



Making every call count

*Specialist advisers
Julia Randall and Debbie Hooper*

*A video resource produced in the
United Kingdom by Fenman Limited*

● Create a good lasting impression with telephone contacts

● Learn to manage an inbound call effectively

● Develop the skills and attitudes to make positive outbound calls

● Understand the 5Gs of good telephone skills

● How to handle angry or abusive callers





TRAINER'S GUIDE

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Copyright – what you can and cannot do

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What you must not do, ever, is copy the DVD or the videos.

Firstly, because it is immoral, and secondly, because it is illegal. We do sue people we catch who have made copies of our products without consent and we do catch them, often years after the offence itself.

Theft of copyright material threatens the supply of training materials in future and it threatens the livelihood of people who develop training materials.

Thank you for buying this resource and for respecting our copyright.

DVD and VHS versions

Fenman Limited has made *Making every call count* available as both a DVD and as two VHS videotapes.

Throughout this Trainer's Guide rather than refer to both formats, DVD and/or videotape, we simply refer to 'video' as in 'Show the video'.

The content is the same in either format. DVD offers a number of advantages over VHS videotape.

The advantages include:

- physically more robust
- easier to carry and store
- far superior picture and sound quality
- can be played on DVD player, PC or Mac
- enables the trainer to jump to the exact frame required
- enables the trainer to play scenes in the order of their choice
- can be run on a computer, enabling the user to access word processing and other software at the same time.

We have taken advantage of some of the features of DVD to make your use of the programme easier. On starting the DVD, you will see a menu from which you can choose a number of options, including running the video in the

normal way. There are other options included that will enable you to jump to the scenes you require.

If you have purchased the VHS version, but would like to switch to DVD, you can do so at a special rate. Please contact our sales department (telephone +44 (0)1353 665533) for details.

About the advisers

Julia Randall and **Debbie Hooper** have been working with organisations for over 15 years to help them meet their objectives. Much of their work is within blue-chip environments where they have structured and developed departments and worked with the teams and their managers to improve operational performance through communication skills. They are skilled at building bespoke solutions across a wide range of operational and individual development needs.

Julia Randall LAMDA

Following a successful career in management in both the UK and overseas, Julia began operating as an independent consultant in 1993, working in both private and public sector organisations. Julia's preference is for interactive training in which participants are encouraged to learn in a supportive environment. This ensures that training is enjoyable, has tangible outcomes and, most importantly, is transferred effectively back to the workplace. In consultancy projects, Julia prefers to work closely with the client to identify and meet the real issues and to design, implement and evaluate the solutions which will make a real impact on both the organisation as a whole and the individuals within it. Julia is a qualified voice coach and is currently studying for an MBA.

Debbie Hooper MBA, MSc

Since 1992, Debbie has been operating as an independent consultant providing consultancy and the design and delivery of training interventions for all staff levels across a range of private and public industry sectors. During this time she has established long-term client relationships in helping to provide strategic direction. Her corporate background as a manager has enabled her to develop theories to provide workable management solutions. Debbie provides learning experiences, which enable the individual to apply the skills, learned in the workplace to their benefit and the overall benefit of the organisation.

Together, Julia and Debbie have worked with the team in the preparation of this video-based training programme to provide you with a practical approach to improving communication skills over the telephone, whatever the role it plays in your working life.

Introduction to *Making every call count*

The Fenman resource, *Making every call count* comprises one DVD or two VHS videotapes. Part 1 of the video focuses on taking inbound calls, while Part 2 builds on this learning and introduces how to manage more complex calls as well as outlining the principles of making outbound calls.

The two videotapes can be used individually or as parts one and two of a longer learning intervention. The programme has this comprehensive Trainer's Guide which can be used to facilitate a variety of short or longer training sessions. This Trainer's Guide includes activities and masters for handouts and OHTs.

Making every call count can be used as:

- A resource for stand-alone training interventions which focus on improving telephone usage by improving skills, behaviours and techniques in the workplace.
- A vehicle to develop the skills of existing telephone users.
- An introduction to best practice in telephone use.
- A method to reinforce standard protocols or best practice in telephone use across an organisation.
- Part of an induction programme for new staff or managers.

Additionally, *Making every call count* can be used as an integral part of longer programmes which consider broader issues of workplace communications and communication skills.

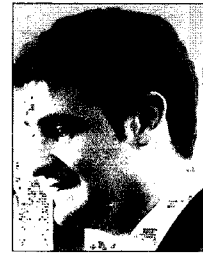
Structure of the programme

The programme is divided into two parts, each on a separate videotape; the two parts can either be viewed separately, or in conjunction with each other.

The programme illustrates a series of 'real' workplace scenarios where effective telephone skills are vital to business and communication. It features internal and external calls between colleagues, clients and suppliers.

The drama is set in the Head Office of a company called Hayman-Knight. A communications consultant has been invited by a senior manager to assess and improve telephone use throughout the company. As the consultant meets managers and staff, he comments on practices observed and overheard. Through these conversations, the key learning points are brought out in a meaningful and relevant way. We see people improving their skills throughout the drama, and situations brought to effective conclusions.

Main characters



Ken Davies

A communication consultant in his early forties. Ken is a highly professional facilitator and encourager of people, who uses a collaborative style in communication.



Liz Reynolds

Liz is a senior manager at Head Office; an embracer of new ideas, supportive of her staff and with a genuine desire to see improvements in the company. She has been one year in the job, having come from the same company as Ken prior to this.



Helen Caswell

Head Office Receptionist. Smart, friendly and outgoing.



Barry Gordon

IT Manager, Head Office. Highly competent in his field, but with limited people skills.



Ana Khan
Midlands/Northern Area Office Manager.
Cheerful and efficient, but vulnerable when
out of her depth.



Phil Clarke
A member of the Field Sales Team based at
Head Office. A charming and shrewd
operator, razor-sharp in his business
dealings.



Sue Riley
A sales administrator based at Head Office.
Sue is competent and keen to please, but
also a worrier.

Learning overview

Part 1 of ***Making every call count*** focuses on the telephone behaviours necessary to deal effectively with incoming calls. It begins by considering the key telephone behaviours:

- Focusing on the call
- Preparing for calls
- Best practice
- Treating every caller as an individual
- Controlling the call.

A call structure is then introduced which may be followed for incoming calls using both fixed line and mobile phones:

The 5 Gs

- Greeting
- Gathering information
- Generating options
- Gaining agreement
- Giving a lasting impression.

This section of the programme provides a comprehensive introduction to, or review of, fundamental principles and their use in the workplace.

Part 2 of ***Making every call count*** can be used to further develop these skills or, where foundation skills are already in place, to consider more complex calls and outbound calling. It begins with a review of core skills and progresses to consider the principles of dealing with difficult calls:

- Preparation
- Gaining control
- Identifying the facts
- Acknowledging emotion
- Mirroring, pacing, leading
- Owning the call
- Stating what you can do, and what you can't
- When to apologise
- Ending the call on a positive note.

Specific 'difficult' calls are considered in more detail with skills and techniques for effectively managing:

- Distressed callers
- Delivering bad news
- Angry callers.

The final element introduces the stages and key skills required for making outbound calls:

- Getting ready – preparation and planning
- Getting started – opening an outbound call
- Getting going – gaining and presenting information
- Getting commitment – closing the call effectively.

Who will benefit from the programme?

Anyone who uses the telephone can benefit from this programme.

The drama videos present examples from all levels of staff and management, and the training material is purposely designed to be broad in its scope. It therefore follows that ***Making every call count*** can be used with ***all*** levels of employees.

Objectives of the programme

By the end of Part 1 of the programme participants will:

- Understand the key behaviours required to manage an inbound telephone call effectively.
- Know the stages of an inbound call.
- Be able to demonstrate the skills, actions and behaviours required to conduct an inbound call.

