

Telephone Skills

Manager Support

Telephone Skills – Manager Support

Telephone contact is one of the ways in which we can support our customers and generate business.

This guide is designed to help you to support your colleagues, who primarily work in a face-to-face environment in completing telephone business with customers.

Colleagues who work in a face to face environment are very used to seeing customers on a day to day basis and dealing with their queries in the branch or agency. Colleagues may be less familiar with how this service transposes to the telephone.

This is where you step in.

What support can you provide?

Throughout this guide, you will find lots of hints and tips that you can use in training sessions with your colleagues.

You won't need to use them all with every colleague. Some colleagues may be more familiar with how to adapt a face to face conversation to be on the telephone.

One of your main roles as a manager is to develop, support and challenge

Objectives of this support guide

- Provide you with some additional support when on-boarding new colleagues.
- Provide you with some exercises for use during Closed for Training sessions.
- To help you provide some tactical support to those colleagues who find telephone business particularly challenging.

You may choose to use the activities to address a particular development area with an individual – that's great. The activities can be adapted to suit the needs of any individual no matter what level of experience they have. Don't forget to update any Personal Development Plans where relevant.

Areas of focus

Support has been provided for four key development areas.

- Building Confidence
- Active Listening
- Keeping focused throughout the day
- Overcoming Barriers

Building Confidence

Developing really effective colleagues is one of the key responsibilities of the manager and it is achieved by helping colleagues to reflect on their strengths and areas for improvement.

Remember, colleagues need to be involved in the process of formulating their development areas. This is the only way to be sure that they understand why change is needed.

If a colleague thinks they are going to fail, then the likelihood is that they are going to work towards that theory, and unlikely to build on successful calls.

Reinforcement that they have the knowledge and skills to conduct the calls starts with you as a manager.

When considering what kind of training you are doing with your colleagues, particular focus should be given to the balance between product knowledge and the core skill of completing business over the telephone. Try to avoid putting too much emphasis on one or the other area.

Training and encouragement will increase confidence in their role.

What techniques can you use to increase your colleagues confidence?

Confidence is contagious

Aim: Here are some questions that you could consider when holding a development session with your colleague about Telephone Business.

One of the most effective self-confidence building techniques that will immediately improve your colleague's confidence is when they stop comparing themselves to others.

Everyone thinks, feels, learns and sees things differently and you should encourage your colleague to build on their own strengths rather than those of other colleagues.

Activity: Pose the following questions to yourself as a Manager of colleagues completing Telephone Business.

- When was the last time you complemented your colleague on the way they handled a particular call?
- Did you provide constructive feedback on key parts of the call?
- How did your colleague feel when you gave them a boost?
- What development can you do where colleagues say they are not confident?

Outcome: This is your opportunity to reflect on the questions above, and establish if you could approach a development session in a different way.

Angry Customers Passage (Passage is within Appendix)

Aim: Colleagues needs to be aware of how fast they are talking when presenting information on a call.

Activity: Ask the delegates to stand around the room slightly away from each other

- Instruct the delegates that when you say 'Go' they all need to read the passage out loud (not shouting) at their normal talking pace until you say 'Stop'
- When they hear the word 'Stop' they should make a note of where they have got to in the passage
- If they get to the end before being told to 'Stop' – they should start reading from the beginning again. If this is the case they will need to make a note of not only where they get to in the passage but how many times they have read it in full.
- Allow one minute for the exercise
- Ask delegates to count the number of words they spoke during the minute and share with the group
- Inform delegates that the passage contains 189 words

Debrief:

When someone is talking at optimum speed their audience can absorb the information. Any faster and their ability to absorb information reduces and much of what is being said is lost.

The research concluded that optimum speed/pace is 140 words per minute.

Presenting the information contained in this passage to the customer at optimum speed would have taken you to 'Be positive and assure the customer that'

Group to calculate how many words would have been lost in a minute

E.g. if a delegate spoke at 227 words per minute then 87 words would have been lost on the customer as the "Dumping Out Factor" kicks in due to information overload

Ask: What does this mean for the customer?

- Not hearing all the information given
- Misunderstanding all the information given

Ask: What could you ask to ensure your customer has understood?

