

ULTIMATE GUIDE:

# FIRING UP YOUR TEAM

TO BE

*Phone Rockstars*



yestrak 



An excerpt from  
Own the Phone



## FIRING UP YOUR TEAM

to be

# *Phone Rockstars*

By Spencer Peller

Since 2008, Spencer Peller has been helping business owners drive and convert more phone calls to booked appointments. As the founder of MyDoctorCalls (*a cloud-based call tracking and recording system*) and YesTrak (*a revolutionary live agent answering service*), Spencer has helped thousands of clients generate more revenues as a result of improving the way phones are answered.

Get more information at [www.yestrak.com](http://www.yestrak.com) & [www.mydoctorcalls.com](http://www.mydoctorcalls.com)

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# 1

## *Gimme Shelter:*

### ADMIT YOU NEED HELP

While I truly enjoy working with business owners and entrepreneurs, and am always impressed by how driven they are to succeed, I'm also amazed at how difficult it is for them to recognize the problems that are drastically affecting their bottom-lines. For example, when I ask them point blank about their comfort level with the way staff members answer phones, I generally get one of three responses:

"I think they are doing a pretty good job handling the phones, but I'm not 100% sure."

"I listen when I walk by the front desk and they sound fine to me." 

"My staff has been with me for years and everyone knows them, so there's really nothing I can do about it."

# 1 Gimme Shelter:

ADMIT YOU NEED HELP

[ Continued ]

These responses are tantamount to putting your head in the sand and hoping everything will be ok when you come up for air. Well, that attitude does not work in today's transparent world where everything that occurs within your business is immediately posted on the web!

It's your responsibility to scrutinize everything that occurs on the phones. If your customers are not complaining about something, that doesn't mean everything is hunky dory...

According to Lee Resource Inc, for every customer who bothers to complain, 26 other customers remain silent. So instead of telling you what to fix, customers are just choosing to do business with someone else because of how they feel they were treated on the phones. And you can't afford to lose customers -- NO ONE CAN.



Customer retention has a dramatic impact on your bottom-line. According to Bain and Company, a simple 5% increase in customer retention can increase a company's profitability by as much as 75%!

So the time is NOW to admit you have a problem -- and the time is NOW to do something about it. Turn your team members into Phone Rockstars, and watch your profits soar!



## *Ch-Ch-Ch-Changes!*

### TURN & FACE THE STRANGE

Now that you acknowledge there's a problem with the way your phones are being handled, you need your team to buy into the fact that the problem exists and needs to be fixed. Since most people don't like to admit their faults, this can be challenging for your team members if not handled properly. If you get buy-in the right way, you should experience little push back from your team – and if some individuals do push back, they may not be the best fit for your company.

**To get the quickest and most comprehensive buy-in from your team, you need to present them with concrete data — not hypothetical assumptions — about how phone calls are mishandled.** If you don't present hard evidence, your staff members will feel as though they are being picked on, attacked, or wrongly criticized. That can cause a whole host of other problems. Therefore, you need a system in place to track and analyze calls so you can present your team with concrete data about the state-of-the-nation on the phones.



## 2 Ch-Ch-Ch-Changes:

TURN & FACE THE STRANGE

[ Continued ]

We recommend implementing a call-tracking and call-recording system. There are lots of systems to choose from, and most are easy and inexpensive to implement. In fact, cloud-based systems are available that allow you to track and record phone calls without having to upgrade your phone system or download any software to the computers in your offices.

NOTE: For our readers in the healthcare community, our parent company has a product called My Doctor Calls ([www.MyDoctorCalls.com](http://www.MyDoctorCalls.com)). A turnkey solution for call recording and tracking (so you know which ads are making you money, and which are a waste of budget). As the name implies, it's designed for doctors, but will work with any small business; check it out if you don't have a current solution in place.