By the end of Part 2 of the programme participants will:

- Understand and be able to demonstrate the basic principles for handling difficult calls.
- Have explored the skills required for managing distressed or angry callers and to deliver bad news effectively.
- Know the stages of an outbound call.
- Be able to demonstrate the skills, actions and behaviours required to make an effective outbound call.

The learning is designed to relate closely to participants' own work settings. This means that learning can be easily and effectively transferred back to the workplace.

The training materials

The programme is supported by this comprehensive Trainer's Guide. The Guide takes you through a step-by-step training session which includes suggested timings, exercises, how to use the drama clips and any support material needed at each stage. These sessions can be run as presented, or as a platform for developing customised training. Participants' handouts and OHT masters are provided for each element of the learning.

Two options are provided for each part: a 90-minute training session and a 3-hour session. This allows you great flexibility of use. The materials are integrated into the Trainer's Guide so that you can select or omit sections appropriately for your participants.

The sessions are designed for groups of 8 to 10 participants. Smaller or larger groups can be accommodated with timings adjusted accordingly.

Required resources

- ***Making every call count*** DVD or videotapes
- Training or meeting room suitable for group size
- Equipment to play the programme
- Flipchart and stand
- Flipchart paper for participants
- Marker pens for trainer and participants
- Paper and pens for participants
- Copies of handouts for all participants
- Copies of OHTs
- Equipment to project overhead transparencies.

Your preparation

- Watch the ***Making every call count*** DVD or videos.
- Study the content of the Trainer's Guide and ensure that you are fully familiar with this and the learning points.
- Plan your own introduction to the sessions.
- Prepare sufficient copies of the handouts.
- Prepare a set of OHTs.
- Prepare flipchart sheets for the exercises.

Using the Trainer's Guide

The Trainer's Guide is produced in landscape format to provide an at-a-glance view of each element.

- Timings are given for a 3-hour training session (in the first column) and a 90-minute session (in the second column).
- The duration of each section is given in the third column.
- The 'Section and actions' column provides the title for each section within the session and goes on to detail the exercises and learning points addressed within each section. Examples and references to relevant scenes in the programme are provided together with suggested comment. These can be used as they stand, or adapted to reflect your requirements, the group's requirements and the time available.

- The 'Resources' column lists other material – video clips, handouts or OHTs to be used in each section.

The design of this comprehensive Trainer's Guide means that it can be used 'off the page', or adapted and customised by a more experienced facilitator.

Making every call count – Part 1 Session notes

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
00.00	00.00	10 minutes in the 3-hour session 5 minutes in the 90-minute session	<p>Introductions Introduce yourself and facilitate personal introductions which are relevant and appropriate to the group.</p>	
00.10	00.05	5 minutes	<p>Session overview and learning objectives Introduce and set the training in context.</p> <p>Explain that the training session:</p> <ul style="list-style-type: none"> • Is designed to improve telephone use by looking at key behaviours and skills needed to conduct effective telephone calls at work. • Will last for either 90 minutes or 3 hours (depending on the duration chosen). • Will include watching a video which will illustrate the learning points by showing telephone techniques in a work setting. • Will include some short exercises for participants to take part in with partners, or in small groups, in order to put the learning into context. <p>Show OHT 1 Learning objectives Talk through the objectives and say that by the end of the session, participants will:</p>	OHT 1

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Understand and be able to demonstrate the key behaviours required to manage an inbound telephone call effectively.</i> • <i>Be able to identify the stages of an inbound call.</i> • <i>Have practised and demonstrated the core skills required to control an inbound call.</i> <p>Make the point that although most people use the telephone regularly, there is often room for improvement – as will be shown in the video, and that the learning is geared towards providing participants with practical skills and techniques which they can use in their own workplace.</p>	
00.15	00.10	15 minutes in the 3-hour session 10 minutes in the 90-minute session	<p>Positive and negative experiences Ask participants to think about telephone calls they have made to companies and how these have been handled by the call taker.</p> <p>Divide participants into two groups.</p> <p>Give each group a supply of flipchart paper and marker pens.</p> <p>Ask each group to brainstorm a list of positive and negative telephone behaviours they have experienced when they have made calls; get them to think about the way their inbound call was handled.</p> <p>Ask them to generate as many points as possible rather than spending time discussing experiences in detail.</p>	Flipchart paper and marker pens

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<p>Examples might include:</p> <p><i>Positives</i></p> <ul style="list-style-type: none"> • Hearing a friendly voice from a person who treats you like an individual, not just another caller • Someone who genuinely seems to want to help and keeps you informed • Someone who listens to you and gives you an honest answer. <p><i>Negatives</i></p> <ul style="list-style-type: none"> • Not knowing if you are through to the right person because they don't give their name or they mumble it • Hearing 'sing-song' words which sound as if the person's reading a script • Having your call passed around several people and having to repeat what you want over and over again. <p>Reconvene the whole group and briefly review lists. Comment briefly on the points generated and summarise, indicating that the remainder of the session will be focusing on enhancing the positives and eliminating the negatives.</p>	
00.30	00.20	25 minutes	<p>Getting the basics right</p> <p>Tell the group that you are now going to show them a video in which they will see some of the actions and behaviours they have identified from their own experiences.</p> <p>Say that after the video you will be reviewing the learning points and relating these to their own situations. Invite participants to make notes if they wish.</p>	<p>Video Part 1</p> <p>Paper and pens</p>

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
00.50	00.45	5 minutes	<p>Overview of learning – Positive telephone behaviours Review the key learning points from the video.</p> <p>Show <i>OHT 2 Positive telephone behaviours</i>, and briefly discuss. Include the following points:</p> <ul style="list-style-type: none"> • <i>Focus on the call before you answer it</i> – Pause and take a breath, mentally prepare for the call; you don't know who it might be or what it might be about. Don't do as Barry did when he took the first call from Ana while he was still looking at his PC. • <i>Prepare – have systems and paper and pen ready</i> – Be physically prepared, with things you're likely to need at hand. It's very unprofessional to have to scabble for a pen (like Barry when he took calls on his mobile). Be prepared, as Ana was when Joe rang back about the cleaning contract. • <i>Answer the call in three to four rings</i> – This allows you and the caller to prepare without keeping them waiting. Often, if you pick up a call too quickly, your caller isn't ready to speak or listen. • <i>Ignore or remove distractions</i> – Don't try to do two things at once (as Helen tried to do with the despatch rider). Politely indicate to anyone who tries to interrupt that you are on a call, as Helen did with her colleague. • <i>Treat every caller as an individual</i> – Concentrate on the caller and demonstrate that you are listening. Use the caller's name appropriately (as Helen did when she was talking to Joe and transferring his call). 	<i>OHT 2</i>

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Control the call</i> – Take the initiative early on, asking questions and summarising so that you can help the caller and bring the call to a positive conclusion. (As demonstrated by Ana in her conversations with Joe.) 	
00.55	00.50	5 minutes	<p>Overview of learning – call structure Show <i>OHT3 Call structure – The 5 Gs</i>, and amplify each point. Refer to the final call received by Phil from Jane which summarises the learning points. You may choose to include the following comments:</p> <ul style="list-style-type: none"> • <i>Greeting</i> – Speak clearly and sound professional; you are creating a first impression; so make sure it is a positive one. (Say that you will be covering the greeting in more detail later.) • <i>Gathering information</i> – Find out what the caller wants or needs to know. Don't make assumptions about what the call is about. Summarise your understanding of the situation. • <i>Generating options</i> – Offer the caller alternatives: for example, asking if they want to leave a message or call back later, rather than just saying that someone is not available. This way the caller feels they can make choices, rather than having a solution imposed on them. • <i>Gaining agreement</i> – Involve the caller in the decision making and summarise what you have agreed. 	OHT 3