Look for:

- "Is that ok for you (use customer's name)?"
- "Are you ok with that (use customer's name)?"
- "I've given you a lot of information (use customer's name), is there anything you would like me to repeat?"

Outcome: It is always important that colleagues remain aware of their pace to ensure the customer does not misunderstand the information given and to ensure the customer does not feel overloaded.

Active Listening

Active listening is the skill of listening beyond what the customer is saying, as we also listen to the tone of voice the customer is using.

It can also be described as 'listening to what is not being said'. If we are actively listening then we are letting the customer know that we are listening. This can be achieved with verbal nods such as "uh-huh" and "yes".

Active listening also helps us to ask better, more relevant questions, while it can also build the customer's trust in us.

Empathy relies on active listening. Listening helps us to unlock the understanding of the person we are talking to. We want to avoid falling into the trap of assuming we know what the customer wants, without having a full understanding of what they are looking to achieve.

You could set aside some time for a colleague to research Active Listening. Don't forget to update any relevant information on PDP's.

Here are some activities you can do to help train the skill of Active Listening.

Don't get Angry!

Aim: This is a training exercise to evidence the importance of listening.

Activity: Divide the group into pairs. Separate out the pair to explain the next steps.

- Explain to one person in the pair that they just need to have a conversation with the other one about what they did at the weekend or a recent experience.
- Explain to the other person in the pair to stop listening after 30 seconds.

The speaker usually gets frustrated and annoyed, even though it's a training exercise.

Then switch roles, so that those who weren't listening have a go at speaking and experience what it's like to not be listened to.

Look For: Finally, both people should end up really listening and acknowledging each other.

Outcome: Everyone usually says they can feel the difference.

Grapevine (Chinese Whispers)

Aim: This is a fun exercise to develop listening skills.

Activity: Ask one volunteer to go outside of the room and instruct them that you will give them directions to arrive at a destination. Have these prepared beforehand.

The volunteer then needs to come back into the room. The other participants then line up and the volunteer whispers the directions to the first person.

They then whisper the directions to the next and so forth, carrying the message down the line.

When all have heard the directions, ask the last person in the line to say out loud the directions they have.

Look For: How well colleagues listen to the directions.

Outcome: The directions are likely to be very different to how they started out!

Series of Numbers

Aim: Put your colleagues listening skills to the test.

Activity: You are going to read out a series of numbers.

Explain to the group that they are going to hear a series of numbers.

Their task is to listen to the numbers and add them up in their head.

After the last number is read, ask the group to record the figure they have arrived at on a piece of paper.

Here is the series of numbers:

Start with 1,000, add 10, add 1,000, add 30, add 1,000, add 50, add 1,000, add 10.

Ask the group to hold up their answers on the count of 3.

Look For: The answer should be 4,100. Don't be surprised when people may score 5,000.

Explain: One of the reasons that people get an incorrect is because people can see a pattern emerging so they stop listening fully and start making assumptions and/or second guessing what the next numbers may be.

Another reason for many people arriving at 5000 as the answer is that when the human brain starts to see a pattern forming, which in this case was numbers of 1000 the subconscious brain can sometimes override our normal thoughts and make us follow its direction. When the last figure of 10 was read out, many people will inadvertently add up in 1000s instead of 10s

Ask: What would have made the activity easier?

Look for: You should expect colleagues to confirm that 'making notes' would have made the activity easier.

Explain: When you are listening to your customer, it is important to make notes.

Questions & Answers

Aim: An exercise to help develop listening skills.

Activity: The exercise involves your team to simply write down the answers to two questions.

It is important that the team don't know that this is an exercise specifically designed to improve listening skills.

The two questions are:

- How many of each species did Moses take onto the ark?
- You are driving a bus, which leaves Stoke at 8.30am with 23 people on board. It stops in Leicester, dropping off ten and picking up a further four passengers. It travels further south to Milton Keynes, dropping off another five passengers and picking up a further six. It arrives in London two hours later. What was the driver's name?

Answers:

- None, It was Noah.
- You

Once the team have given their answers, review how many got both questions right – it's unlikely to be the full team.

