

HOW TO TALK TO Customers

CREATE A GREAT IMPRESSION
EVERY TIME WITH
MAGIC®

Diane Berenbaum . Tom Larkin

Chapter 15—Assess Your Calls with MAGIC

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Chapter 15—Assess Your Calls with MAGIC

The telephone call is over. Now your work is just beginning. How do you know if you made a great impression on the caller? Let's find out.

PUTTING IT ALL TOGETHER: WHAT IMPRESSION DO YOU MAKE?

As of this point in the book we have covered all of the MAGIC skills and steps. Now it's time to put them all together into one cogent whole.

Listed below are The 33 Points of MAGIC for incoming calls, the best practice behaviors for each of the five MAGIC steps. These best practices can become the standard of contact quality in your organization, and you can use them to assess your calls and the impression you make on customers.

THE 33 POINTS OF MAGIC—INCOMING CALLS

Make a Connection: Build the Relationship

1. Greeting – Offer welcoming words
2. Greeting – Maintain upbeat tone
3. Greeting – Use unhurried pace
4. Listen and don't interrupt
5. Express empathy through words

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6. Express empathy through tone
7. Use customer's name as soon as you hear it
8. Tell them you will help
9. Ask permission to gain more information

Act Professionally: Express Confidence

10. Express sincerity and helpfulness through tone
11. Maintain appropriate pace
12. Speak clearly with proper volume
13. Use "I," not "we," when appropriate
14. Use "please" and "thank you" to show courtesy
15. Avoid tragic phrases and jargon
16. Use MAGIC phrases to build confidence and trust

Get to the Heart of the Matter: Listen and Ask Questions

17. Ask questions to find the catchpoint (the "what" and the "why")
18. Listen and rephrase appropriately
19. Repeat numbers (four or more) and new contact information
20. Before hold/transfer, explain why and get permission
21. After hold -- use their name...wait for a response...thank them
22. Keep interaction to appropriate length

Inform and Clarify What You Will Do

23. Be proactive: offer options and/or solutions
24. Set a deadline or timeframe before the customer asks
25. Educate with relevant information
26. Be knowledgeable and accurate
27. Summarize the next step(s)
28. Get agreement on the next step(s)

Close With the Relationship in Mind

29. Offer additional assistance when appropriate
30. Use their name
31. End with a MAGIC phrase
32. Close with sincere tone
33. Did you lead the interaction closer to resolution?

Let's go back to where we started: MAGIC – the acronym stands for **M**ake **A** **G**reat **I**mpression on the **C**ustomer. Making a great impression is, after all, the purpose of the 33 Points. And, you can use this list to assess the quality of your customer interactions.

You're probably wondering how your "score" on the 33 Points relates to the impression you make. Our research with clients over the last twenty-five years has shown a connection between the MAGIC assessment and customer perception. Take a look at the table below to see how others might perceive you:

Customer Perception

<u>If you score:</u>	<u>Impression You Make:</u>
1-18	Discouraging
19-22	Indifferent
23-25	Routine
26-28	Very Good
29-33	Exceptional

If your team or organization as a whole embraces and practices MAGIC, you can create a culture that makes you money because customers will continue to buy from you, buy more of the same products from you and potentially buy other products you offer, and refer you to others. We talk more about creating a culture of above-and-beyond service in Chapter Seventeen.

The good news is that you now know the skills needed to make an exceptional impression and create a MAGIC culture. If you make the choice to learn and practice them, you are well on the way to making a consistently professional impression.

We know that 33 Points may seem like a lot of skills to master. But remember that you're probably doing a lot of them already. To set yourself apart and raise the bar, focus on mastering the details. Think of one of your favorite recipes that you make on special occasions – one that requires a lot of ingredients and effort, but it's really worth it. Now, imagine if you cut corners and left out two or three ingredients. Is it likely to taste the same and get your usual rave reviews? Probably not. Consider a musical performance. If the guitarist is a no show, the piece will sound completely different – which may not be a good thing. Clearly, it's the little things that make the difference, whether it's an ingredient in a favorite dish, an instrument in a musical piece, or an element of an interaction.

By focusing on the details of your interactions, you'll start to notice that people will respond differently. And, you may also find that you'll feel better too. With MAGIC, everyone benefits.

