

## Separating Yourself from the Competition with Telephone Basics ©copyright by Robert (Bob) W. Lucas

One basic strategy for successfully providing effective customer service over the telephone is to thoroughly understand all phone features and use them effectively. This may seem to be a logical and simple concept, but think about times when you called a doctor's office and someone did a poor job in handling the call. For example, they attempted to transfer you, or put you on hold, or did not communicate clearly. If the transfer was successful, you were lucky. If not, you probably could not understand what happened, got disconnected, were connected to the wrong party, or heard the original person come back on the telephone to apologize and say something like, "The call didn't go through. Let me try again." Sound familiar? If so, use the following strategies to ensure that you do not deliver similar poor service.

**Eliminate distractions.** Do not eat food, chew gum, drink, talk to others, read (unless for the purpose of providing the patient with information), or handle other office tasks (filing, stapling, stamping, entering data into a computer or sealing envelopes) while on the phone. Your voice quality will alert the caller to the fact that you are otherwise occupied.

**Answer calls promptly.** A lot is communicated by the way a phone call is handled. One tip for success is to always answer by the third or fourth ring. This sends a nonverbal message to your patients or clients that you are available to serve them. It also reduces the irritating ringing that you, coworkers, or patients have to hear.

**Use titles with names.** It has been said that there is nothing sweeter than hearing one's own name. However, until you are told otherwise, use a person's title (e.g. Mr., Mrs., Ms., or Dr.) and last name. Do not assume that it is all right to use first names. Some people regard the use of their first name as insolent or rude. This may especially be true of older patients and some people from other cultures where respect and use of titles are valued. When you are speaking with clients or patients, it is also a good idea to use their name frequently (do not overdo it, though, or you will sound mechanical). Repeat the name directly after the greeting (e.g., "Yes, Ms. \_\_\_\_\_, how may I help you?"), during the conversation (e.g., "One idea I have, \_\_\_\_\_, is to . . ."), and at the end of the call (e.g., "Thanks for calling, Ms. \_\_\_\_\_. I'll get that information right out to you").

**Ask questions.** Use questions on the telephone to get information or clarify points made by the patient or client. Ask open-ended questions (begin with who, what, when, how, why, or to what extent) then listen to the response carefully. To clarify or verify information, use closed-ended questions (start with a verb like did, could, or would).

**Use equipment properly.** Your success or failure in receiving and delivering messages often hinges on simply holding the receiver or wearing a headset properly. When using the latter, ensure that the earpiece and mouthpiece rest squarely against your ear and in front of your mouth, respectively. This allows you to accurately hear what is said and

accurately transmit your words to the client or customer clearly.

**Use speakerphones with caution.** Speakerphones make sense for people who have certain disabilities and in some environments (where you need free hands or are doing something else while you are on hold or are waiting for a phone to be answered). From a customer service standpoint, these devices can send a cold or impersonal message, and their use should be minimal. Many callers do not like them and even think that speakerphone users are rude. Also, depending on the equipment you have and how far you are from the telephone, the message received by your patient or client could be distorted, or it might seem as though you are in an echo chamber. Before using a speakerphone, ask yourself whether there is a valid reason for not using a headset or handheld phone. When you are using a speakerphone, make sure that your conversation will not be overheard if you are discussing personal, proprietary, or confidential information. Additionally, if someone is listening in on the patient's conversation, make sure that you inform the patient of that fact of that fact and explain who the listener is and why he or she is listening. Some people are very protective of their privacy and their feelings should be respected. You also need to be concerned about compliance with The Health Insurance Portability and Accountability Act of 1996 (HIPPA).

The bottom line to giving effective customer service over the phone is to be prepared for a variety of situations, put on a smile, and know how to use your equipment effectively.

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