

TELEPHONE ETIQUETTE AND Customer Service

Training Materials for VRC Employees

Valley Radiology Consultants

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7 ESSENTIAL GUIDELINES FOR TELEPHONE USE AT VRC Employees

1. Every primary office line should be answered by a “live” person; not by voice mail.

Problem: Employees, Referring Doctors, patients and vendors often have a difficult time finding a “live” person to assist them via the phone.

Solution: Do not use phone mail on primary office lines. Where phone mail is deemed appropriate, as determined by line management, it should be used efficiently and effectively to meet the needs of the caller (i.e. short, effective messages with the option to speak to a “live” person).



2. When the telephone rings, answer it promptly.

Problem: At times, when employees leave their office, no one answers their phone.

Solution 1: Ask a co-worker to answer your phone when you are away from your desk.

Solution 2: If you are out of the office for an extended period of time, make arrangements with fellow co-workers to cover telephone duties.

Problem: Oftentimes calls are not answered until the third, fourth, or fifth ring.

Solution: Briefly excuse yourself from any face-to-face conversation and answer each call before the third ring (once you have answered the telephone, you have the option of placing the caller on hold).

3. Take responsibility for the calls that you answer. Don't forward a problem to someone, that you can resolve yourself.

Problem: Frequently callers are transferred (often multiple times) to others before getting the assistance they need.

Solution: Help each caller to find resolution to his/her problem in an effective and efficient manner. Where necessary ask the caller if you can place him/her on "hold" while you find the answer to their question or ask them for a number where you can call them back.

4. Inform others when you are transferring a call to them.

Problem: Callers who get transferred (especially multiple times) tend to get irritated and frustrated.

Solution 1: Inform others that the call you are forwarding is a transfer call and what it is in regards to. This gives the recipient the "heads-up" so they may be especially understanding and helpful to the individual who is calling.

Solution 2: Place the caller on "hold" while you place calls to get necessary information to assist the caller.

5. Return phone messages within one hour with time sensitive information.

Problem: Oftentimes messages do not get returned in a timely manner or do not get returned at all.

Solution: Return all calls within an hour regarding orders or questions that are time sensitive.

6. Answer and place calls in a kind and professional manner.

Problem: Many people who initiate calls to others do not tell the recipients who they are.

Solution: Let people know who you are immediately – at the beginning of the conversation.

Problem: Some employees answer the phone improperly and are curt, cold, rude, or argumentative with the caller.

Solution: Learn good telephone etiquette and remember to be kind and helpful to the caller. Remember that callers can detect your disposition very quickly. Use your smile and it will come through the phone as friendly and helpful.

7. Go the extra-mile to serve customers, whether by phone or in person.

Problem: Mediocre or poor customer service, or doing "just enough to get by."

Solution: Commit yourself to going the extra-mile in service to others. Prepare yourself physically

(rest, nutrition, exercise) and mentally to give good customer service. Focus on “people” versus “tasks.” Exceed the expectations of those you assist.

Please Note

Due to privacy issues, personal phone numbers should not be given out by VRC employees. If necessary, a VRC employee may act as a go-between for a caller and the person he/she wishes to contact. It is recommended that VRC employees adhere to the following steps:

- a. Find out what the issue is.
- b. Place the call to the personal number to see if the employee wants to talk with the individual placing the call.



THE BASICS: TELEPHONE ETIQUETTE SKILLS FOR VRC EMPLOYEES

Whenever an employee answers a telephone, he or she represents the employer. To the person on the other end of the line, each of us represents VRC. We may be the initial contact or only contact a person has with the practice.

1. Suggestions for Answering the Telephone at Valley Radiology Consultants

- Answer the phone promptly.
- Use VRC greeting and identify yourself; e.g. "Valley Radiology this is ____, How may I help you?"
- Speak with a smile in your voice. If you smile when speaking on the phone, your tone of voice is more welcoming and friendly.
- Show interest in the caller and their problems.
- Be of service and offer assistance.
- Be informed about VRC, its services, and personnel. Have basic materials and information readily available for reference. Become an informed person so that you may be of help to others.
- Make referrals to other people properly. Offer to transfer the call, making sure to always give the number you are referring them to in case you get disconnected.
- If you must put a person on hold, ask permission first and only keep them on hold for about 45 seconds before checking back with them.