A MAGIC MOMENT

Sometimes, a MAGIC Moment can stretch into a marathon, depending on the complexity of the situation. A friend records this shining example:

“I was delighted that my company had just given me a brand new laptop. The computer and I were getting along just fine until I tried to hook up to the Internet at home. I tried everything I knew, then called our help desk provider.

“Luckily, I got Jason. We started talking at about 9 in the morning; our final chat was at about 7:40 that evening. If you’ve ever taken the express to techno hell, this was it!

“Jason walked me through every possibility before arriving at that Eureka moment that unraveled the whole mystery. When I used phrases like ‘wire-thingy’— Jason patiently asked me to describe it for him. When I insisted there was no power source, Jason stayed on the line while I crawled under the desk to sort through a scramble of cords and wires.

“And, when I had to rummage through old documentation that might offer some clues, Jason stayed on the line. He even drove to the office where my old laptop was to see if any helpful information might be there. Nothing was too much time, trouble or effort for me.

“We may have been 77 miles apart, but Jason was right there with me. His patience and humor were matched by his problem-solving skills and ability to translate tech-speak into everyday English.

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“Our marathon left me up and running, perfectly connected. But Jason wasn’t done: he wrote documentation for others in the support team in the event I called in again. And, having mentioned in passing that I would love a screensaver with peacock feathers, he even emailed several terrific pictures for my consideration.

“Talk about exceptional service! I’ll be telling this story for a long time to come. Thank you, thank you, Jason.”

MAGIC—IT'S NOT JUST A CHECKLIST

Despite the 33 Point lineup we just presented, it's important to remember that MAGIC is not a mere checklist. It's a process of interaction that focuses on both relationships and the tasks we all need to accomplish. Instead of thinking, "All I need to do is check off each item on the checklist," recognize that the 33 Points are a set of behaviors that work together to make a great impression on a customer. As behaviors, they are skills that can be learned, developed and eventually mastered so that they become natural, authentic, and automatic.

When you use these skills, you will express respect for the other person and demonstrate professionalism and accountability. So, it is not just about "doing" MAGIC; it is also about "being" MAGIC and bringing these behaviors and mindset to every interaction.

It's also important to note that the 33 Points can be customized to specific environments so that it is aligned with an organization's needs. For example, you may want to emphasize cross-selling or up-selling. These skills can be integrated into the 33 Point form to reflect those goals.

EXPERIMENT WITH MAGIC

Pair up with a colleague or co-worker. Come up with some typically challenging incoming customer calls. Make them interesting and realistic—difficult but not relentless.

Have one person take on the role of the customer; the other, the company representative. Act out the scenario, with the representative using the 33 Points as a guide. See how many of the 33 Points you can use—notice the impact on the “customer” and his responses.

As you debrief, consider the following questions:

- What did you notice overall?
- What impression did the representative convey?
- Did the rep control the call professionally?
- Is the customer closer to a resolution?
- What MAGIC or tragic phrases did you hear?

As you review, focus on specific steps in the overall process, adding ones you may have overlooked and polishing those already in place. To give yourself a different perspective, record your practice. Then play it back and use The 33 Points to assess the interaction.

Once you are done, reverse roles and repeat the exercise with a brand new scenario.

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OUTGOING CALLS

Outgoing calls are somewhat different from incoming; if nothing else, you're the one who's placing the call. That raises several distinct issues that warrant some attention.

Preparing to Make Your Outgoing Call

Before you make an outgoing call, it's important to prepare. Here are some guidelines:

- Gather any information you may need for the call. Have it organized and accessible.
- Bear in mind the other person's communication style and prepare to accommodate it. For instance, some people want to get straight down to business while others prefer to chat a bit. Prepare yourself to match those style preferences.
- Know your questions. List out every question you may need to ask. That way, you can be as efficient and productive as possible.
- Anticipate the other person's questions. Prepare a set of answers for questions you might expect.

Opening Your Outgoing Call

There are specific, effective ways to begin an outgoing call:

- First, identify yourself and the company or organization you represent.

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- Let the other person know upfront about any benefit they may receive as a result of your call. For instance, you may have news or other important information they've been waiting to hear. Push that good news up toward the top of your list.
- Make sure it's a convenient time for the other person to receive the call. All the good news in the world may lose its impact if now's not a good time for the other person to talk. Ask them if it is; if not, find out when it would be more convenient.

Put those elements together and you'd get something like this:

"Hi, Bill, this is Veronica from Smith Associates. I have those projections we've been putting together for you. Is now a good time to review them?"

