

Service with Aloha

Telephone Courtesy Basic Training



Why does it matter?

Do people still even make calls?

The short answer is, YES!

- The campusHELP office alone gets 300-800 calls each month
- Calls come from all members of the campus community: students, parents, faculty, staff, vendors, alumni, and the community

And...

- A phone call is often an individual's first interaction with the University of Hawai'i
- People usually call for clarification or peace of mind in times of uncertainty

The goal of this presentation is to provide guidelines for phone courtesy that you can incorporate into your everyday work

What you should come away with?

Goals

- Have a set of practical tools to use in interactions with individuals over the phone
- Be better able to empathize with callers
- Be better able to decipher what a caller wants/needs
- Feel more confident in your ability to handle calls
- Contribute to the overall mission of the institution to provide a high level of service to all

Every interaction is an opportunity for you to make an impression on behalf of the University

Your tone says it all

People hear the tone of your voice before they hear your words

- Smile - Your voice is all the caller “sees”
- Try not to let your emotions show
- Put energy into your voice
- Make an effort to project a warm, crisp voice tone
- Be sincere



Having good posture or smiling when you answer the phone can help warm your voice

Timing is Everything

Time is accentuated on the phone

- A few seconds may seem like a long time for the caller, especially if this isn't the first office he/she has contacted
- Answer calls on the first two (2) rings whenever possible
- Return to callers on hold to reassure them you are still working on their request.
- Allow callers to leave a voicemail if you're not there (set up voicemail box with an appropriate greeting and don't allow it to get full)



Be responsive and communicate progress

If an issue is going to take time to resolve, let the caller know that you are working on it and inform him/her of the progress you've made

Respond to voicemail messages in a timely fashion, reference the message when you return the call

Initial Greeting

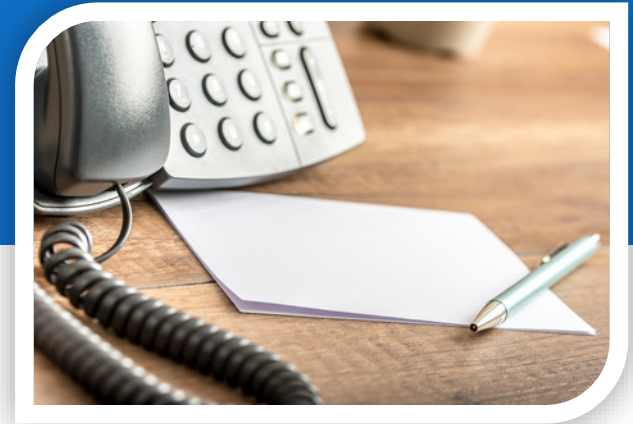
Hello. Hi. Sup.
Alright. Ayup.
Howdy. Hiya.
Greetings. Yo.

A warm initial greeting can put the caller at ease right from the start

- Speak clearly and loud enough for the caller to hear
- Provide the name of your unit
- Provide your name
- Establish an agreed upon greeting
 - “May I help you?”
 - “How may I assist you?”

Aloha! UH Mānoa campusHELP, this is Sally, how may I help you?

Conveying Absence



- Do not elaborate on absence
- Offer to take a detailed message
- Ask if you can be of assistance instead
- Overestimate the amount of time it will take for the person to return. You do not want to give the caller unrealistic expectations.

“She is out of the office at the moment. May I help you or would you like me to take a message?”

Cold Transfer

Transferring to someone the caller did not ask for specifically

- Provide caller with your reasoning for the transfer, then request permission to transfer
- Give the person receiving the call as much information as possible before connecting

Warm Transfer

Someone the caller asked for specifically

- Politely ask the caller to hold, then let the person know you are transferring the call
- Provide caller with the number for future reference

Stay on the line until the person receiving the transfer accepts

Taking a Message includes

- Caller's full name
- Caller type (student, parent, prospective student, etc.)
- Call back phone number
- Action requested (what does the caller want/need?)
- Date and time of call

Being an Active Listener

Listen attentively, look for ideas behind the words and listen for feelings

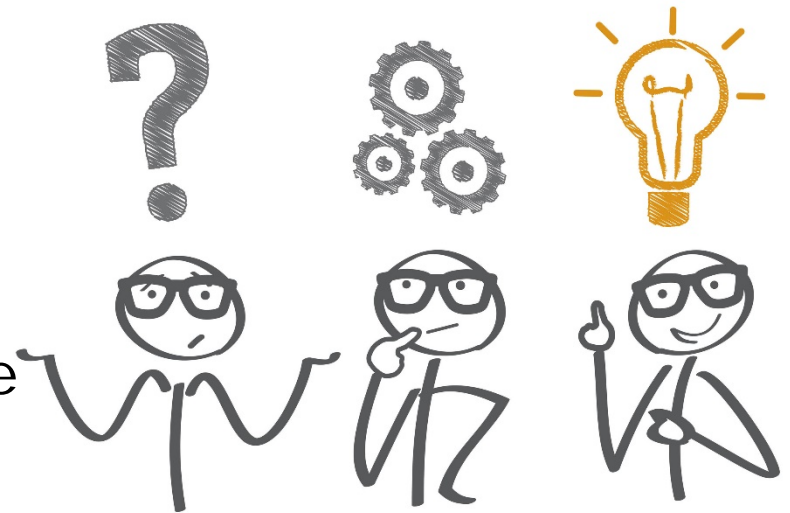
- Listen more than talk
- Listen without judgement
- Allow caller to finish before speaking
- Take notes
- Ask questions
- Paraphrase to clarify
- Occasionally acknowledge to let the caller know you are listening