- If the person that was being called is not available, say, "I'm sorry; Beth is not available right now. May I help you with something or I can take a message for Beth?"
- Take messages clearly and correctly. Telephone messages must be taken carefully and delivered promptly. Taking a message requires: (1) being polite and professional on the telephone and (2) recording all the facts correctly. Double check spelling and numbers with the caller.

2. Suggestions for Making Telephone Calls from VRC

- Make sure you know where and whom you are calling. Have the correct number.
- Identify yourself; e.g. "Hello, my name is Liz Smith. I am calling from Valley Radiology"
- Be prepared. If you have several items to discuss, make a list beforehand so you will not forget anything important. Have any necessary information nearby, and get to the point of your call.
- If the person you are calling sounds busy, ask if you may call back at a more convenient time.
- Make use of available technology such as answering machines and voice mail if no one is available to speak with. Make sure to leave a detailed message and leave a call back number they can return the message if needed.

3. Suggestions for Dealing with Angry Callers

- Demonstrate sincere sympathy and understanding. Say something like, "I'm sorry about that; tell me what happened."
- Express a willingness to help.
- Listen. Take notes to help you remember important details.
- Make a commitment to help, and then keep your promise.
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TELEPHONE COURTESIES

1. Identify yourself by announcing your name or the name of your company, instead of just "hello".
2. Speak directly into the mouthpiece—one inch from your mouth—so that your voice will be clear and you can be understood. Speak clearly and enunciate your words.
3. Use your hold button. Unless you cover both ends of the handset, your voice is still transmitted and you will be heard.
4. Before you put a caller on hold, ask for permission to do so. Do not leave the phone for more than 1 minute.
5. Speak with enthusiasm – smile into the receiver, because your voice will reflect your attitude.

6. 55% of communication is non-verbal. For this reason, it is important to develop good listening and verbal skills to compensate for the lack of eye contact, facial expressions, and gestures.
7. Use the other person's name often. People like to hear their name.
8. Use good grammar and diction; avoid slang. Gum chewing destroys good diction.
9. Speak slowly enough to be easily understood. Link words together, connecting the end of the last word and the beginning of the next one.
10. Be informed about your business, its services and personnel, and have basic materials and information readily available for reference. Make referrals to other people and departments properly.
11. End the conversation with a definite "goodbye" or any other expression which leaves no doubt that the conversation is ended.
12. Who should hang up first? Let the person calling hang up first.
13. Hang up the receiver gently.

VOICE MAIL GUIDELINES

- If at all possible, do not use voice mail on business phones.
- If you feel that you need to use voice mail, learn how to properly use it.
- Avoid using the "system greeting"; record a personal message and keep your message up-to-date.
- When recording a greeting, use appropriate message, tone, etc.
- Avoid "dead end" messages (messages where callers have no option to speak to a "live" person).
 - Keep your voice mail box empty (many people have mail boxes that are full).

CALL PROCESSING SYSTEMS (I.E. "DECISION TREES")

1. Definition of Call Processing

- A method in which an automated "decision tree" is created on a phone line that forwards callers (depending on the numbers they push on the key pad) to various numbers or "listen only" boxes.

2. Pros of Call Processing

- Processing is consistent from one call to another and allows people to access information 24/7.

- Automated systems can answer redundant questions, freeing up time for those creating the system to work on other issues.

3. Cons of Call Processing

- Removes the "personal touch" from the transaction.
- Is frustrating to callers who know who they want to talk to, but may have to go through an elaborate processing system first.
- Makes it difficult for fellow co-workers to do regular business with one another.

4. Tips for the Appropriate Use of Call Processing

- Don't use call processing as a maneuver to discourage people from calling your office.
- Consider what customers want and need (i.e. determine what good customer service is).
- Make menu options as brief as possible. Long messages are frustrating to customers.
- Keep the number of options that you create on your system to a minimum.
- Never end a greeting without giving the caller an option to speak with a "live" person.

5. Call Processing at VRC

□ Call processing at VRC must be approved by line management.