"Hello, Dawn, this is Brad from Kimball Inc. calling. I'm returning your call regarding the invoices. Is this a convenient time for us to go over those?"

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THE 33 POINTS OF MAGIC—OUTGOING CALLS

As for incoming calls, there are 33 Points of MAGIC for outgoing calls as well. They're listed below and we've italicized the points that are different for outgoing as opposed to incoming calls.

Make a Connection: Build the Relationship

1. Greeting – Offer welcoming words
2. Greeting – Maintain upbeat tone
3. Greeting – Use unhurried pace
4. *Use Customer's name*
5. *Tell customer how s/he will benefit from the call*
6. *Qualify customer's ability to speak*
7. *Give big picture; ask permission to gain more information*
8. *Express empathy through words*
9. *Express empathy through tone*

Act Professionally: Express Confidence

10. Express sincerity and helpfulness through tone
11. Maintain appropriate pace
12. Speak clearly with proper volume
13. Use "I," not "we," when appropriate
14. Use "please" and "thank you" to show courtesy

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15. Avoid tragic phrases and jargon
16. Use MAGIC phrases to build confidence and trust

Get to the Heart of the Matter: Listen and Ask Questions

17. Ask questions to find the catchpoint (the “what” and the “why”)
18. Listen and rephrase appropriately
19. Repeat numbers (4 or more) and new contact information
20. Before hold/transfer – explain why and get permission
21. After hold – Use their name . . . Wait for response . . . Thank them
22. Keep interaction to appropriate length

Inform and Clarify What You Will Do

23. Be proactive: offer options and/or solutions
24. Set a deadline or timeframe before the customer asks
25. Educate with relevant information
26. Be knowledgeable and accurate
27. Summarize the next step(s)
28. Get agreement on the next step(s)

Close With the Relationship in Mind

29. Offer additional assistance when appropriate
30. Use their name
31. End with a MAGIC phrase
32. Close with sincere tone
33. Did you lead the interaction closer to resolution?

EXPERIMENT WITH MAGIC

Practice outgoing calls as you would incoming calls. Work with a colleague and role play an outgoing call. Keep an eye on the 33 Points as you proceed through the call. As you did with incoming calls, pay attention not only to each of the 33 Points but also note the impact the points have on the conversation. When you debrief, ask yourself the same questions with which you concluded your incoming call exercise:

- What did you notice overall?
- What impression did the representative convey?
- Did the rep control the call professionally?
- Is the customer closer to a resolution?
- What MAGIC or tragic phrases did you hear?

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TAKE IT STEP-BY-STEP

Whether you do so through a formal exercise or not, it's always helpful to keep The 33 Points in mind in any conversation. Just think of the five step framework, which provides a logical progression:

Make a Connection: Build the Relationship

Act Professionally: Express Confidence

Get to the Heart of the Matter: Listen and Ask Questions

Inform and Clarify What You Will Do

Close with the Relationship in Mind

To help you achieve a new level of communication and caller satisfaction with each and every call, focus on two or three skills in each step. Then gradually add more as time goes on. Soon you'll find that your interactions have improved and you're using the skills more naturally.

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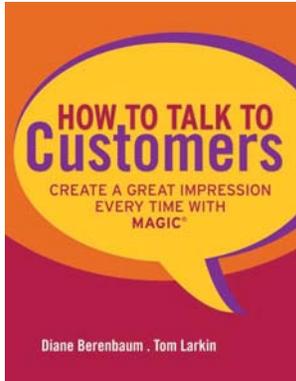
MAGIC MAXIMS

- The 33 Points of MAGIC will help you lead any conversation with professionalism and grace.
- The 33 Points take you step-by-step through each call, emphasizing empathy, connection, and accountability.
- Practice calls using the 33 Points. Review calls after you're done to see the impact these skills can make.
- MAGIC points become MAGIC skills with practice.

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Advance Praise for *How to Talk to Customers*



“How to Talk to Customers presents a system for interacting with customers based on empathy, dignity, and doing the right thing. Use these ideas to turn your customers into raving fans.”

--**Ken Blanchard, coauthor of *The One Minute Manager*[®] and *Customer Mania***

"Talking to customers seems so easy; however, to make a great impression on them, you need the MAGIC System."

--**Norma Diaz, CEO, Community Health Group**

“Warning: This book will radically change corporate cultures and provide businesses with a competitive advantage in customer service. MAGIC smashes superficial, ineffective approaches to solve complex customer service issues through a simple and fun approach. This framework can resolve even the thorniest predicament.”