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Giving a lasting impression</i> – End on a positive note. Don't end on an apology or by using phrases like 'any problems, give me a call', as this can plant negative thoughts in the caller's mind. Create confidence in yourself and your organisation, so that the caller knows that you will do what you have agreed. <p>Invite and respond to any other suggestions and questions.</p>	
01.00	00.55	10 minutes	<p>Greeting Indicate that you are now going to consider the greeting in more detail and apply the learning to participants' own situations. Ask for a couple of examples of what people currently say when they pick up the telephone at work. Review these against the elements of the greeting on OHT 4 Greeting.</p> <p>Say that the greeting should include the following elements:</p> <ul style="list-style-type: none"> • <i>Welcome</i> – for example, 'Good morning' or 'Good Afternoon'. This is both polite and allows the caller to 'tune in' to your voice. • <i>Introduction</i> – for example, 'Thank you for calling Hayman-Knight'. This lets the caller know who they are connected to. • <i>Invitation</i> – for example, 'How can I help you?'. This gives the impression that you want to take their call and indicates to the caller that it is their turn to speak. <p>Take into account any 'company standard' elements to corporate call openings.</p> <ul style="list-style-type: none"> • <i>Be positive</i> – Make the greeting sound professional, not sing-song or monotone. 	OHT 4

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Keep focused</i> – Think about talking to a ‘real person’ rather than just a disembodied voice. • <i>Treat each call as the first call of the day</i> – A cliché, but true. That’s why being mentally prepared is important. Callers can hear in your voice if you sound bored or distracted. <p>Greeting practice and application Discuss the points about using your name in the greeting (as seen in the discussion between Liz and Ken) and take this into account for participants’ own situations. Divide participants into pairs and ask them to apply the learning points to their own call greeting. Say that you will be asking them to practise their call greeting with a partner who will comment on how it sounds. Show the following points on a sheet of flipchart paper (this can be prepared in advance) which will act as a checklist for feedback:</p> <ul style="list-style-type: none"> • Was the greeting spoken clearly? • Was it about the right speed – too fast or too slow? • Did it sound positive, bored or sing-song? • Did it contain all the elements of the greeting? <p>Each person should sit back to back with their partner (to replicate the fact that they cannot be seen on the telephone) and say their greeting to their partner. Their partner should comment on how it sounds using the points on the flipchart sheet as a checklist for feedback. Each person should practise with their partner until they have all perfected a good greeting which they can use in their work situation. Briefly review in the plenary group, asking for one or two good examples from participants.</p>	<p>Prepared flipchart sheet</p>

Timing 3-hour session	Timing 90-minute session	Duration	Section and actions	Resources
01.10		10 minutes	<p>Learning review – gathering information Show OHT 5 Gathering information, and briefly cover the key points. The following is provided for additional comment:</p> <ul style="list-style-type: none"> • <i>Listen to the caller's reason for calling</i> – Refer to Barry's poor listening when he was taking down Ana's requirements for the new PC and how this impacted on what followed. • <i>Summarise your understanding</i> – This gives you the opportunity to clarify your understanding and for the caller to correct or add information. • <i>Give your name and ask for theirs</i> – This sounds more conversational and personalised than giving your name in the greeting. Ken and Liz discussed this following the call in which Helen first spoke to Joe. • <i>Ask questions effectively</i> – Use open questions to gather information and closed questions to confirm. • <i>Listen to the answers</i> – demonstrate you are listening using 'verbal nods' like 'mmm hum', or confirming words like 'yes', 'I see', 'fine', and so on. Don't repeat the same confirmation too many times, as it can sound robotic and give the impression that you are <i>not</i> really listening. • <i>Ask if there is anything else they would like help with today</i> – this was seen in the call between Ana and Joe and discussed by Ken and Liz. It's better to ask this earlier in the call rather than have it sound like an insincere add on at the end. 	OHT 5

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Explore any new requests</i> – This is your opportunity to exceed the caller’s initial expectations, provide additional information or offer extra help. <p>Explain that because on the telephone there are no visual clues, verbal and listening skills need to be enhanced. Effective listening and questioning skills are paramount. (Refer back to poor listening demonstrated in the video – for example, early conversations between Barry and Ana about her computer requirements.) If you aren’t listening fully to what the caller says, you may find it difficult to progress the call effectively.</p>	
01.20		20 minutes	<p>Listening skills Ask how good participants think they are at listening. Then read the following passage:</p> <p><i>Pat and Chris work for LEC Limited. They are in the office talking about the football match they’d been to the previous evening. Pat supports United and Chris supports City. The telephone rings and Chris takes the call. It’s from Sam from Head Office. Sam wants to know when the best time will be to deliver some new desks. Chris says that they should be delivered to the depot and not the offices.</i></p> <p>Now say that you are going to read out some statements about the passage. Ask participants to choose one of the following responses:</p> <p>4 if the statement is true 8 if the statement is false ? if there is insufficient information to know whether the statement is true or false.</p>	Paper and pens

Timing 3-hour session	Timing 90-minute session	Duration	Section and actions	Resources
			<p>Ask participants not to discuss their responses but to write down their answers.</p> <p>Statements:</p> <ol style="list-style-type: none"> 1. The two men were talking about a football match. 2. The football match was between City and United. 3. Sam spoke to Chris on the telephone. 4. Pat works for head office. 5. Chris works in the depot. 6. The desks are to be delivered to the offices. 7. Sam will deliver the desks. 8. Chris and Pat work for ELC Limited. <p>Now go through the correct answers:</p> <ol style="list-style-type: none"> 1. ? We don't know if Pat and Chris are male or female. 2. ? We are told that Pat and Chris support these teams, but not who played in the match they attended. 3. 4 Chris took the call from Sam. 4. ? We're not given this information. 5. ? We're not given this information. 6. 8 Chris told Sam that the desks should be delivered to the depot. 7. ? We're not given this information. 8. 8 Chris and Pat work for LEC Limited. <p>Discuss the implications of making incorrect responses and note the key points on a sheet of flipchart paper. Discussion should include the importance of listening carefully. Include points like:</p> <ul style="list-style-type: none"> • It's easy to transpose information (like ELC for LEC) • Don't make assumptions, or think you know what people are going to say. 	<p>Flipchart paper</p>


Timing 3-hour session	Timing 90-minute session	Duration	Section and actions	Resources
			<p>Barriers to listening</p> <p>Ask what sort of things act as barriers to listening, especially on the telephone. Generate a list on a sheet of flipchart paper which could include points such as:</p> <ul style="list-style-type: none"> • Background noise • Interruptions • Poor line (interference) • Making assumptions • Thinking you know already know what someone wants • Being put off by the person's voice • Not being able to understand what they are saying • Being hungry or thirsty • Reacting to the first part of what someone says without hearing the whole of their request. <p>Group activity</p> <p>Divide participants into two groups and divide the points equally between them. Ask them to generate ways to overcome these barriers. Examples could include:</p> <ul style="list-style-type: none"> • Keeping an open mind as to what is being said • Listening actively to <i>what</i> is being said, and not just the sound of someone's voice • Politely indicating that you do not wish to be interrupted, or telling colleagues not to interrupt while you're taking calls. <p>Each group should present back their findings to the other group. Review key points.</p>	<p>Flipchart paper</p>