Handling Irate Calls

Keep calm and remain composed

- Listen to understand
- Acknowledge the problem
- Apologize and accept responsibility
- Do your best to solve the problem by working with the appropriate people



*“I understand why you are upset. I’m so sorry.
I am going to do my best to help solve the problem.”*

Be unflusterable

1. **Patience is crucial.**
2. **Own it** (*don't look for another person or place to dump the issue—grab it and run with it*)
3. **Take your opinions and emotions out of the equation**
4. **Let your default answer be yes** (*if there isn't a good reason to say no, don't look for one*)
5. **Make it right for the customer** (*end the interaction better than when it began*)

Problem Solving



Identify the problem

- The caller may not even know/understand what the problem is
- Ask appropriate questions to find out what the caller really needs
- Clarify the issue

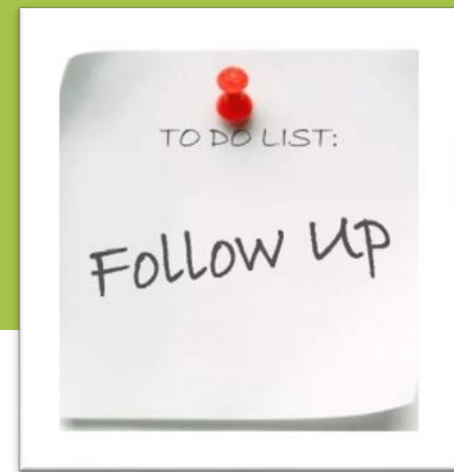
Gather Information

- Get the facts: who, what, when, where, why and how
- Check for understanding (repeat what you have heard/understood)
- Do not express opinion

Think of creative solutions to remedy the situation

- State what *you* intend to do next and ensure you do it
- Let the caller know what he/she needs to do next
- Follow up to ensure issue has been resolved

Following Up



Sometimes more work is necessary

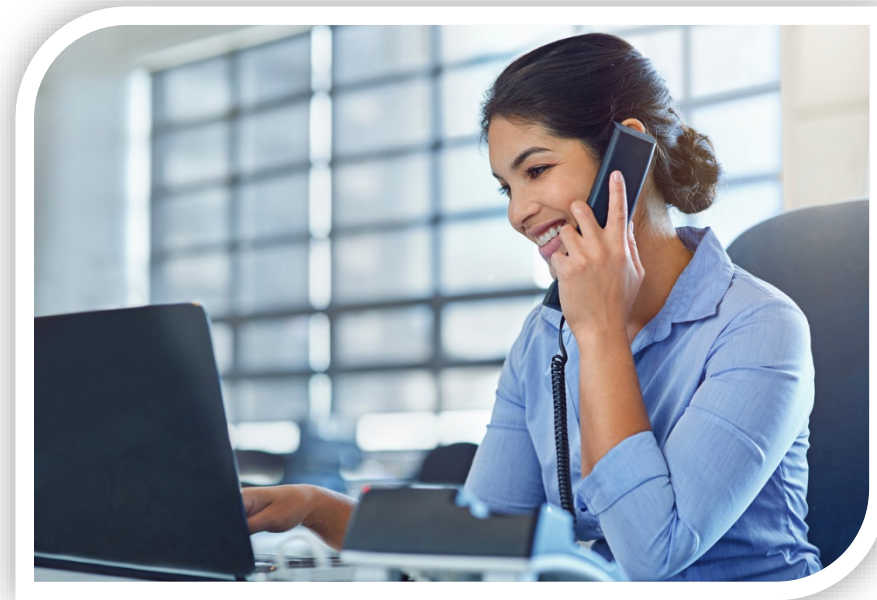
- If you need to follow up with someone within your office, make sure you put the caller on hold first
- Don't leave the caller on hold for too long – always update from time-to-time.
- Don't "guess" which department can help the caller. Confirm with the department before transferring the call.
- If the problem will take time to solve, let the caller know you will call him or her back (provide general timeline) and ensure appropriate follow-up.

"I am not sure how to answer your question. Do you mind if I confirm with another department and call you back in 20 minutes?"

Ending a Call

Provide caller with a sense of resolution and support before ending a call

- Ask if there is anything else you can help him/her with
- Provide contact information for future reference if you feel the caller may have additional questions
- End with a pleasant thank you and farewell
- Make sure the caller drops the receiver before you do
- Hang up quietly



Your Potential Impact

What you do matters

- You help to build/strengthen the callers connection with the University of Hawai'i
- You assist in the often challenging transition to college life for many students and their families
- You showcase the caring culture of our islands
- You promote transparency and inclusion
- You provide valuable assistance to someone in need

You make a difference. Thank You!