--**Barry L. Ogle, Vice President Leadership Enrichment Institute, Wyndham Vacation Ownership**

“You have to take care of your co-workers and customers. This book takes common sense approaches and guides you on how to build successful business relationships.”

--**Paul Orfalea, Kinko’s founder and coauthor of *Copy This!***

“How to Talk to Customers illustrates the keys to making MAGIC every day with every contact. If service is a differentiator for your organization, this book should be on everyone’s desk, from the day they start!”

--**William M. Lyons, President and CEO, American Century Companies, Inc.**

“The book that leaders at all levels have been waiting for. It provides a clear and practical tool for assessing customer interaction skills and will help any organization wow their customers with extraordinary service.”

--**Asheesh Advani, CEO, CircleLending**

“Whether you are moving up the ladder or already running your organization, the advice in this book is truly MAGIC and will help you leave a lasting legacy with everyone you meet. Be remembered for the right reasons and make a positive impact with every encounter starting now; it will change your life!”

--**Paige Arnof-Fenn, founder and CEO, Mavens & Moguls**

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“I hope you believe in MAGIC, because this system can really help you build the generous, intimate, personal relationships with customers that will power the growth of your business!”

--Keith Ferrazzi, author, *Never Eat Alone* and CEO of professional development and consulting firm Ferrazzi Greenlight

“If you deal with people, this book is a must-have! The relationships with your 'customers' (clients, co-workers, family and friends) will flourish as you put MAGIC to work.”

--Jason Checketts, Manager of Learning and Development, Wells Fargo

“There's no greater way to help your team build a culture of customer service than by using the MAGIC system. You'll see results immediately...and those results will truly amaze you (and your customers!).”

--Brian Cole Miller, author, *Quick Team-building Activities for Busy Managers*

“MAGIC is one of those simple-but-far-from-easy ideas that can revolutionize a company because it transforms how people think and act. At FreshDirect, we believe in MAGIC and strive to practice it daily.”

--Dean Furbush, CEO, FreshDirect

“Any call center senior executive, manager, supervisor - or anyone who talks to your customers - should read this book then commit to applying its simple principles. Tom and Diane bring to light the fact that all consumers are seeking a unique experience from companies today, and this is it.”

--C. Paul Turner, Managing Director, Training and Performance Improvement, Citifinancial Mortgage, Inc. and Citicorp Trust Bank, fsb

“Any organization interested in creating passionate and loyal customers should read this book. The MAGIC system shows you how to impress even the most discerning customers.”

--Rudy Escalante, CEO, ICOSA Software North America, Inc.

“I Love *How to Talk to Customers!* I want this to be required reading for our employees going forward.”

--Monica Kelly, Quality Analyst, Account Services, Colonial Supplemental Insurance

“One of the most useful manuals for companies and individuals who are serious about exceeding customers' expectations. Follow the 5 MAGIC Steps, understand why words are perceived as tragic and how they can become MAGIC, and MAGIC will become part of your company -- and personal culture.”

--Jansje Stramwasser, Senior Training Manager, Convergys Employee Care

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About the Authors



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Tom has presented at several industry leading conferences and symposiums, including The Gartner Summit, ICCM, The Call Center Exchange, CCNG, and others. Also, he was selected as a moderator for the White House Conference on Small Business for the state of Connecticut.



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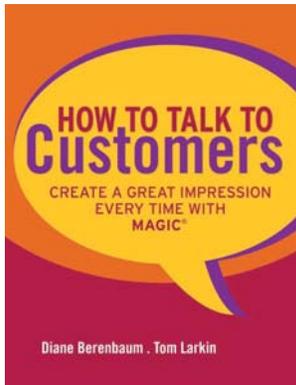
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About the Book



Every once in a while, we as consumers have a truly wonderful experience as a customer of a company. These interactions leave us feeling so positive about our purchase, our relationships with the company, and ourselves that we say, “The experience was magic!” From LL Bean to American Century Investments to Nordstrom there are a select few organizations—some that you have heard of and some that you haven’t—that serve their customers at world-class levels day in and day out.

How to Talk to Customers is the first book on customer service to outline step-by-step how specific world-class companies *Make A Great Impression on the Customer* every time with every customer. Just as important, the book shows how these wonderfully positive instances of customer contact create the key to long-term success: customer and employee loyalty.

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