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
01.40		15 minutes	<p>Questioning skills Summarise the difference between open and closed questions by showing <i>OHT 6 Questioning skills</i>.</p> <p>Highlight the uses of both, and the importance of using a mixture of open and closed questions during a telephone conversation. Mention the following:</p> <ul style="list-style-type: none"> • <i>Open questions invite informative answers</i>; for example, 'What sort of services can you provide?' will allow the speaker to give you information. When you are gathering information from a caller, open questions can be useful to find out what they want. Although not technically questions, phrases like 'Tell me ...' are also useful to gather information. • <i>Closed questions</i>, for example, 'Do you do flower arranging?' will get only a Yes or No answer. This can be useful for confirming information or understanding. • A mixture of open and closed questions should be used, depending on whether you wish to gain or confirm information. <p>Questioning exercise Divide participants into pairs.</p> <p>Ask each person to take turns to find out as much as they can about their partner's job. At the end of the conversation (lasting no more than 2 minutes), the pair should review the types of questions asked and how effective they were in either eliciting or confirming information.</p>	OHT 6

Timing 3-hour session	Timing 90-minute session	Duration	Section and actions	Resources
			<p>Review in the plenary group by asking for examples of questions which were useful and those which were less so. Look for, and highlight, the use of open questions at the beginning of the conversations to 'open up' the subject and invite the other person to talk.</p> <p>Examples might include questions like 'What do you do in the production department?' which can be followed by other open (probing) questions to gain more information: for example, 'That's interesting. What sort of companies use the widgets you make?'</p> <p>Look for the use of closed questions to clarify or confirm information, for example, 'So it's your team that makes the big green widgets, is it?' If closed questions are used too early in this type of conversation, it is difficult to gather information and expand or get going. Poor examples might include questions like 'Do you work in the production department?' which, after a Yes or No answer can lead to further closed questions which may sound inquisitorial.</p>	
01.55		10 minutes	<p>Summarising Now ask each person to note down a short summary (one sentence) of the key information they gained from their partner. Have their partner (the originator of the information) critique the summary for accuracy.</p> <p>Review in the plenary group by asking for examples of accurate, concise summaries. These should include the key information only: for example, exactly what the person does, which department they work in, what their job entails, and so on, and should filter out any extraneous details which may have legitimately been included in the original conversation.</p>	Paper and pens

Timing 3-hour session	Timing 90-minute session	Duration	Section and actions	Resources
02.05			<p>An example of this stage might be:</p> <p>“So we’ve agreed that the meeting will be on Tuesday afternoon at 3p.m. <i>(Confirming)</i> We can talk through the report from last month and then go on to this month’s objectives. <i>(Summarising the key steps)</i> I’ll book a meeting room and you will e-mail the first draft to me. <i>(Restate what happens next)</i> Let me give you my e-mail address ... <i>(Give information to be recorded)</i> Elements of this stage were seen in the video during later conversations between Barry and Ana about the PC installation.</p> <p>Go through the final call stage, using OHT 9 Giving a lasting impression. Refer to the final element of the call Phil received at the end of the video and Ken’s comments about it.</p> <ul style="list-style-type: none"> • <i>Thank the caller for their business or call</i> – A genuine thank you rather than a glib sounding ‘thank you for calling’. • <i>Use a positive voice</i> – Sound interested and reassuring. • <i>End on thank you – not an apology</i> – If the call was a complaint, or was about a mistake, this should have been addressed and resolved earlier in the call. There is no need to reiterate the apology at the end of the call and end on a potentially negative note. <i>(This is covered in more detail in Part 2.)</i> • <i>Allow the other person to end the call first</i> – This is polite and also allows the caller to add any further information or questions which may only have just occurred to them. 	OHT 9

Timing 3-hour session	Timing 90-minute session	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Carry out actions that you have agreed</i> – Although the caller won't see you doing this, if you have created the right impression, they will have confidence in you doing what you have agreed. Always remember to do this! 	
2.15	1.05	5 minutes	<p>Mobile protocols and leaving a message Remind the participants that the same 'rules' apply to using a mobile as using a fixed-line telephone in the office. Say that it's easy to forget the basic principles when you are on the move or away from your desk. You should still prepare to take the call in a professional manner.</p> <p>Reiterate points from the greeting about making it sound welcoming and professional (as seen when Phil takes a call on his mobile in his car – he still says 'Hello, Phil Clarke, Hayman-Knight Sales ...')</p> <p>Highlight the point about eating and drinking whilst on the telephone – this it to be avoided in <i>all</i> situations.</p> <p>Show OHT 10 Leaving a message, and amplify the points as demonstrated by Phil when he left a message for Les about the trade stand (and not like Les' first message!).</p> <ul style="list-style-type: none"> • <i>Give your name</i> – To let the person know who the message is from. • <i>Clearly and concisely explain the purpose of the call</i> – If you are returning a call, say what it was about; if this is a new call, briefly state what you want to talk about, for example, 'I want to talk about the meeting on Wednesday'. This gives the recipient an indication of any information they might need before calling you back. 	OHT 10

Timing 3-hour session	Timing 90-minute session	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Leave your number</i> – Unless you are certain that the person has your number, leave it in the message. Speak slowly as they may need to write it down. If they know your contact details, give an indication of whether you want them to call you on, say, your mobile or office number. • <i>Explain what will happen next</i> – Say what you will do next or what you'd like them to do next. This might be that you will try to call them later, or that you would like them to call you or action something on your behalf. • <i>End the message</i> – A brief thank you or good bye, or similar, is usually fine: Phil said 'Glad to help' which creates a positive end to a message. Remember that the 'lasting impression' is important in messages as well as conversations. 	
2.20		10 minutes	<p>Leaving a message exercise Refer back to the message which Les left on Phil's mobile voice mail. The text of this in Handout 1 Leaving a message.</p> <p>Divide participants into pairs and give each pair a copy of the handout. Ask them, in their pairs to paraphrase Les' message so that it conforms to the points above.</p> <p>Answers may vary, but all should be short and to the point and contain only the relevant information. Refer back to the summarising exercise earlier – the same principles of selecting only the key information apply.</p>	Handout 1 and pens

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<p>A sample of a 'good' answer is below:</p> <p><i>'Hello Phil, it's Les Swan. Could you give me the number for the conference organisers who arrange the trade fair stands we were talking about last week please? Can you call me on my mobile please? Thanks.'</i></p> <p>Allow 5 minutes for pairs to complete this activity and then ask for a couple of examples to be read out to the rest of the group. Highlight any particularly good answers.</p>	
02.30	01.10	15 minutes for 3-hour session and 10 minutes for 90-minute session	<p>Practical application</p> <p>Ask each participant to think of a scenario which replicates the type of call they would normally take at work. This will be used to role-play a call with another participant. The purpose of having the participants design their own role-plays is to inject some realism into the exercise. The role-play framework is provided in <i>Handout 2 Inbound call role-play framework</i>, to guide participants through designing their own role-play. <i>You may wish to prepare some role-play briefs if you know the participants' work roles.</i></p> <p>Put participants into triads – one caller, one call taker and one observer. The call taker should brief their caller on their scenario and then role-play the call. The caller and call taker should sit back to back, so that there are no visual cues during the conversation. The observer should note what was done well by the call taker and areas in which they could improve. After the role-play, the observer gives their feedback.</p>	<i>Handout 2</i> and pens

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<p>The triads rotate through each role, so that all have a turn at practising call taking.</p> <p>Role-plays can take place simultaneously to avoid the 'goldfish bowl' effect; the background noise of other role-plays merely replicates the reality of a busy office environment. You should circulate among the triads and offer support as needed while the role-plays are being conducted.</p> <p>When all the role-plays have been completed, ask the triads to elect a spokesperson to present back a summary of performance in the plenary group.</p> <p>Consolidate the learning points and add clarification as required. Review the calls briefly and ask each person to identify one learning point from their own role-plays in terms of something they will do differently when they are back at work. Collect suggestions on a sheet of flipchart paper under the following headings:</p> <ul style="list-style-type: none"> • I will start ... • I will stop ... <p>Distribute <i>Handout 3 Positive telephone behaviours and call structure</i>, to consolidate learning, and for participants to take away as a reminder of the key learning points.</p>	<p><i>Handout 3</i></p>