Ask: What made them get the questions wrong?

Explain: We hear what we expect to hear so we assumed it was Moses, when in fact it was Noah.

We don't always catch the most important part of the question (the first word in the bus example) and get side-tracked by irrelevant information.

When communicating with customers we need to listen carefully and check our understanding.

Keeping focused throughout the day

Keeping 100% concentration throughout the day, to use active listening and show genuine empathy is a very tricky task – especially when consultants are making lots of calls.

With this in mind, the ability to re-focus after each call made, becomes a key skill in itself.

Here are some things you could encourage your team members to bear in mind, when they are making lots of calls back to back:

- Taking a break – If your colleague is overloaded with calls, they will not have the energy to put themselves in the customer's shoes. Consider splitting the calls into small chunks, and only completing calls for a maximum of 20 mins at a time before taking a short comfort break.
- Interact with your colleagues – Research has consistently shown how important the relationship is between the colleague and the manager. If the colleague feels they are valued and listened to, they are more likely to interact with their customers in that way. Lead by example.
- Make it a fun environment – Who says work has to be boring? Talk to your colleagues about what drives and motivates them.

Here are some activities you can do to help develop and strengthen the skill of concentration.

Here are some exercises to help develop and strengthen concentration. For the full benefit, it is advisable that colleagues practise each exercise each week until they are comfortable they can do it with full attention.

Counting Words

Take a book, any book, and count the words in any one paragraph. Then, count them again, to be sure that you have counted them correctly.

After a few times, do so with two paragraphs.

When this becomes easy, count the words of a whole page. Do the counting mentally and only with your eyes, without pointing your finger at each word.

Counting Numbers

- Count backwards in your mind, from one hundred to one, or count in your mind from one hundred to one, skipping each three numbers, that is 100, 97, 94, etc.

Drawing shapes

Draw on a piece of paper a small triangle, square or a circle, about three inches in size, and colour it in with any colour you wish.

Put the paper with the drawing in front of you, and concentrate your whole attention on the shape you have drawn. For now, only the drawing exists for you, with no unrelated thoughts or distractions.

Keep your attention on the drawing and avoid thinking about anything else. Be careful not to strain your eyes.

You can also try to visualise the drawing with your eyes closed. If you forget how the drawing looks. Open your eyes for a few seconds, look at it, and then close your eyes and continue with the exercise.

Practise is the Secret of Success

The more time you devote to the exercises the faster you progress, but you should do it gradually.

Start with two minutes, and as it becomes easier, and your ability to concentrate improves, increase the time.

You should start to be able to concentrate your attention easily and effortlessly, upon anything you want to concentrate on.

Questions to pose to the team

- How difficult was that on your first attempt?
- How many times did you want to quit the exercise?
- Did you manage to concentrate solely on the exercise?
- Did anyone let their mind wander?
- What type of things were people distracted by?

These exercises are not for everyone, but if you have a colleague who struggles with concentration or keeping focused when completing telephone business, then these exercises may help.

Overcoming Barriers

There are many reasons that colleagues may find doing telephone business challenging compared to seeing customers in a face to face environment.

The first step in overcoming these barriers is to get to the root cause of why the colleague either feels or acts the way that they do.

Using your skills as a Supervisor, you should encourage a two-way conversation offering help and support and offer development to those colleagues who need it.

Knowing how to talk on the telephone is critical these days as a lot of communication takes place on the phone. Many times, colleagues may need to respond to unusual request or remarks and think on the spot, so the correct answer can be provided.

One of the ways in which barriers can be worked through is by simulating the situation and discussing what actions or behaviours are needed to address that situation. This can be achieved through role play.

Another barrier that colleagues may have is the negative perception, or negative experiences they have of telephone business or outbound calls. This can also be clouded by their own preferences as a customer.

It's important not to dismiss those thoughts and feelings as you strive to establish engagement and buy-in from the colleague, and instead you need to ensure that you address the 'elephant in the room'.

Unconscious Bias

As we know, unconscious biases can cause us to present or hold a partial perspective that we are often unaware of – but that can impact the way that we interact with others.

