

Make It Stick

*Activity Pack*

Professional Telephone Skills

**Helping lessons learned through training become part of *how we work*.**

**To the Learner Leader…**

This suite of activities has been designed to reinforce the key learning from the **Professional Telephone Skills** course. They have been designed to be led by team leaders or designated trainers and do not require training experience, though for best results we recommend that whoever is leading the activities understands the principles of adult learning and has some experience in leading learning activities.

The suite of activities will provide you with up to six months of learning reinforcement. We recommend that an activity is run each month following the Professional Telephone Skills course.

When running each activity:

* Ask the group to reflect back on the original course they attended:
  + What takeaways did they have?
  + What have they tried to implement?
  + When revisiting some of these activities for a second time, ask them what additional ideas or thoughts they have in applying the concepts and tools in the activities to their job.

Each activity will take 10-15 minutes to run depending on the size of the group.

There is one activity to a page. Each activity has a brief introduction followed by instructions for the trainer.

We suggest the following to optimise your learning experience:

* Have the group meet away from their normal workspace
* Make sure mobile devices are switched off so that everyone fully engages
* Make the environment ‘safe’ and encourage everyone to contribute
* Run these activities with everyone standing – try running these outdoors in the fresh air
* Have other team members take the lead and run an activity – this will build confidence and leadership skills
* Don’t be afraid to improvise – the learning needs to be about you and your group so make it meaningful
* When debriefing an activity get the group to reflect on what the activity means for them and what they will do differently or continue to do that underscores the learning points from the activity

**Activities in this pack**

1. The 6 P’s of paraverbal communication
2. Using positive language
3. Handling barriers over the phone
4. Controlling the call
5. Using HEAT to defuse anger
6. Ending a call

**Activity 1: The 6 P’s of paraverbal communication**

**Introduction**

Practising voice modulation will help you to get the right speed, tone and clarity in your speech. We vary our voice depending on whom we are talking to, and where we are, but we do it subconsciously. You can, as a Client Communicator, train yourself to speak professionally with a perfect pitch, speed and pronunciation. The qualities to look for are:

Pace

Projection

Pitch

Pause

Pronunciation

Positivity

**Instructions (with due reference to Dr Seuss)**

Split participants into pairs sitting back to back. Have the script below printed out to give to each pair.

Your company specialises in the sale of Tweetle Beetles. You receive a phone call from Mr Knox who wants to know more about them. Read out the following information to Mr Knox using the 6 P’s. Your partner is to evaluate you.

“Very well, then, Mr. Knox, sir. Let’s have a little talk about tweetle beetles. . . .

Well . . . When tweetle beetles fight, it’s called a tweetle beetle battle.

And when they battle in a puddle, it’s a tweetle beetle puddle battle. AND when tweetle beetles battle with paddles in a puddle, they call it a tweetle beetle puddle paddle battle. AND . . .

When beetles battle beetles in a puddle paddle battle and the beetle battle puddle is a puddle in a bottle . . .

. . . they call this a tweetle beetle bottle puddle paddle battle muddle. AND . . .

When beetles fight these battles in a bottle with their paddles and the bottle’s on a poodle and the poodle’s eating noodles . . .

. . . they call this a muddle puddle tweetle poodle beetle noodle bottle paddle battle.

Would you like to place an order My Knox?

Questions to reflect on at the end of the activity:

* Why does practicing recitals such as the one above help you linguistically and boost your confidence?

**Activity 2: Using positive language**

**Introduction**

There are ways to put a client at ease. Your opening lines should leave a positive impression.

With an opening, you must show that you are happy to receive the call and eager to help the clients. You may not have the answer now, however you are displaying confidence that you will act to assist.

**Instructions**

Practice the following in pairs with one person being the client/customer and the other person receiving the call. The person receiving the call is to make a positive first impression and continue to be positive during the remainder of the call.

**Scenario 1**

Mr Abrahams calls to speak to Mr Collins. Mr Collins’ phone is going to voice mail.

**Scenario 2**

Customer, Juan Carlos, bought a plasma TV from you last year and is having difficulty contacting the warranty company to get it repaired.