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
02.45	1.20	5 minutes	<p>Learning review Briefly review the learning points from the session using OHT 2 Positive telephone behaviours, as follows:</p> <ul style="list-style-type: none"> • <i>Focus on the call before you answer it</i> – Pause and take a breath; mentally prepare for the call. • <i>Prepare – have systems and paper and pen ready</i> – Be physically prepared, with things you’re likely to need at hand. • <i>Answer the call in three to four rings</i> – This allows you and the caller to prepare without keeping them waiting. • <i>Ignore or remove distractions</i> – Don’t try to do two things at once. • <i>Treat every caller as an individual</i> – Concentrate on the caller and demonstrate that you are listening. • <i>Control the call</i> – Take the initiative early on; asking questions and summarising so that you can help the caller and bring the call to a positive conclusion. <p>And OHT 3 Call structure – The 5 Gs, as follows:</p> <ul style="list-style-type: none"> • Greeting – Speak clearly and sound professional; you are creating a positive first impression. • Gathering information – Find out what the caller wants or needs to know, and don’t make assumptions. • Generating options – Offer the caller alternatives so that they can make choices. • Gaining agreement – Involve the caller in the decision making and summarise what you have agreed. • Giving a lasting impression – End on a positive note and create confidence in you and your organisation. 	<p>OHT 2</p> <p>OHT 3</p>

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
2.50		5 minutes	<p>Action planning Distribute <i>Handout 4 Action Plan</i>. Ask participants to note down their personal action points from the session by identifying changes they will make to the way they take calls in future. Ask each participant to note down something they will <i>start</i> doing and something they will <i>stop</i> doing as a result of the training session.</p>	<i>Handout 4</i> and pens
02.55	1.25	5 minutes	<p>Close session Ask for, and respond to, any final questions. Thank participants and bring the session to a close.</p>	
03.00	1.30			

Making every call count – Part 2 Session notes

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
00.00	00.00	10 minutes in the 3-hour session 5 minutes in the 90-minute session	<p>Introductions Introduce yourself and facilitate personal introductions which are relevant and appropriate to the group.</p>	
00.10	00.05	5 minutes	<p>Session overview and learning objectives Introduce and set the training in context.</p> <p>Explain that the training session:</p> <ul style="list-style-type: none"> • Is designed to improve telephone use by reviewing the key behaviours and skills needed to conduct effective telephone calls at work. It then builds on basic principles to address how to manage difficult and outbound calls. • Will last for either 90 minutes or 3 hours (depending on the duration chosen). • Will include watching a video which will illustrate the learning points by showing telephone skills in a work setting. • Will include some short exercises for participants to take part in with partners, or in small groups, in order to put the learning into context. <p>Show OHT 11 Learning objectives</p>	OHT 11

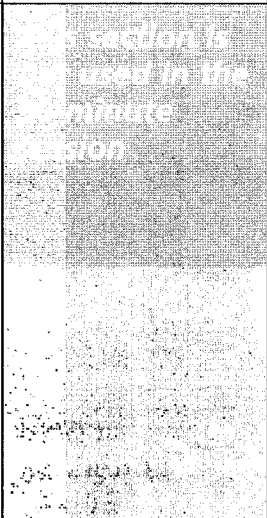
Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<p>Talk through the objectives and say that by the end of the session, participants will:</p> <ul style="list-style-type: none"> • <i>Have reviewed the behaviours and skills required to deal effectively with inbound calls.</i> • <i>Understand and be able to demonstrate the basic principles for handling difficult calls.</i> • <i>Have explored the skills required for managing distressed or angry callers and to deliver bad news.</i> • <i>Know the stages of an outbound call.</i> • <i>Be able to demonstrate the skills, actions and behaviours required to make an effective outbound call.</i> <p>The session is designed to build on the learning from Part 1 or to be used with those already competent in basic inbound skills.</p>	
00.15	00.10	10 minutes in the 3-hour session 5 minutes in the 90-minute session	<p>Review of basic principles of inbound calling If participants have already attended a session using Part 1 of the video, introduce this as a review, otherwise use it as a reminder of basic principles.</p> <p>Show OHT 2 Positive telephone behaviours. Talk through telephone behaviours as follows:</p> <ul style="list-style-type: none"> • <i>Focus on the call before you answer it – Pause and take a breath, mentally prepare for the call; you don't know who it might be or what it might be about.</i> • <i>Prepare – have systems and paper and pen ready – Be physically prepared, with things you're likely to need at hand.</i> 	OHT 2

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Answer the call in three to four rings</i> – This allows you and the caller to prepare without keeping them waiting. Often, if you pick up a call too quickly, your caller isn't ready to speak or listen. • <i>Ignore or remove distractions</i> – Don't try to do two things at once. Politely indicate to anyone who tries to interrupt that you are on a call. • <i>Treat every caller as an individual</i> – Concentrate on the caller and demonstrate that you are listening. Use the caller's name appropriately. • <i>Control the call</i> – Take the initiative early on, asking questions and summarising, so that you can help the caller and bring the call to a positive conclusion. <p>Show OHT 3 Call structure – The 5 Gs, and amplify each point. You may choose to include the following comments:</p> <ul style="list-style-type: none"> • Greeting – Speak clearly and sound professional; you are creating a first impression, so make sure it is a positive one. • Gathering information – Find out what the caller wants or needs to know. Don't make assumptions about what the call is about. Summarise your understanding of the situation. • Generating options – Offer the caller alternatives: for example, asking if they want to leave a message or call back later, rather than just saying that someone is not available. This way the caller feels they can make choices, rather than having a solution imposed on them. 	

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Gaining agreement</i> – Involve the caller in the decision making and summarise what you have agreed. • <i>Giving a lasting impression</i> – End on a positive note. Don't end on an apology or by using phrases like 'any problems, give me a call', as this can plant negative thoughts in the caller's mind. Create confidence in yourself and your organisation, so that the caller knows that you will do what you have agreed. 	
00.25	00.15	5 minutes	<p>Review of basic call techniques Show the first section of the video (from the beginning to the end of the 'flashback' call where Ken is speaking to Helen to confirm the arrangements for his meeting with Liz) to illustrate these points.</p>	Video Part 2
00.30	00.20	15 minutes in the 3-hour session 10 minutes in the 90-minute session	<p>Difficult call types Say that you are now going to move on to handling more difficult calls and outbound calls.</p> <p>Divide participants into two groups, give each group a supply of flipchart paper and marker pens, and ask them to identify the types of calls they make or take which could be described as 'difficult'. These might be calls from 'difficult people' – those who are angry or complaining, for example, or 'difficult situations', such as where you have to apologise for a mistake, or tell someone that their requests cannot be met.</p> <p>Ask each group to generate a list, indicating specifically what it is about each call type which makes it potentially difficult to handle, and present this back to the rest of the group. This might include points like:</p>	Flipchart paper and marker pens

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • If someone's angry, you can tend to take it personally. • It can be hard to get the key information if someone's ranting or upset. • I don't like feeling I'm letting someone down if I can't do exactly what they want. <p>Review in the plenary group and say that you're now going to watch the next section of the video which illustrates some of the behaviours and demonstrates how these can be managed effectively.</p>	
00.45	00.30	15 minutes	<p>Managing difficult calls Show the second section of the video which illustrates handling difficult calls. This continues straight on from the previous section. It begins with Ken and Liz in the lift talking about tackling more difficult calls, and ends with Liz and Ken talking to Barry about the call he's made to Ana, in which he took responsibility for his mistake.</p> <p>Indicate where specific examples relate to those given by participants in the previous exercise. (These will depend on the points they raised). Say that you are now going to look at the specific principles in more detail.</p>	Video Part 2
01.00	00.45	5 minutes	<p>Managing difficult calls – basic principles Talk through <i>OHT 12 Dealing with difficult calls</i>, referring back to points illustrated in the video. Amplification of the learning points is provided below:</p>	<i>OHT 12</i>