These activities are intended to support you in reducing or eliminating any bias in your team that may be leading to colleague objections around telephone business. Here are some questions for your team to consider:

- Do we know how many of our customers would welcome a call from their local branch?
- Is there a way to know how an individual customer feels before we speak to them?
- Are we justified in assuming that they feel the same way as you might feel?

The answer to these questions is, objectively, **no**.

Here are some activities you can do to help overcome barriers with your colleagues.

Unconscious Bias

Aim: To help the team understand the biases that they may currently hold.

Activity: Divide the group in pairs.

Ask each pair to:

- Consider the most recent positive and negative experience that they had while making a telephone call. This might be a marketing call or a telephone business call.
- List 3-5 factors that made each call positive or negative.

Review: As a group, discuss whether each factor is:

- **Predictable.** This discussion will likely support the following:
 - If it is – that the issue can be avoided with the right preparation
 - If it isn't – that this will likely form an unconscious bias if we allow it to
- **Controllable.** This discussion will likely support the following:
 - If it is – proactive solutions
 - If it isn't – discussion of coping strategies

Ask each team member to consider one thing that they will do differently on their next call and make sure you follow this up in a team huddle or during one on one development time. .

Consider finishing (or beginning) with the following quote:

'We don't see things as they are... we see them as we are.' – Anais Nin

Look For: Opportunities to utilise Mind-set, Language and Actions material e.g. strategies for getting back into black, understanding what may put colleagues or customers into the red.

Outcome: You are looking for an acknowledgement of the assumptions we make, strategies to improve our mind-set, and simple actions to change our behaviours.

Role Plays

You can role play which ever call, or scenario or stage of meeting that is going to support with development.

To conduct effective role plays where you are simulating a telephone call, you should place two colleagues on chairs that are back to back. Others can see them as they go through the role play.

One should be the caller and the other the customer.

Issue your colleague with a scenario, and hold a discussion following the role play.

Discussion Questions

- What was the most important technique that you learned in this exercise?
- What was the most challenging scenario and why?
- What did you find easy about this simulation?
- Do you think you could replay this with a customer?

What Would You Say?

Aim: To help colleagues understand the scale of opportunity specifically for Outbound Calls, and to set aside preconceived ideas of what outbound calling can be.

Activity: The average number of non-transacting customers across the branch network is 59%. Encourage guesses from colleagues as to what this number is. This should encourage a discussion around the number of customers that we **don't** get to interact with.

Split the team into groups of 2 or 3. Ask:

- What would you say to these customers about your branch and team if you had the chance?
- What would you say to them about the Real Help for Real Life we offer?

Allow 5-10 mins for this activity. Regroup and discuss.

Discussion Questions:

- How does what you'd say change if they came up on your outbound calling list?
- What barriers are there to approaching outbound calls in this way?

Look for: You should be looking for a conversation to formulate around the fundamental conversation doesn't change. The purpose of the conversation may take a different direction.

You also may want to like back to the Unconscious Bias Exercise and consider what is predictable or controllable about that approaching Outbound calls in a different way.

Ask each team member to describe their new approach to their next outbound call, and where possible, you should observe this call to aid development.

Outcome: You should be have facilitated a constructive conversation around the opportunities that Outbound Calls can offer, and disassociate any negative preconceptions about making these calls.

Appendix

Angry Customers Passage (For use with the Building Confidence exercise)

Angry customers do not stay angry if there is no one to fight. Encourage them to let off steam before you talk and get it out of their system. Do not interrupt them. You will learn how to listen effectively so that you can use these skills and use appropriate questions to get them talking.

We can all relate to being an angry customer and not receiving understanding from a company, so be helpful and ready to co-operate.

Remember to show your customer that you really do care. After you have shown your customer that you are ready to help and sort out their problem, let them know that you are in control of the situation, saying 'I will look into this straight away'. This shows the customer that you are caring and willing to solve their problem.

Be positive, and assure the customer that you will personally take action to help.

Never raise your voice at the customer. If you sound sharp, your customer will get angry all over again.

Go over the main facts with them before you finish the conversation. This will help you check all the information you have is correct.