**CLOSE TO THE CUSTOMER ON THE TELEPHONE**

By

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If you’re a CEO or division general manager, do you know how people in your organization or 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 for a manager­ when he or she is in the office. If whomever answers the phone asks the caller to give his or her name, have the friend give a common name like Smith or Jones. Later, have your friend tell you exactly what happened and precisely what was said. You want to know the attitude and feeling that people conveyed over the telephone. Have the caller tell you the impres­sion he or she got about your organization 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, administrative assistants, coordinatiors 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 executives either don't know or don't care how the people who call, including customers, are being treated. Many managers 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 assistants ask the two hateful questions: (1) "Who's calling?" (usually growled in an intimidating voice) and (2)"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."

"Yes, I understand he's looking to replace his rude and surly assistant" (or, as is most often the case, recep­tionist, or "rejec­tionist").

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 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. Often em­ployees come to work for you from another organization 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 or donation (non-profit), even if the caller is a known bill collector. Most organizations 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 customer of donor who is eager to invest or give $10 million. For example:

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

"May I speak to Mr. Smith?"

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

**Response B**: If you are screening calls (the mode to use only when necessary): "I'm sorry, he’s in an important meeting, but I could interrupt him if it’s important." (Said eagerly, with a clear desire to help get that huge order.)

It is rare that someone will ask that Mr. Smith be interrupted 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*. You can, however, say something like “maybe I can find someone else who could help you?” This type of question should get a response. If people who answer the phones ask directly 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 regarding?" you are, by implica­tion, indicating that if the people being called don't think the matter is worth their time that they 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.

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 help?

Instruct receptionists and others who are the first to answer incoming calls that their job is to *direct* calls and *not to screen* them and to delight customers who will want to come back again and again because they’ve been treated so nicely.