CUSTOMER SERVICE QUICK REFERENCE GUIDE

In-Person Etiquette

> Remember "No Wrong Door "!

1. Smile - be genuine and make eye contact.
2. Greet them– How can we help?
3. Listen attentively and speak in a friendly & respectful manner.
4. Empathize with a commitment to helping them.
5. Use your empowerment to exceed their expectations to the extent possible.
6. (If appropriate) Thank them for coming in.

> No eating or chewing gum on the phone!

Telephone Etiquette

> Take a deep breath before picking up the call if you need to "reset" yourself.

1. <u>Answer</u> it promptly (within three rings if possible).
2. Smile! The caller can hear the tone of your voice whether it is positive or negative.
3. Identify yourself by announcing your name, the name of your department, and follow with "how may I help you?"
4. Pay attention to the rate of speech, volume, tone and diction. Speak clearly and enunciate your words.
5. Listen carefully & actively. Take notes if necessary.
6. When you're <u>transferring</u> a call (*), inform both the caller and the person you are transferring the call to. Before you put a caller on hold, ask for permission to do so. *Take responsibility for the calls you answer. Don't forward a problem you can resolve yourself to someone else!
7. Use your <u>hold</u> button (instead of covering the mouthpiece with your hand or simply putting the phone down). If the caller may be on hold for a longer period, offer to call back. If the caller prefers to hold, re-service the call every minute or two to let the caller know you are still with the caller.
8. When you get back on the line, thank the caller for waiting.
9. <u>End the conversation</u> with a definite "good bye" or an expression that leaves no doubt that conversation has ended.
10. Let the caller hang up first.
11. If transferring the call, explain the reason why you're transferring the caller to another person (or department) and transfer your customer to the appropriate destination.

Email Etiquette

1. Reply to all emails that are addressed to you
2. Respond in a timely fashion (within 24 hours is optimum)
3. Have a clear subject line (brief, relevant, and specific)
4. Use a professional salutation
   - Informal "Hi" or "Hello" (NOT "Hey," "Yo," or "Hiya")
   - More formal "Dear….(insert name)"
5. Discuss only work-related matters
6. Be polite, organized and professional
   - Make sure to open and close your message with an appropriate and polite greeting while conveying a positive tone. It is always better to be more formal than too casual when you are looking to make a good impression.
7. Keep it simple
   - Be clear, concise and effective
   - Use lists, bullet points, and short sentences to make your message easy to read
8. Make sure to answer <u>all</u> aspects of the email and fully explain your answers
9. Don't use all caps
   - Your email recipient may interpret this in the wrong way. Using all caps causes the email to look unprofessional (& angry)
10. Never "email angry"
    - Don't send an email when you're angry. You never want to say something in a message that you may later regret
11. Be extra careful with confidential and private information
12. Be aware of "reply all"
13. Proofread your message before sending
    - Always look over for spelling, grammar, and punctuation errors
    - Double check TO, CC, (& BCC) and the content
    - Make sure of correct email address
    - Remember to attach correct documents
    - Proof subject line as carefully as you would proof the rest of the email
14. Don't forget your signature
    - Include a signature that shows your name, title, and contact information
15. Use auto-response when necessary
16. Don't hesitate to pick up the phone
    - If you suspect email communication may cause confusion or too many questions, pick up the phone and call