Advantages:

o Useful to gain agreement when time is short.

## CHECKING QUESTIONS

Using these types of questions will allow you to check your understanding.

Here is an example:

## Am I correct that we are going to the party this Saturday?

#### Advantages:

 Allows you to check that you are understanding the information without assuming and making incorrect decision.

#### **EXAMPLES**

The most effective way to obtain information from other people is to begin a conversation using open questions, rather than leading or limiting questions. Funnel the information by using closed questions to confirm what has been said.

## **Open questions**

- Why did you change your credit card details?
- Can you explain the problem with your account?

## **Closed questions**

- Is that correct?
- Did it solve the problem?

## **Leading questions**

- This is not the first time you call us, is it?
- You would like me to call your bank for you, correct?

## **Checking questions**

- Is your postcode NW3 7QY?
- Can you spell your surname please?

## **Limiting questions**

- Is it 15 or 50 pounds?
- Would you like to make your deposit now or later?

## Handout 6: Dealing with difficult customers - step by step guide

Below is a step-by-step guide that will help you prepare for a potential difficult call.

#### **Step 1 = Prepare yourself**

Breathe. This is a new customer and you have a 'new pair of shoes' to step into. Remember your purpose, you are here to help the customer, resolve their complaint and rebuild their trust. Recognise any judgements or assumptions that you may have and let them go. Fin out any factual information, such as reading logs that will help support the call.

#### **Step 2 = Connect**

Give the customer a warm and sincere welcome. Work on creating a relationship. Invite and encourage the customer to speak and to share a full description of their fulfilled expectations. 'I want to hear all about the problem so I can determine how to help you.'

#### Step 3 = Listen

Be inquisitive, be focused, be quiet. Notice any background conversation and let them go. Use generative listening (picking up the info that you need). Ensure that the speaker is complete before moving on to the next step.

#### Step 4 = Respond

Acknowledge the complaint.

Acknowledge the upset.

Match the energy.

Repeat back what you have heard using as many of the customer's words as you can – check your understanding of the situation.

Communicate clearly on how you can, or cannot resolve the complaint.

Give suggestion on how you can move forward.

#### **Step 5 = Seek agreement**

This is based upon how you can move forward together. If it is not forth coming return to steps 3 and 4.

#### Step 6 = Complete

Acknowledge the call and the caller.

Recap on agreed conditions.

'I am delighted that I could help you'

'I am pleased we could reach an understanding'

'I am sorry that I was unable to help you on this occasion'

#### IF STILL UNHAPPY...

'Mr/Ms ..., please tell me what you expect from us and I will tell you id I can help you'

Extreme = 'I'm afraid this is all I can do. I there's nothing else, I will have to end the call'

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**Handout 7: Possible ploys** 

**Making threats** = Warning of unwelcome repercussions, if you fail to

agree to the terms on offer, emphasising that the penalties will be

incurred by your side.

**Offering insults** = Questioning the performances of the Company or

your professional competence; criticising the quality of your product

or service.

**Bluffing** = Threatening action without being too specific; making

dubious assertions such as competitors undercutting prices etc.

**Using intimidation** = Keeping you waiting and not letting you

speak.

**Using leading questions** = Asking you a series of questions, which

lead you to declare a weakness in your position – forcing conclusions

from your side.

**Making emotional appeals** = Accusing you of acting unfairly in not

agreeing terms; stressing sacrifices; claiming to be offended.

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**Handout 8: responding to ploys** 

**Making threats – Response** = Tell the other party that you cannot

reach an agreements whilst threats are being carried out. Review

other options available to you.

Offering insults - Response = Stay calm, do not lose your temper

or offer insults in return. Restate your position firmly and lead the

conversation into a more constructive discussion.

**Bluffing - Response** = State the facts and wait for their reaction.

Question all statements in a positive manner.

**Using intimidation - Response** = Recognise that these ploys are

there to make you feel less confident.

**Using leading questions – Response** = Avoid answering questions

where you cannot see the intention behind them. Seek clarification.

**Making emotional appeals – Response** = Affirm your commitment

to resolving the problem. Ask questions to test the validity of the

manipulative claims. Lead the conversation back to the issues.

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## **PART 5: Complaints**

- Implicit complaints: the customer expects us to do something for them that we never said we would do.
- Explicit complaint: we haven't fulfilled something we said we would.

## How to deal with angry customers

- 1. Never be sarcastic
- 2. Do not raise the tone of your voice
- 3. Express sympathy
- 4. Keep clam
- 5. Refer if he/she is abusive
- 6. Tel them you will deal with it promptly
- 7. Be professional
- distance yourself (do not take it personal)
- say nothing until the anger has died down
- use a low pitch voice and speak clearly
- respect yourself and the other party: you too have rights

If abusive, say twice: "I will have to terminate the call if you continue to use that language"

Find a way forward

#### CODE BREAKERS

## Example: 24 H in a D = 24 Hours in a Day

- 1. 13 S on the A F
- 2. The 7 D S
- 3. 12 M in a Y
- 4. 7 C of the R
- 5. S W and the 7 D
- 6. 4 P of the C
- 7. 64 S on a C B
- 8. 18 H on a G C
- 9. 8 L on a S
- 10. The 12 D of C
- 11. 28 D in F
- 12. 14 P in a S
- 13. 5 F on E H
- 14. 121 H on a C B
- 15. 11 P in a F T
- 16. 9 P in a S G
- 17. The 7 W of the W
- 18. The 10 C
- 19. 366 D in a L Y
- 20. 22 B on a S T
- 21. 52 S of A
- 22. 10 Y in a D
- 23. 4 W on a C
- 24. 16 O in a P
- 25. 7 P in a N T

KEY → http://www.rafamoreno.com/Rafa/Key5.htm

## BRAIN-TEASERS

With your partners or team members your task is to guess correctly the words or phrases represented by these pictures within 15 minutes

BLOOD H <sub>2</sub> O	R TIK O	D DUMP D U GOOSE U M FEATHERS M P DUMP P	COLLAR 102º
INJURY + INSULT	ALL GRATIS ALL ALL ALL	PERSON PERSONS PERSONS PERSONS	10001
JanOB	FGH <sup>I</sup> JKLMNOP <sup>Q</sup> RST	LESODUB (TENNIS)	T T T <u>+T</u> 4T
HEAD SHOULDERS ARMS BODY LEGS ANKLES FEET TOES	O PhD MA BSc	J U YOU S ME T	KNEE LIGHT
B L O U S SEA	LE VEL	W O R H T	T O W N
T A E B	HE'S HIMSELF	CRAZY ——— YOU	OATH ——— UR

 $KEY \rightarrow http://www.rafamoreno.com/Rafa/Key6.htm$