[ Continued ]

Once you have a call-tracking and call-recording system in place, you will want to take detailed notes on the outcome of the calls for at least one month, including:

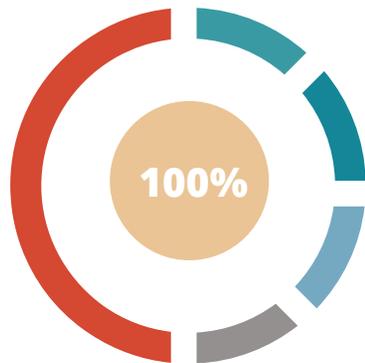
- A)** What type of customer called your business: new, existing, or other?
- B)** Which staff member took the call? Also notate if the call went to a voicemail box.
- C)** What was the outcome of the call: booked appointment, pending sale, lost opportunity, etc.?
- D)** Did the staff member follow your procedures?
- E)** On a scale of 1 to 5, how was the call handled in terms of customer service, with 1 being "Handled Very Poorly" and 5 being "Handled Great"?

## 2 Ch-Ch-Ch-Changes:

TURN & FACE THE STRANGE

[ Continued ]

Once you have each of your calls notated with the prior information, you can compile charts of the results. What type of charts you create is entirely up to you. **One very important number should be included in every chart though: Estimated Lost Revenues.** That number can be calculated by multiplying the amount of calls that did not convert properly times the **Average Lifetime Value of a Customer (LTV).**



With your evidence now assembled and organized in a manner that makes sense for all, you can meet with your team to get their buy-in on the changes you want to implement. Chances are the case you make about the effects poor phone handling will be obvious due to the fact your team will see a sizable dollar amount in the Estimated Lost Revenues column. The rest of the data on the chart will support the comprehensive analysis you performed in order to calculate this amount.

This process is no different than a doctor showing a patient blood work, test results, or x-rays when presenting his or her recommended treatment strategy. People need to see facts clearly on a chart before they agree to a solution you are prescribing. It's just human nature. And that's why you will go through the same exercise to get your team to buy into the plan for change you are about to implement.



## *Don't Stop Believin'.*

### FOCUS ON ATTITUDE

Now that your team has seen the hard evidence and agrees there's a problem that needs fixing, it's time to lay the foundation for everything you will teach them moving forward.

While there are countless strategies that can be implemented to improve phone handling skills, they all hinge on one fundamental belief each team member must have:

**YOUR ATTITUDE DETERMINES YOUR ALTITUDE.**



No matter what you teach your team about building great scripts, overcoming objections, dealing with angry callers, etc., without the right attitude from the outset, your calls are destined for failure. That's why we often refer to the process of handling phone calls as a 'mental game'.



## *Don't Stop Believin'*

FOCUS ON ATTITUDE



[ Continued ]

Before your team members ever take a phone call, their minds have to be in the right place. If their attitudes are off, the deck is stacked against them from the start. You see, it's impossible to overcome a bad attitude with words that are scripted and read, because the way a phone conversation comes across to the caller is much different than the way something reads on a page.

For example, have you ever written something that you thought was so amazing that you went right up to someone and started reading it to them, only to realize as you were reading it aloud that the words weren't coming across the way you thought they would? So, you continued to read, but you probably added more energy, changed the dynamics of your voice, slowed down in certain places and sped up in others, used more inflection, added some of your personality.

What you were doing, in essence, was expressing your attitude about the words to inspire the listener to enjoy them more. If you weren't excited about reading the words in the first place, you would not have adapted the way you read them. That is why attitude is so critical in answering phones! No matter what is scripted for people to say when they answer the phone, unless the words are said with true enthusiasm, the scripts are just words on a page. Answering phones requires passion, sincerity, empathy, and alertness. Without those elements, the calls will be flat.



## Don't Stop Believin'

### FOCUS ON ATTITUDE



[ Continued ]

And guess what? Sometimes it's not easy for everyone on your team to be enthusiastic. There are days when they just don't feel like working. There are days when they just don't feel like talking on the phone. And there are days when they just don't feel like doing much at all! That's human nature. Accept it and learn how to manage it.

That is why this is a mental game, and that is why you need to address your team's mental approach first before you start writing call-handling scripts or directing your team on the best strategies for converting more opportunities to booked business. It's critical that you explain that while they may not be able to control their emotions every day, they can control their attitude. They can say to themselves, *"I recognize that I may not be feeling it today, but I will overcome it with a positive attitude."* That's what winners do.