TELEPHONE ETIQUETTE SURVEY *(Conducted in 2011 within 3 healthcare systems in the US)*

- Identify who you are at the beginning of the conversation.
- Use good telephone etiquette with people *in house* as well as outside callers.
- Don't interrupt people when they are speaking. Let them finish their sentence or idea.
- If you are not able to speak with the person you called, don't pry. For example, it would be inappropriate to say "Oh, is John off today?"
- Always identify yourself when you answer the phone and when you call someone—by company and by your name. (Remember that not everyone has caller ID, and those who do sometimes still don't know who you are.)
- Pick up the phone with a smile. Be happy!
- Put some personality into answering the phone; please, no monotone or acting as though you are bored.
- If you don't know the answer to the caller's question, acknowledge it. Don't make up something or try to sound like you do know the answer.
- Try to help the person calling by looking up a phone number, transferring the call to the *right* person, or find out the correct information, versus telling them they have the wrong number or transferring them to anyone just to get rid of them.
- Please treat the caller with respect and courtesy.
- Please treat the person *you call* with respect and courtesy.
- Never hang up on someone just because you are finished with the conversation.
- Apologize if you dialed a wrong number and be understanding if they dialed you incorrectly.

- Don't convey an "I'm an important person" attitude. We are all important people.
- Use respectful and considerate words and phrases, such as:
 - "I'm sorry."
 - "Thank you."
 - "Please."
 - "May I take a message?"
 - "Would you like to leave your number?"
 - "May I put you on hold?"
 - "I'm sorry to keep you waiting."
 - "He's away from his desk. May I have him return your call?"

- Don't use words and phrases such as:
 - "Huh?"
 - "Yeah."
 - "I don't know where he is."
 - "She's at lunch. Call back later."
 - "He's not here."
 - "I don't know where he is or when he'll be back."

- When you receive a transfer call say: "This is (your name). May I help you?" (No need to reintroduce the company again.)
- After asking a caller to hold for the person they are calling for, be sure to say "You're welcome" after their customary "Thank you." It shows that you are truly listening to them and not in "Receptionist mode."
- is really important to be sure and tell the person on the other end what you are going to do, such as: "If you'll hang on just a minute, I'll see if I can find an answer," or "I'm going to transfer you to another area" (then give them the number where you are transferring them in case the call is disconnected in the transfer.)
- Always remember that what the person is asking is extremely important to *them* (although it may not seem important to *you*), so treat them as if they are the only person you have to deal with.
- Remember that the phone is not more important than the person standing in front of you; be sure to acknowledge the person standing in front of you and let them know that you will be with them as soon as possible.
- Ask people if it is okay to put them on hold. Their time is valuable too and maybe they would rather leave a message.
- Ask for permission to transfer a person to a voice messaging system. Some people don't like to talk to machines. They would rather leave a message or call back.
- Repeat telephone numbers to make sure you have copied them correctly.
- Take the person's name and number and call them back if you think it could take longer than a minute or two to research the answer or find the right person to handle the call.
- As a general rule, you should not transfer a call and hang up before making sure someone is on the other end to handle the call.

- Always be aware of your tone of voice at all times. Be cheerful without being fake, gushy, or silly. Speak clearly, and if you are wearing a headset, make sure the microphone is directly in front of your mouth.
- Do not be speaking to someone else when you pick up the phone.
- If you need to find some information or ask a question to someone in your office, put the person on the phone on hold instead of just setting the phone down.
- If you put someone on hold, do not leave them there for longer than 60 seconds without giving them more information or asking if they are willing to continue holding.
- Don't sound impatient or put-out.
- Try to be as helpful as you possibly can. Put yourself in the caller's position.
- Don't interrupt others who are talking on the phone. If it becomes necessary to interrupt a call, simply hand the person who is speaking on the phone a handwritten note.
- Always end your conversation by saying "good-bye." Not "bye, bye" or "see ya." Good-bye is a formal ending and very professional.
- Always repeat a person's name and phone number before hanging up. Then the person has a chance to correct any mistakes. Remember too that it is important to obtain needed information by asking polite questions, such as: "Could you spell that for me?" or "Would you mind repeating that for me?" When you use words or commands such as "spell that for me," or "say it again," it puts the other person in a defensive mood.
- No matter how rude the person is on the other end of the line, we need to remember that we are representing VRC and have to do our best to be "polite" and "helpful."
- Whenever I answer the phone I try to put myself in the other person's shoes. How would I like to be treated?
- If a person is getting upset, I always try to remember that it's probably not me that they are mad at.