**Scenario 3**

You work in a call centre and an inbound caller has asked to speak to your supervisor who has gone home ill.

**Scenario 4**

A customer has called for a refund which is outside the terms of your refund policy.

**Scenario 5**

A client has called for Ms Burchell who you know is in a Board meeting. The caller is insisting that you let him know when Ms Burchell will be free.

**Scenario 6**

You work in sales. A supplier has been put through to you and wants to know when his invoice is going to be paid. He is quite angry on the phone.

**Debrief questions:**

* Discuss some of the challenges people have had with being positive on the phone.
* What can you do to end a call on a high note?

**Activity 3: Handling barriers over the phone**

**Introduction**

There are a number of barriers that exist with phone conversations. As professionals we need to know how to overcome them. Common barriers appear in the table below.

**Instructions**

Conduct with the group as a whole. Ask the group for examples of how each of these barriers can manifest during a phone conversation and how they might overcome them. Examples are given in the table below.

|  |  |
| --- | --- |
| **Physical**   * You are in a noisy environment – open office plan * Poor line connection * Their mobile line keeps dropping out of service * You are having a conversation with someone who is standing in front of you at the same time * You can tell the caller is having a conversation with someone else at the same time | Overcome  Advise them you are finding it difficult to hear them and ask if you can call them back. |
| **Cultural**   * Generational difference in communication style * Hard to understand dialect * Broken communication * Should you use formal or informal communication * Culture may be one way communication style – want to tell, not listen * Urgent in one culture may be different in another | Overcome  If it’s hard to understand, slow your pace down and speak clearly in the hope that they will match it  Ask them to spell it out a word if it is unclear  Have them define (e.g., what is your timeframe when it comes to urgent?)  Use closed question techniques so you are only looking for one word responses |
| **Language**   * Use of jargon e.g., WBS may mean Work Breakdown Structure for one person, but Wireless Broadband System for another * Swearing, belittling, superiority | Overcome  Say all words in full unless you know they are aware of the shortened format  Use their name to indicate that swearing is not acceptable. Advise you are here to help and we can achieve this if we work together |
| **Perception**   * You have a preconceived idea about the caller * Preconceived idea about the issue and stop listening * You have a perception that the caller will not listen to you and what you have to say because of your position (i.e., only wants to speak with supervisor) | Overcome  Stay focussed  Take the emotion out of it and stick to the facts  Consider this to be the first time you have ever spoken with them  Consider this to be the first time you have ever heard of this problem |
| **Interpersonal**   * The problem is with you – you don’t want to answer the call – you would rather be somewhere else doing something else * It’s clear that you and the caller don’t get along * You don’t have the confidence | Overcome  Challenge yourself to turn the situation around for the enemy to become your friend  Don’t take it personally  Keep your words simple and no pointing fingers  Own up if you don’t know the answer – be true to yourself and the caller |

**Activity 4: Controlling the call**

**Introduction**

Controlling a call means:

* using a mix of open and closed questions to gain sufficient information to understand the purpose of a call and clarify your understanding
* using summarise questions to ensure both parties on the call share the same understanding
* arranging a suitable time in which to follow up with the caller and clarifying with the caller how much time you will need to address the issue

**Instructions**

In this activity a phone call is simulated between a caller and a receiver with a third person observing and providing feedback. Caller and receiver are to sit (or stand) back to back. The receiver is to do their best to control the call.

Make scenario cards using the suggestions below or make up different scenarios more suited to your business.