**"I recognize that I may not be feeling it today but I will overcome it with a positive attitude."**





## *Don't Stop Believin'*

### FOCUS ON ATTITUDE



[ Continued ]

There are many stories you can share with your team to provide them with examples of people who have stepped up against all odds when their team needed them most. For basketball fans, two great examples come to mind. There was the “Flu Game” in the 1997 NBA Finals when Michael Jordan went out on the floor with a high fever and scored 37 points to lead the Bulls to victory. Or how about the 1970 NBA Finals Game 7 when Willis Reed had a leg injury and was barely able to walk but hobbled onto the court before the start of game and scored the game’s first two baskets to inspire the Knicks to victory.

If you are not a hoops fan, I’m sure you can find countless heroic stories about people doing amazing things on days they weren’t expected to be amazing, and how attitude is what made the difference in the final result.

However you want to get the point across to your team, you need to do so, and do so often. Your staff needs to understand that each member is a pivotal part of the team, and when they answer phones with the wrong attitude, it affects everyone.



# 3 *Don't Stop Believin'*

FOCUS ON ATTITUDE

[ Continued ]

Your competitors probably aren't thinking about attitude and phone calls and their link to customer service, so you can quickly differentiate yourself in the market by implementing the procedures and strategies that show you're different. So, that's your edge. That's your difference maker. That's your unique selling proposition.

Having a good attitude about customer service is contagious. When a few members of the team have the correct attitude, it will spread across your entire organization. However, that principle can be applied to bad attitudes as well. If one or two members of the team have bad attitudes, negativity, like sickness, spreads even faster. As a leader in your business, your job is to remove the sickness as quickly as possible before it spreads. Your bottom line cannot afford to have an unhealthy organization.

**"Absolutely, I would be happy to help with that!"**





# 4

## *More Than a Feeling.*

### PUT IT IN WRITING

Every organization needs an Employee Handbook—however, most of the time, the handbook leaves out details on how the phones are supposed to be handled. That’s a big, big mistake -- and that’s why you need a **Phone Call Code of Conduct Manual**.

While establishing a Phone Call Code of Conduct Manual for your business may seem like a long and arduous task full of “if this, then that” scenarios, I assure you it will do wonders for your bottom-line. Not only will it be pivotal in the retraining your current team members, but it will also greatly benefit your future new hires as they enter your organization.

# 4 *More Than a Feeling.*

PUT IT IN WRITING

[ Continued ]

Your **PHONE CALL CODE OF CONDUCT MANUAL** should include *(but not be limited to)*:

- The greeting you want used on all calls
- How to put callers on hold
- How to transfer callers
- How to take messages
- Steps for solving problems
- Scripted answers for the Top 10 Questions asked by callers
- Your 30-second Elevator Pitch  
*(The key benefit you offer your customers that can be said in 30 seconds or less)*
- How to close out calls
- How to follow-up with callers

**NOTE:** If you want to cut and paste your way to a **Phone Call Code of Conduct Manual**, my book *'Own the Phone'* has everything you need!

This manual can be in whatever format you want, so get creative. The main thing you want to accomplish here is for your team to know that you have a plan, and blueprint for treating callers -- to be followed at all times.





# 5 *Imagine:*

## DEVELOP A TRAINING SCHEDULE

Ongoing training and development is a necessity for any successful organization -- so set the schedule now and stick to it. Resist the urge at all costs to postpone or cancel training sessions. Doing so sends the wrong message to your team about your level of commitment to delivering excellent phone-based service. Be diligent about your training, and your team will come prepared and ready-to-go for each session.

**Hold two types of meetings with your staff members who answer phones: individual (one-on-one) meetings and team (group) meetings.** These meetings should be held regularly (ideally once a week) and should continue on that schedule for as long as it takes to achieve your goals (Note: Goal setting is covered next).

After achieving your goals, continue to hold the meetings on a regular basis, but you may want to move them to bi-monthly or monthly if they are becoming redundant and your team is losing interest.



[ Continued ]

**Individual or 'one-on-one' sessions:** These sessions should be 30 minutes to one hour each to allow staff members to confidentially discuss issues they are having. This also provides an opportunity to perform individual coaching without singling out a team member in front of the group. Call-tracking and recording will be helpful during these one-on-one meetings since you can use the recordings to help introduce “problem areas” and illustrate issues.

**Group or 'team' sessions:** These meetings should never be more than 30 minutes long, as your team will begin to revolt if they drag on too long on a regular basis. These sessions are really more about generating enthusiasm and talking about teamwork versus breaking down individual call recordings -- although some role-play exercises can certainly come in handy here.

