**CLOSE TO THE CUSTOMER ON THE TELEPHONE**

By

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Managers, do you know how the employees in your organization and in your department are answering the telephone? Most of them probably recognize your voice, so if you want to check out the phone courtesy in your organization, don't make the call yourself. Have a friend call and ask to speak to a higher-up – a manager, a boss or a doctor – when the mucky-muck is in the office.

If whoever answers the phone asks the caller to give a name and what company the caller is from or, worst of all “What is this in reference to?”, have the friend give a common name like Smith or Jones, a fake company if that’s asked for, and a made-up reason. Later, have your friend tell you exactly what happened and precisely what was said. You want to know the attitude and feeling that was conveyed over the telephone. Have the caller tell you the impression he or she got about your company from the experience.

Notice that I didn't recommend that you have a customer make the call for you. It's been my unfortunate experience that about eight times out of ten when customers call, they will be treated as if they were lepers who the person answering the phone doesn't want to deal with. Receptionists, assistants and others who answer telephones under the cover of anonymity all too often take the opportunity to exercise a little power, to vent some frustration, or worse, to carry out misguided screening instructions from their bosses. Having multiple bosses exacerbates the problem, because different bosses often give different answering and screening instructions, which confuses everyone.

When they are confused, employees typically select the screening method that is the rudest and most insulting. The tragedy of this situation is that too many bosses either don't know or don't care how the people who call, including customers, are being treated. Many bosses are more concerned about their own egos than about the impression that is created about their organizations. Some executives feel the need to play childish power games like insisting that the other person get on the line first, or insisting that receptionists and secretaries ask the two hateful questions: (1) "Who's calling?" (usually growled in an intimidating voice) and "may I tell him what this is in reference to" or "what's your company?" (usually said with the utmost haughtiness).

People who insist that receptionists and assistants use these screening devices deserve one of the following responses:

 "Yes, tell him the shipment arrives at midnight, and he's to come alone." "Yes, tell him the blonde that liked his poetry called to say that the test came back positive."

Or use the one suggested by Andy Rooney: "Yes, I understand he's looking to replace his rude and surly assistant," or, as is most often the case, "rejectionist" as Andy Rooney would have called them.

In my experience, the lower the self-esteem and the less secure they are in their job, the more bosses use power--augmenting telephone techniques. On the other hand, people who feel good about their organization and about themselves will go out of their way to make sure that everyone who answers telephones, including themselves, conveys a positive attitude.

It is a good idea to circulate memos on a regular basis (at least every six months) to remind people how your organization wants your telephones answered and what kind of phone courtesy is expected. Give a copy of your telephone courtesy memo to all new employees in their benefits package when they are hired and to your bosses so they know that you are on top of this situation.

Often employees come to work for you from another company where telephone manners were atrocious, so don't assume that everyone knows how to do it right, since they may have been trained improperly. One thing to insist on is that people give their first names when they answer the phone: "Hello, XYZ Corporation, this is Charlie; how can I help you?" Giving first names is very warm and friendly, and helps put callers at ease. Giving first names also assures that people in your organization will be more alert and a little sunnier when they answer phones, because they are no longer anonymous. If there is a complaint about someone being rude on the phone, everyone can deny it if the caller can't identify the person who answers.

The right attitude to have when answering the telephone is to assume that everyone who calls is eager to give your organization a huge, profitable order, even if the caller is a known bill collector (most companies seem to treat everyone calling as though they were bill collectors, regardless of the call's purpose). Give the person calling the type of pleasant, caring, helpful courtesy and service you would expect from a car dealer who is trying to sell you a Rolls Royce.

For example: "Good morning, Mr. Smith's office, this is Sandy; what can I do to help you today."

"May I speak to Mr. Smith?"

A. Response if you are not screening calls (the preferable mode): "Certainly! One moment please" (Remember the huge order you're going to get.)

B. Response if you are screening calls (the mode to use only when necessary): "I'm sorry, but he stepped away from his desk for a moment, but I could go find him if you'd like." (Said eagerly, with a clear desire to help get that huge order.) It is rare that someone will ask that Mr. Smith be sought out or paged unless it is an important matter, in which case, this question is a good way of finding out that the call is important. Of course, you will get burned once or twice a year by people you don't know who think what they want is more important than you think it is.

"No, just tell him that Bill Jones called from the Friendly Collection Agency, and ask him to call me as soon as he can. My number is 322-8027."

"Of course, Mr. Jones, I'll have him call you back as soon as he returns. I know he's anxious to talk to you."

In other words, there are a number of perfectly acceptable, nice, friendly, credible dodges that can help ferret out the name of the caller. If the caller doesn't volunteer what the call is about, then do not ask. If people who answer the phones ask about the nature of the call, then they deserve to get trashed. When you ask "who's calling?" or "will he know what this is about?" you are, by implication, indicating that if the person being called doesn't think the matter is worth his time that he will ignore the call. You'd get incensed if a Rolls Royce salesperson treated you this way, so put yourself in the caller's place and treat everyone like a customer.

Management books since Peters and Waterman's best-selling *In Search of Excellence*, have stressed the fanaticism with which great companies pursue giving excellent customer service – the unyielding commitment they have to getting "close to the customer" by practicing "nicemanship." Or, in Apple’s words “delighting customers.” Are the people who answer your telephones helping you to delight your customers? Are your employees practicing "nicemanship" every time they answer the telephone, or are they immediately and rudely putting people on hold (since when did "please hold" begin to substitute for "hello?") or screening your calls in a way that makes your customers want to call someone else who is nicer, friendlier, more courteous, and more eager to do business with them?

Instruct receptionists and others who are the first to answer incoming calls that their job is to *direct* calls, not to *screen* them, and if they don’t direct them courteously, they will be replaced by an automated “press-one-for customer-service” system which are frustratingly impersonal, but at least the automated, recorded voices are pleasant.

Remind people who answer the phones that you don’t have automated systems because you want real, nice, friendly people in control of your organization's first impression and image.