|  |  |
| --- | --- |
| **Caller** | **Receiver** |
| It is Wednesday. You call ABC Marketing to check on the progress of a marketing report being prepared for you, due this Friday. This will allow you to prepare for your meeting on Monday to present it along with your department’s strategy for the next financial period to the executive. | You have not been able to prepare the marketing report for delivery to the customer which is due this Friday. You are about to call ABC Marketing to explain when the phone rings. |
| You are holding a major event in two months’ time. You have been advised that the keynote speaker had been double booked and will not be able to attend. Your ticket sales have been strong based on the draw power of this speaker. | You work for ABC Events Management. The person in charge of booking all your keynote speakers is Emily Dove, whom you report to. Emily is on leave for the next two weeks. You are reviewing forward bookings when the phone rings. |
| You are making all the arrangements for a high level industry delegation visiting from overseas. You have reserved a private room at your city’s swishest new restaurant and are calling to change the reservation from 7pm to 9pm as there has been a flight delay. | You handle all bookings for the Heights Restaurant located on the 40th floor of the Heights Towers. You have been booked out for weeks with people paying a fee upfront to secure a table (which is then deducted from their bill). You book new parties in every two hours from 6pm. It is 6pm on a very busy night when the phone rings. |

**Debrief questions:**

* What can make it difficult to control a call?
* How can you improve the quality of the questions you ask?

**Activity 5: Using HEAT to defuse anger**

**Introduction**

When dealing with an angry client, the challenge is to keep your composure and work at minimising the effect the outburst has on your emotions. Use HEAT to defuse the situation:

* Hear them out - Allow them the time. Sit back and listen to them without interrupting or judging.
* Empathise - Acknowledge your client’s feelings. Empathising with a client helps them to feel that you are on their side.
* Ask questions - Accurate questioning helps the caller to explain the situation clearly. It is also a method to regain control of a conversation and to cut short unnecessarily long discussions.
* Take responsibility and thank them - Tell them that you will make every effort to get the issue resolved as soon as possible. Always thank your client, no matter how difficult the call was.

**Instructions**

In pairs with another observing, role play the following scenarios. Caller and receiver should be sitting back to back.

**Scenario 1**

Delay in giving service. The client expected the repair-work on his car to be completed by Monday. It is now Tuesday, and the client wants the car back.

**Scenario 2**

Delay in the delivery of a product. The clients expected the parcel to reach her by Monday. She called to know the reason for the delay.

**Scenario 3**

Clients wants a refund. How would you handle a client that is dissatisfied with a purchase and wants a refund when your company does not allow it?

**Debrief**

Ask participants to share conversations with callers that did not go well. Ask them to reflect on which parts of the HEAT techniques they used or didn’t use and which parts were effective. Discuss with the group on how the call could have been handled differently.

Conversely ask participants to share details of calls with angry clients that did go well. Discuss how the HEAT technique was effectively applied.

**Activity 6: Ending a call**

**Introduction**

Ending of a call is as important as its beginning. Being polite and enthusiastic until the end helps to ensure that the client retains the favourable impression you created during the call. Remember the following:

* End the call on a high note – make the client feel you care about them and their call
* Summarise – summarise the conversation at the end of the call
* Add value - It is important to add value to your conversation till the end
* Thank the client for calling - Thanking a client for calling at the end of the call is a gesture of appreciation that says “You are important to us.”
* Close down waffle politely - After you have provided a client with important information and the client is repeating the same things again, you want to suggest at ending the call.

**Instructions**

Split the group into pairs sitting back to back. Pairs are to practice ending calls. Use the scenarios below or make up your own.

|  |  |
| --- | --- |
| **Caller** | **Receiver** |
| Mr Benson has always dealt with your personal account. He has done so for the last 10 years. There is a new person who you don’t trust with your personal information.  You insist on speaking to Mr Benson. | You work in the accounts department. You are new to the job and were handpicked for the role by the Accounts Manager, Mr Benson. You have been brought on as accounts has become very busy as the business had doubled in size over the last 5 years |
| You are calling the builder of your home. The tiles and splashback in the kitchen are not exactly what you agreed to. The tones are too orange and will not match your other décor options. You have several suggestions for replacing them. | You work on reception for ABC Homes. The design team are in a meeting for the next three hours. |
| You received a letter advising that you have an outstanding debt for unpaid tuition fees. You received a similar letter six months ago and rang and sorted out the issue which was a database error. You have no outstanding debt. The letter is stating that legal action will be taken if the debt is not paid in 30 days. You are glad to be finishing your studies as you have had endless issues with student administration. | You handle student account enquiries. You are aware that some students have received letters in error about outstanding tuition fees. |