CUSTOMER SERVICE: POINTS TO REMEMBER

(Reference: Adapted from John Tschohl, Connections, Copyright 1989, Published by Better than Money Corporation, Bloomington, MN, emphasis added)

- Commitment is vital to producing quality work and good service to patients.
- Each of us need the help and support of others.
- **Each job in VRC** contributes in an important way to the well-being and quality care of patients.
- People value **courtesy, honesty, openness, and fair play.**
- Each of us has the ability and the responsibility to **find ways to improve what we do** and the way we do it.
- Every day, we need to improve what we do and the way we do it.
- **We all know** the basic elements of courtesy we need to practice on a regular basis. **Consistent positive communication** is the key to quality service.
- Remembering and **using a person's name** sends a strong positive message of acknowledgment.
- **People don't like to wait**, so prompt efficient service is quality service.
- **Everyone should be eager to respond to patients, doctors and affiliates of VRC regardless of status or position.**

- Compliments build confidence.
- The words we say are only a small part of how we communicate. **Actions also leave lasting impressions.**
- **Tone of voice** is a big part of communication.
- **Body language**—a smile, or making eye contact—is an important part of face-to-face communication.
- “Image” is made up of many things, but the most important factor is what we do and **how we handle interpersonal communication.**
- What people believe to be true about us is more important to them than what may be actually true.
- **Practicing warmth, friendliness, honesty, patience, tact, courtesy, and promptness** with others will result in positive responses from them.
- We must all set and consistently try to meet an individual standard of excellence.
- **Asking others about their needs** is quality service.
- **Listening carefully** is one method of providing quality service.
- **Asking questions and listening to the answers** makes our work easier.
- There are specific techniques we use on the telephone that convey respect and caring to patients and doctors.
- **Learning all we can about VRC and its specialties is our own responsibilities** makes our job easier.
- Satisfying the **needs of patients** is the most important objective of any Healthcare facility.
- **Everyone has some fear of interaction with others because everyone is afraid of negative responses.**
- We all deserve friendliness.
- “Patients” aren’t the only people coming into our facility. Everyone we deal with is a customer.
- We control the workplace environment.
- The workplace environment is critical to the success of any company.
- All of us respond to positive communication. **Positive communication is just as important with fellow employees as it is with our patients and doctors.**
- Warm, sincere “Positive Strokes” enhance the work environment.
- **Showing appreciation** to those we work for also improves the work environment.
- **Although complaints aren’t pleasant, they do tell us how we can improve.**
- Don’t be afraid to **take responsibility.**
- Don’t be afraid to **apologize.**
- If you can, explain why the problem occurred.
- Don’t challenge the complaint directly.
- Don’t allow yourself to be intimidated; remain cool, collected, courteous, and helpful.
- Don’t get involved in fault-finding.
- **Don’t blame** somebody else.
- Don’t let your personal feelings get in the way.
- Remember: The goal is to **solve the problem.**

CONTINUE THE CONVERSATION: GREAT BOOKS TO READ AND DISCUSS

1. Telephone Etiquette

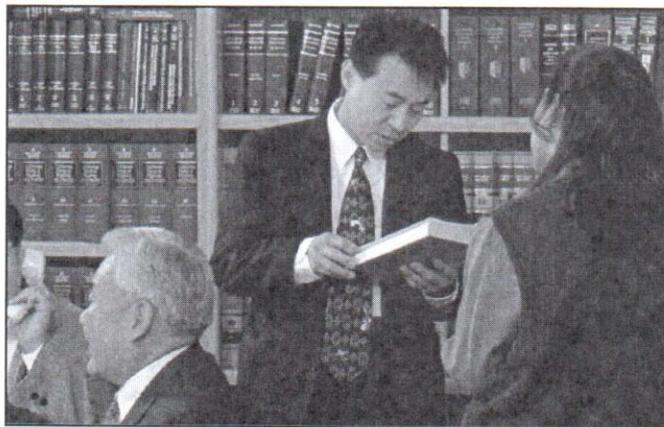
- Beyond Hello (Jeannie Davis)
- Telephone Skills from A to Z (Nancy Friedman)

2. Customer Service

- At America's Service (Karl Albrecht)
- Customer Service Training 101 (Renee Evenson)
- Delivering Knock Your Socks Off Service (Ron Zemke)
- Discovering the Soul of Service (Leonard Berry) □ Perfect Phrases for Customer Service (Robert Bacal)

3. Other Helpful Titles

- The 7 Habits of Highly Effective People (Stephen Covey)
- The Fine Art of Small Talk (Debra Fine)
- How to Win Friends and Influence People (Dale Carnegie)
- Spiritual Roots of Human Relations (Stephen Covey)



SMILE:

Framework for Customer Communication

PATIENT
CENTRIC
CULTURE



S

Share yourself.