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Preparation</i> – Think about the call and how it might progress. Plan how you will open the call; this puts you in a more considered position, and you will be better able to manage objections or difficulties later. Plan any options you can present and how you might gain agreement together. (As Ken suggests to Barry before he telephones Ana back about the log in problem.) • <i>Gaining control</i> – This is about working constructively towards a positive outcome or, at least, mutual agreement. If you know what you want to achieve, you can use your questioning and listening skills to guide the call constructively. (This was demonstrated by Helen when she controls the call with a tearful Sue.) • <i>Identifying the facts</i> – Listen carefully and filter out the emotion. Identify the facts. (Barry did this when Ana was very angry about the PC not working.) • <i>Acknowledging emotion</i> – Let the person have their say, don't try to interrupt too early. Let the person know you understand how they are feeling – empathise with them. Barry acknowledged Ana's anger by saying how angry he'd feel in the same situation when the PC wasn't working and the new employee was there. • <i>Mirror, pace, lead</i> – Ken talks this through with Liz during the call between Barry and Ana. Mirror the behaviours, then subtly change the pace of your own delivery, lead the person to more productive behaviours and begin to work on finding solutions. 	

Timing 3-hour session	Timing 90-minute session	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Owning the call</i> – Don't hide behind saying something is 'company policy' or similar; this just creates more barriers and dissatisfaction. Be honest and don't promise something you can't deliver. • <i>Stating what you can do, and what you can't</i> – Be positive in saying what you can do rather than what you can't. Where something cannot be done, state this clearly in a neutral tone. • <i>When to apologise</i> – If you have made a mistake, or your caller has been inconvenienced, apologise once and mean it! Barry gave a genuine apology to Ana about his mistake and then moved on to putting it right. • <i>Ending the call on a positive note</i> – Don't be tempted to apologise again. If you've already begun to resolve the situation, referring back to the problem can have a negative effect. 	
01.05		15 minutes	<p>Mirror, pace, lead Point out that in the video, we saw an example of mirroring, pacing and leading (Barry and Ana when Ana is angry about the PC not working), together with some comment from Ken about how these techniques can be used.</p> <p>Ask participants to generate a list of things which can be mirrored, and record these on a sheet of flipchart paper. The list could include points like:</p> <ul style="list-style-type: none"> • Speed of delivery • Length of sentences • Tone of voice 	Flipchart paper

Timing 3-hour session	Timing 90-minute session	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • Type of language used • Voice pitch. <p>Emphasise that mirroring is not about mimicking, it is a subtle behaviour that helps establish rapport; this means that you are 'getting on the same wavelength' as the other person and demonstrating empathy. It is not about manipulating behaviour.</p> <p>Put participants into pairs and say that they are going to practise mirroring. In face-to-face interactions, mirroring often occurs naturally with the participants adopting similar postures and gestures (visual mirroring).</p> <p>Ask each pair to engage in a conversation. One person should initiate this (it can be about any subject, such as a holiday, hobby or interest) and the other person should attempt to mirror their behaviour by asking questions, commenting, and so on. Circulate around the room and look for an example of visual mirroring. Identify this to the whole group and use this as an illustration of the technique.</p> <p>Now get the pairs to continue the exercise, but this time back to back, so that they are only mirroring verbal elements of the conversation.</p> <p>Review in the plenary group, and guide the discussion to include the fact that mirroring often happens naturally when you are face to face with someone. You need to concentrate more when there are no visual clues (when on the telephone). Concentrating on someone's voice alone is much harder: face to face we take in over half the communication visually and this is denied us on the telephone.</p>	

Timing 3-hour session	Timing 90-minute session	Duration	Section and actions	Resources
			<p>Ask for examples of where vocal mirroring was used in the conversations and comment on these. Remember that in this 'role-play' situation, mirroring can often feel forced and unnatural, as both parties are sometimes trying too hard. However, this type of exercise does get people to focus on listening and should make them think consciously about the importance of mirroring in rapport building.</p>	
01.20	0.50	<p>10 minutes in the 3-hour session 5 minutes in the 90-minute session</p>	<p>Skills and behaviours Talk through OHTs 13, 14 and 15 <i>Dealing with difficult calls</i>, to review the skills and behaviours illustrated and bring out how they can be used effectively to handle these call types. Suggestions on how you can expand each learning point using scenes from the video are provided below:</p> <p><i>Distressed callers</i></p> <ul style="list-style-type: none"> • <i>Taking control</i> • <i>Managing emotion</i> • <i>Gathering information</i> • <i>Building confidence.</i> <p>This is what was illustrated when Helen took the call from Sue. Sue was upset about her mistake. Helen took control by asking questions; she understood why Sue was upset (she knew this mistake was out of character for Sue). Helen gathered information about where meetings had been held in the past and used this to suggest options which Sue could consider. Helen also raised Sue's confidence by reassuring her.</p>	OHT 13

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<p>Ask pairs to role-play their call. Role-plays can take place simultaneously to avoid the 'goldfish bowl' effect; the background noise of other role-plays merely replicates the reality of a busy office environment. You should circulate among the pairs and offer support as needed while role-plays are being conducted.</p> <p>When all role-plays have been completed, ask the pairs to discuss the skills used and their effectiveness.</p> <p>Review in the plenary group, using examples from the role-plays to highlight learning points. Look for examples of how participants have used the skills or techniques covered in the video and on OHTs 13,14 and 15 (as above).</p>	
1.50	00.55	5 minutes	<p>Outbound calling</p> <p>Ask participants to identify the situations in which they make outbound calls. These might be 'difficult' calls, as already discussed, or straightforward calls for example:</p> <ul style="list-style-type: none"> • telephoning people or companies for information or advice • calling to place an order with a supplier • calling to introduce your company to potential customers • telephoning to make an appointment with someone. <p>Refer to outbound calls already seen in the video and the points already illustrated. For example, Barry's call to the help desk and to Ana when he tells her about his mistake.</p> <p>Say that you are now going to watch the final section of the video which introduces some of the basic principles of outbound calling.</p>	

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
1.55	01.00	5 minutes	<p>Principles of outbound calling Show the final section of video (starting with Ken and Liz talking about outbound calling through to the end of the video) which focuses specifically on outbound calling.</p>	Video Part 2
02.00	01.05	5 minutes	<p>Outbound calling – learning review Review using <i>OHT 16 Introduction to outbound calling</i>, to highlight key learning points as follows:</p> <p><i>Getting started</i></p> <ul style="list-style-type: none"> • <i>Call opening</i> – Plan your opening, what you need to say and how you want to start the call. • <i>Preparing for the call</i> – Having everything you might need to hand and thinking through how it might progress. • <i>Developing an outbound greeting</i> – Sounding confident and knowing what you want rather than using too many qualifiers like ‘I was wondering if you can help me ...’ which can make you sound unsure of yourself. • <i>Establishing the purpose of the call</i> – Get quickly, but politely, to the point and say what your call is about. (As Sue did when she spoke to the conference manager at the hotel.) <p><i>Getting going</i></p> <ul style="list-style-type: none"> • <i>Explore the current situation</i> – Using questions and listening to answers to find out information or defining the situation. (As Sue did in her call to Chris when she told her about the conference room already being booked.) 	OHT 16