The goal of the team meetings is to get everyone on the same page about the progress you have made and the upcoming steps required to meet your goals. It's important that your staff members feel like a team, the power of many is much stronger than the power of one. Make your team meetings as interesting and unique as possible. Play movie clips, tell stories, have guest speakers, engage in role-play, take quizzes, hold contests, serve food—whatever it takes to get them excited about being a member of your team and excited about hitting the team goals you have put in place.





# *Don't Fear the Reaper*

## SET REALISTIC GOALS

It's critical that you set short- and long-term goals in order to measure the progress of each of your team members and the team itself. Breaking bad habits and forming new ones involves hitting milestones: events that garner special attention.

**Milestones are critical because they provide your team with the motivation they need to accomplish each step of the transformation process.** So in the same way marathon runners set goals for each mile marker of the 26-mile race, knowing that each milestone achieved brings them one step closer to the finish line, you will need to set similar goals, or milestones, for your team members in their race to improve their call handling.





## *Don't Fear the Reaper:*

### SET REALISTIC GOALS



[ Continued ]

These milestones can signify whatever you choose. For example, your first milestone may be to have each of your team members handle a tough call and follow your procedures properly to convert the caller. Maybe the next milestone is that each member achieves an average of at least a 4-star rating for one full week. The next milestone may be a team milestone: the team maintains at least a 4-star rating for one full week. You get the idea.

It's up to you to set milestones according to what motivates your individual team members. Tailoring your milestones to individual team members is critical in the development process, so you will really want to analyze your team members in advance of laying out the milestones and think this through before making any final decisions about goals.

The most important thing to remember is that you want your team members to achieve their goals or milestones, so setting goals that are unattainable will have a negative effect on the overall performance of the individuals and the entire team.





# 6 Don't Fear the Reaper:

## SET REALISTIC GOALS

[ Continued ]

**I have seen this mistake time and time again.** Leaders of organizations set lofty goals for their team members that are impractical and impulsive (and probably impossible to hit), thinking to themselves that as long as the team hits 50% of the target, they will be judged as an effective leader. **In the end, the team hits about 25% of the target, and the initiative—and the leader—look like complete failures.**

Why does this happen? The answer is simple: when goals are too lofty and team members can't achieve them, they get discouraged. When someone is discouraged, it causes a significant amount of internal stress that holds them back instead of moving them forward. Therefore, failure to hit goals actually hurts their normal performance levels rather than motivating them to achieve.

On the contrary, success makes you feel good about yourself and what you can achieve— thus the phrase, “success breeds success.” When you know you can accomplish what you set out to accomplish, that drives you to want to accomplish more! And more important, you know that you CAN accomplish more. Furthermore, when team members see colleagues achieving success by hitting their targets, it motivates them to join the group that’s having all of the fun! And the only way to do that is to hit their targets as well. The net result is that everyone wins when people achieve their goals.

# 6 *Don't Fear the Reaper:*

SET REALISTIC GOALS

[ Continued ]

A good way to gauge whether your goals are realistic is to actually involve your team members in the goal-setting process. Do that by having an open dialogue with them about what they think they can accomplish and how long they think it will take to accomplish it. By getting your team involved in the goal-setting process you are actually getting them to buy into the goals. When your team believes they can hit the milestones, chances are they will actually hit them—and probably blow past them, which is exactly what you want.

A great strategy to help ensure your team buys into the established goals/milestones is to ask each to sign a document attesting to their belief that they can hit the milestones. They can post this signed document above the phones so they are reminded about what they committed to achieve. This is a great way to constantly remind your team about what they are devoting themselves to and what the organization is looking to achieve in the long run.





## *Don't Fear the Reaper:*

### SET REALISTIC GOALS

[ Continued ]

When your team starts hitting goals or milestones, celebrate!  
Make a big deal out of it! After all, they're becoming Phone Rockstars!

Announce the milestones that were achieved, hand out certificates or awards when they are hit, give the successful staff members a bonus, a gift, an extended lunch break—whatever you think will excite them the most and get others to want to achieve their milestones. That positive energy will spread throughout the team and go a long way in achieving your overall goals as an organization.



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**FIRING UP YOUR TEAM**

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