- » Eye contact.
- » Your name.
- » Your role.

Goal: Establish trust by making a personal connection

- (In hallways) "May I help you find something? My name is Aaron and I work in Radiology. I will be glad to take you to where you need to go."
- "Hello Rudy (use preferred names whenever possible), my name is Jessica. I'm your _____ and I'm going to help you with any needs you may have."

M

Make it clear.

- » What's happening.
- » Why.
- » Who is involved.
- » What they need to do.
- » What you need from them.

Goal: Reduce anxiety by explaining

- "I am going to check on your pain by touching your stomach. It may be a bit uncomfortable, but we need to find out where it hurts."
- "Is it okay if I touch your arm while I talk with you?"
- "_____ will do a great job of helping you."
- "Dr. Anderson is a really caring surgeon—I think you'll like him."
- "What I need from you is _____."

I

Inform on timing.

- » How long it will take.
- » How long until the next caregiver comes by.
- » When people are waiting, aim to inform every 15 minutes.

Goal: Reduce anxiety by establishing time expectations

- "This should take about 10 minutes, and then the technician will come within the next 15 minutes."
- "I will be checking on you every hour to see about your needs. If you have a request before I return, please press this call button."
- "When can you do this? I need this by _____."
- "Would you prefer to reschedule your appointment?"

L

Listen with care.

- » Ask about needs and wants.
- » Summarize your understanding of feelings and concerns with empathy.
- » Answer questions in a caring manner.
- » Clarify requests by asking questions.

Goal: Establish trust by listening and involving the customer

- "What is the most important thing I can do for you today?"
- "I understand this is very difficult for you."
- "Insurance information can be very confusing...."
- "I realize how inconvenient it is for you to be in the hospital."
- "To make sure I understand: You'd like a phone call to your sister today and a chaplain visit tomorrow?"
- "I want to make sure you feel included in decisions about your treatment."

E

End with kindness.

- » Ask if there is anything else you can do.
- » Thank the customer for choosing PPH.

Goal: End the interaction with appreciation

- "It's been my pleasure to care for you. Is there anything else I can do?"
- "Thank you for your call."
- I appreciate your help. Let's confirm what we're each going to do."
- "We want to provide you with very good care."

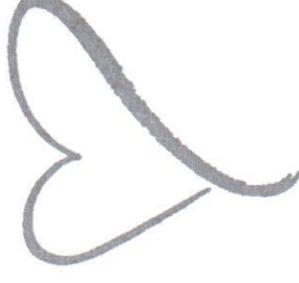
Handling Complaints with H.E.A.R.T.

Hear them out Let the patient vent; do NOT interrupt

- Stay objective Remain calm

Empathize - Put yourself in the upset person's place

- Learn what the patient expected
- Identify with the person's *feelings*



Acknowledge/Apologize - Let the person know you heard them

- Let them know you understand why they are upset

Review - Do not blame another person or department .

- Repeat what you heard.
- Offer a chair or private area if appropriate

Take responsibility - Let the individual know when you'll have a response/resolution

- Thank the person for the chance to work on the problem

How To Handle The Irate Customer

y Nancy Friedman

When you or a team member face a challenging customer complaint, often times, that complaint is more about validating the customer's emotions than the actual problem. Angry customers need you to acknowledge that they've been wronged, and they want your attention right away.

Use our ASAP technique to effectively diffuse and handle upset, angry, irate customers:

Apologize and acknowledge

Sympathize and empathize

Accept responsibility

Prepare to help.

Feelings are key. We need to apologize sincerely, immediately, and follow up with action. Insincere responses, such as "Oh, I'm sorry," won't help and could even cause additional damage. Imagine you were the customer with that experience, and ask yourself how you would want it handled.

Let's break it down step by step.

Suppose a customer calls in screaming, "I want my money back and I want it now. I'm sick and tired of all your mistakes!"