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Define the desired situation</i> – Presenting alternatives, making suggestions or clarifying requirements. • <i>Sell the benefits</i> – As Sue did when she was presenting the benefits of using the hotel and its facilities. <p><i>Getting commitment</i></p> <ul style="list-style-type: none"> • <i>Asking the question – closing</i> – This can be asking for an order or sale, or asking for agreement, as Sue did when she asked Chris if she should book the hotel. • <i>Confirming</i> – Summarising what’s been agreed and what needs to happen next. • <i>Ending on a positive note</i> – Leaving a positive impression. • <i>Follow-up actions</i> – As with any call, it is important to carry out whatever actions you have agreed. 	
02.05	01.10	10 minutes	<p>Call planning Point out that, unlike inbound calls, making outbound calls automatically puts you in more control: you decide when the call will be made and you know what the purpose or required outcome is.</p> <p>Talk through the importance of planning a call. Ask what participants consider to be important points and record these on a sheet of flipchart paper. Compare with the points on OHT 17 <i>Planning an outbound call</i>, and consolidate learning points as follows:</p>	<p>Flipchart OHT 17</p>

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<p><i>Get ready</i></p> <ul style="list-style-type: none"> • <i>Plan the best time to make the call(s) – for you and the recipient –</i> Consider whether the person is likely to be available and ready and willing to take your call. Think about your own situation, for example, if the call might be lengthy, do you have time to attend to it properly? • <i>Know what you want to achieve –</i> Have in mind a clear picture of what you want to achieve in terms of: <ul style="list-style-type: none"> – <i>Ideal outcome –</i> Ideally, what do you want to achieve? This might be an order, or to get some specific information. – <i>Fallback outcome –</i> This is something which will represent a positive outcome from the call, but may not be what you ideally want. It might be a promise to consider your proposition, or finding out the name of a person you need to speak to for information. • <i>Plan your call opening –</i> Decide what you are going to say and how you want it to sound. It should follow the guidelines already discussed. • <i>How might the call go? –</i> Think about what responses you might get and plan how you will respond to these. If the person you want to speak to isn't available, do you want to leave a message or have them call you back? • <i>Prepare for objections or alternatives –</i> If they raise objections to what you are proposing, what alternatives can you offer? Think these through in advance just as Sue did in the video. She got all the information about the hotel <i>before</i> she telephoned Chris. 	

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<ul style="list-style-type: none"> • <i>Plan your call close</i> – Remember that you will want to leave a positive, professional impression. Consider in advance how you might do this. 	
02.15		10 minutes	<p>Call planning practice Ask each participant to plan an outbound call which reflects a call which they would make at work. <i>Handout 6 Planning an outbound call</i>, is provided for them to use as a checklist. Give each participant a copy of the handout and ask them to plan a call.</p> <p>Discuss and resolve any questions, and tell participants that they will now use this planning as a basis for a role-play.</p>	<i>Handout 6</i>
02.25		20 minutes	<p>Outbound calling practice Having planned an outbound call, participants will now practise making an outbound call by role-playing their call with another person. The purpose of having the participants design their own role-plays is to inject some realism into the exercise. You may wish to prepare some role-play briefs if you know the participants' work roles.</p> <p>Put participants into triads – one caller, one recipient and one observer. The caller should brief their recipient on their scenario and then role-play the call. The caller and recipient should sit back to back so that there are no visual cues during the conversation. The observer should note what was done well by the caller and areas in which they could improve. After the role-play, the observer gives their feedback. The caller should also indicate how the call progressed in relation to what they had planned, and any learning they have identified from this.</p>	

Timing <i>3-hour session</i>	Timing <i>90-minute session</i>	Duration	Section and actions	Resources
			<p>The triads rotate through each role, so that all have a turn at practising calling.</p> <p>Role-plays can take place simultaneously to avoid the 'goldfish bowl' effect; the background noise of other role-plays merely replicates the reality of a busy office environment. You should circulate among the triads and offer support as needed while the role-plays are being conducted.</p> <p>When all the role-plays have been completed, ask the triads to elect a spokesperson to present back a summary of how the calls went in the plenary group.</p>	
02.45	01.20	10 minutes in the 3-hour session 5 minutes in the 90-minute session	<p>Learning review and action planning Briefly review the key points covered during the session.</p> <p>Show <i>OHT 12 Managing difficult calls</i>, to briefly recap the key learning points. Show <i>OHT 16 Introduction to outbound calling</i> to recap these points.</p> <p>Invite and respond to any final questions.</p> <p>Ask participants to identify their own personal learning and note this down under the following headings: (write these headings on a sheet of flipchart paper)</p>	<p><i>OHT 12</i></p> <p><i>OHT 16</i></p> <p>Flipchart paper</p>

Timing 3-hour session	Timing 90-minute session	Duration	Section and actions	Resources
			<p><i>My key learning points:</i></p> <p><i>When dealing with difficult calls I will now ...</i></p> <p><i>Next time I have to make an outbound call, I will remember to ...</i></p> <p>If you are running the 90-minute session, briefly ask participants to give their learning points.</p> <p>If you are running the 3-hour session, ask participants to define two points under each heading and write these down. Allow time for participants to consider their personal action plan, and then briefly review in plenary by asking participants to share their learning points with the rest of the group.</p> <p>Distribute Handout 7 Dealing with Difficult Calls, which contains key learning points, and Handout 8 Introduction to outbound calling, for participants to take away.</p>	<p>Paper and pens</p> <p>Handouts 7 and 8</p>
02.55	01.25	5 minutes	<p>Close session</p> <p>Invite and respond to any final comments or questions.</p> <p>Thank participants and close the session.</p>	
03.00	01.30			

Learning objectives

By the end of this training session, you will:

- **Understand and be able to demonstrate the key behaviours required to manage an inbound telephone call effectively.**
- **Be able to identify the stages of an inbound call.**
- **Have practised and demonstrated the core skills required to control an inbound call.**



Positive telephone behaviours

- Focus on the call before you answer it
- Prepare – have systems and paper and pen ready
- Answer the call in three to four rings
- Ignore or remove distractions
- Treat every caller as an individual
- Control the call.



Call structure – The 5 Gs

- **Greeting**
- **Gathering information**
- **Generating options**
- **Gaining agreement**
- **Giving a lasting impression.**



Greeting

- **Key elements**
 - **Welcome** – for example, 'Good morning' or 'Good afternoon'
 - **Introduction** – for example, 'Thank you for calling Hayman-Knight'
 - **Invitation** – for example, 'How can I help you?'

- **Be positive**
 - **Keep focused**
 - **Treat each call as the first call of the day.**



Gathering information

- Listen to the caller's reason for calling
- Summarise your understanding
- Give your name and ask for theirs
- Ask questions effectively
- Listen to the answers
- Ask if there is anything else they would like help with today
- Explore any new requests.



Questioning skills

Open questions

Begin with words like: How? What? Where? When? Why? Who? Which?

Useful for gaining information.

Closed questions

Begin with words like: Is it? Was it? Can? Will? and can be answered with a 'Yes' or 'No' response

Useful for confirming or clarifying information.



Generating options

- Summarise your understanding of the situation
- Provide options for solution
- Involve the caller in the decision making.



Gaining agreement

- **Confirm the decision**
- **Summarise the key steps**
- **Restate what happens next**
- **Give details of any reference numbers or information to be recorded.**



Giving a lasting impression

- **Thank the caller for their business or call**
- **Use a positive voice**
- **End on thank you – not an apology**
- **Allow the other person to end the call first**
- **Carry out actions that you have agreed.**



Leaving a message

- Give your name
- Clearly and concisely explain the purpose of the call
- Leave your number
- Explain what will happen next
- End the message.



Learning objectives

By the end of this training session, you will:

- Have reviewed the behaviours and skills required to deal effectively with inbound calls.
- Understand and be able to demonstrate the basic principles for handling difficult calls.
- Have explored the skills required for managing distressed or angry callers and to deliver bad news.
- Know the stages of an outbound call.
- Be able to demonstrate the skills, actions and behaviours required to make an effective outbound call.



Dealing with difficult calls

Basic principles

- Preparation
- Gaining control
- Identifying the facts
- Acknowledging emotion
- Mirror, pace, lead
- Owning the call
- Stating what you can do, and what you can't
- When to apologise
- Ending the call on a positive note.



Dealing with difficult calls

Distressed callers

- Taking control
- Managing emotion
- Gathering information
- Building confidence.



Dealing with difficult calls

Delivering bad news

- **Honesty**
- **Acknowledging emotion**
- **Selling benefits or alternatives.**



Dealing with difficult calls

Angry callers

- **Managing and diffusing anger**
- **Building trust**
- **Effective control.**



Introduction to outbound calling

Getting started

- Call opening
- Preparing for the call
- Developing an outbound greeting
- Establishing the purpose of the call.

Getting going

- Explore the current situation
- Define the desired situation
- Sell the benefits.

Getting commitment

- Asking the question – closing
- Confirming
- Ending on a positive note
- Follow-up actions.



Planning an outbound call

Get ready

- Plan the best time to make the call(s) – for you and the recipient
- Know what you want to achieve
 - Ideal outcome
 - Fallback outcome
- Plan your call opening
- How might the call go?
- Prepare for objections or alternatives
- Plan your call close.



Leaving a message

Here is a transcript of the message Les left for Phil:

Hi Phil, it's Les Swan. Remember we were talking last week about that trade fair – can't remember if you said it was at Olympia or the NEC – anyway... you were saying that you had a stand there last year ... I'm sure it was you ... I'm thinking of looking into it – could be good for business, but then again... Oh ... anyway, I seem to remember you saying something about a conference organiser company who deals with the stand bookings and gives you all the gen and the prices and everything. Actually, that's what I was ringing about, have you got their number? Could you give me a call back when you've got a minute. Thanks Phil, Bye.

Re-write the message so that it is concise and contains only the information which should be left in a voice message in the box below:



Inbound call role-play framework

This framework is designed to help you construct a role-play scenario which reflects the type of inbound calls you take at work. Your partner will be making the call, so you will need to include the type of information which your callers generally have or want to know. Complete the briefing using the notes below. Add any other relevant information which is relevant to your own work situation.

Purpose of the call:

Is the caller telephoning you for information, advice, to place an order, or similar?

What will they be asking for or telling you about?

Nature of caller:

What sort of people call you – are they professional colleagues, suppliers, customers, members of the public?

Desired outcome:

What outcomes do your callers want from you – information, technical help, confirmation, advice, or other?



Positive telephone behaviours and Call structure

Positive telephone behaviours

- Focus on the call before you answer it
- Prepare – have systems and paper and pen ready
- Answer the call in three to four rings
- Ignore or remove distractions
- Treat every caller as an individual
- Control the call.

Call structure – The 5 Gs

Greeting

Key elements

- Welcome – for example, 'Good morning' or 'Good afternoon'
- Introduction – for example, 'Thank you for calling Hayman-Knight'
- Invitation – for example, 'How can I help you?'
- Be positive
- Keep focused
- Treat each call as the first call of the day.

Gathering information

- Listen to the caller's reason for calling
- Summarise your understanding

- Give your name and ask for theirs
- Ask questions effectively
- Listen to the answers
- Ask if there is anything else they would like help with today
- Explore any new requests.

Generating options

- Summarise your understanding of the situation
- Provide options for solution
- Involve the caller in the decision making.

Gaining agreement

- Confirm the decision
- Summarise the key steps
- Restate what happens next
- Give details of any reference numbers or information to be recorded.

Giving a lasting impression

- Thank the caller for their business or call
- Use a positive voice
- End on thank you – not an apology
- Allow the other person to end the call first
- Carry out actions that you have agreed.



Action plan

Name

Date

Complete this action plan to remind you of what you have learned and how you will implement your learning when you are back at work.

The three most important things I have learned today are:

- 1.
- 2.
- 3.

As a result of this learning:

I will start ...

- 1.
- 2.
- 3.

I will stop ...

- 1.
- 2.
- 3.

I will know that I have achieved this when ...

- 1.
- 2.
- 3.

Share your learning and action plans with your colleagues so that you can encourage each other and celebrate successes.



Difficult call role-play framework

This framework is designed to help you construct a role-play scenario which reflects an example of a difficult call you take or make at work. Either refer back to a difficult call you have had to manage, or imagine a situation which could realistically occur. Your partner will be role-playing the other person in the call, so you will need to include information about their behaviour or the situation which makes things 'difficult'. Complete the briefing using the notes below. Add any other information which is relevant to your own example.

What makes a call difficult:

Is it a difficult situation which you have to deal with, for example when you have to deliver bad news or tell someone you can't do what they wanted?

Is it the difficulty caused by the type of person you have to deal with or their behaviour? If so, what is it about their behaviour or situation which causes the difficulty – are they angry, upset or complaining?

Give a brief outline of what the call is about:

For example, your partner will be calling to complain about a late delivery or you will be calling them to cancel an important meeting.



Planning an outbound call

Use the following checklist to plan an outbound call:	<i>Your notes</i>
Get ready!	
<ul style="list-style-type: none"> • Plan the best time to make the call(s) – for you and the recipient Consider whether the person is likely to be available and happy to take your call. Think about your own situation: for example, if the call might be lengthy, do you have time to attend to it properly? 	
<ul style="list-style-type: none"> • Know what you want to achieve Have in mind a clear picture of what you want to achieve in terms of: <ul style="list-style-type: none"> – Ideal outcome Ideally, what do you want to achieve? This might be an order or to get some specific information. – Fallback outcome This is something which will represent a positive outcome from the call, but may not be what you ideally want. It might be a promise to consider your proposition or finding out the name of a person you need to speak to for information. 	

Continued . . .



Planning an outbound call

<ul style="list-style-type: none">• Plan your call opening Decide what you are going to say and how you want it to sound.	
<ul style="list-style-type: none">• How might the call go? Think about what responses you might get and plan how you will respond to these. If the person you want to speak to isn't available, do you want to leave a message or have them call you back?	
<ul style="list-style-type: none">• Prepare for objections or alternatives If they raise objections to what you are proposing, what alternatives can you offer?	
<ul style="list-style-type: none">• Plan your call close Remember that you will want to leave a positive, professional impression. Consider in advance how you might do this.	



Dealing with difficult calls

Basic principles

- Preparation
- Gaining control
- Acknowledging emotion
- Identifying the facts
- Mirror, pace, lead
- Owning the call
- Stating what you can do, and what you can't
- When to apologise
- Ending the call on a positive note.

Distressed callers

- Taking control
- Managing emotion
- Gathering information
- Building confidence.

Delivering bad news

- Honesty
- Acknowledging emotion
- Selling benefits or alternatives.

Angry callers

- Managing or diffusing anger
- Building trust
- Effective control.



Introduction to outbound calling

Get ready

- Plan the best time to make the call(s) – for you and the recipient
- Know what you want to achieve
 - Ideal outcome
 - Fallback outcome
- Plan your call opening
- How might the call go?
- Prepare for objections or alternatives
- Plan your call close.

Getting started

- Call opening
- Preparing for the call
- Developing an outbound greeting
- Establishing the purpose of the call.

Getting going

- Explore the current situation
- Define the desired situation
- Sell the benefits.

Getting commitment

- Asking the question – closing
- Confirming
- Ending on a positive note
- Follow-up actions