Your first response should be "A" – apologize and acknowledge – start by saying, *"I apologize for your inconvenience. No wonder you're upset."*

Then, follow this with an "S" – sympathy and empathy – response. Pretend it's you having the problem. How would you want to be dealt with? This part is crucial: *"I don't blame you for being upset. It's got to be very frustrating."*

Now that the caller is a little mollified, you can "A" — accept the responsibility – and reintroduce yourself. The reintroduction is very important: *"Let's see how I can help. My name is Paige, and I am speaking with?"*

And finally, "P" – prepare to help – be sure to demonstrate a sincere willingness to assist them. Remember to use the customer's name, this will further help diffuse their anger: *"Thanks, Mr. Perkins. Again, my name is Paige, and I'm here to help. Now, please, tell me, what happened?"*

Keep in mind that when you're dealing with an angry customer, you'll likely spend 80% of your time massaging the client's feelings and only about 20% actually solving the actual problem. Feelings are key. Most customers want sympathy or empathy almost as much as they want the problem fixed. It's frustrating to tell your complaint to someone who obviously doesn't care.

When you use the ASAP technique as your guidelines, you'll help diffuse an emotional situation and work to retain that customer.

Tell Em What You CAN Do

One of the most abrupt and shocking forbidden phrases you can say to a customer is, “We can’t do that.” These words close the door on the customer’s request as quickly as does its close cousin — “That’s our policy.” Everyone has heard the “We can’t” phrase before, and we’ve heard it used in situations in which we could imagine a reasonable alternative.

Telling customers “We can’t do that” doesn’t help them. It’s a dead end. Customers are only concerned with what you CAN do, not what you CAN’T do.

The solution is to remove the “We can’t” out of your vocabulary when speaking with a customer. Instead, offer suggestions of what you can do for them. We call this a positive alternative.

Consider this scenario in which someone calls their local government asking for help with a problem:



Eric: “Good afternoon, county assessor’s office. This is Eric.”

Customer: “Yes, I need to talk with your appraiser. I just received my new real estate tax bill and it’s way too high. Now, I work until a quarter to five, but I’m just a few blocks away. Can someone meet with me just after 5 o’clock.”

Eric: “Ohhh, we can’t do that.”

Here’s a far better way to handle this situation:

Eric’s positive alternative: “Well, here’s what we can do. We’re only open until 5, but let me transfer you to Mark Murphy. He’s one of our appraisers. He could meet with you over the lunch hour, or maybe you could get off work a couple of minutes early tomorrow. I’ll set it up for you. If you’re able to hold, I’ll transfer you to Mark.”

Here’s another example: A man calls a local retailer and asks if they have a particular sales item in stock.

“Yes. We still have three left. We’re open until 5:30 today,” the clerk replies.

“Unfortunately, I’m out of town on business today. Is there any way you could hold it for me until tomorrow morning? I’ll be in to get it.”

The clerk is aware their policy does not allow sale items to be placed on hold, but instead of saying, “We can’t do that,” the clerk responds with the positive alternative: “If you’ve got a moment, I’ll talk with my supervisor and see if we could take a credit card number from you over the phone. That way we could hold it until you pick it up.”

The important thing to remember is that every time someone repeats, “We can’t do that,” a customer likely is lost. The key is to replace that forbidden phrase with a positive alternative: “Here’s what we CAN do.”

Remember this theme, don’t tell them what you can’t do, tell them what you CAN do!

Customer Service vs. Common Sense?

By Nancy Friedman, Keynote Speaker, Customer Service Expert, President of Telephone Doctor Customer Service Training

We've all heard the saying: "Hey, customer service is just plain old common sense." But then we all know, too, common sense is NOT that common.

Decided to make a quick list of a few common sense things that aren't so common. See if you agree and love to have you 'add on' to the list. There are many more.

- * Cover your mouth when you yawn, cough or sneeze.
- * Say "you're welcome" vs. "no problem" when someone tells you "thank you."
- * Smile back at others.
- * Better yet. SMILE FIRST at others.
- * Write handwritten thank you notes when you receive a gift. Or get a new customer which is a gift! Save the text for a lunch date. Handwritten notes won't go out of style. Texting will eventually be replaced with something else.
- * Bump into someone at the mall, in the hall? Say, "Excuse me."
- * Remember you get more with sugar than you do with vinegar.
- * Stand up when a customer walks into your office or place of business. Greet the customer warmly.
- * Open doors for others. (Physically and emotionally as well.)
- * Eye contact is imperative for in-person customer service.
- * Make sure customers clearly understand what you're explaining. Repeating the same thing over and over isn't the way to do it. Change it up if it's not clear to them.

Ok, those are only a few of my "common sense" tips. Not in any order of importance and, yes, we have more, but like to hear your "common sense" customer service thoughts.