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# Simple Steps to Delight Your Callers (and Close More Business)



An excerpt from  
*Own the Phone*





## 3 SIMPLE STEPS TO DELIGHT YOUR CALLERS (and probably close more business)

By Spencer Peller

Since 2008, Spencer Peller has been helping healthcare practices 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)



# INTRODUCTION

The phone is the lifeblood of your business.

According to eConsultancy, 61% of your customers still prefer to receive their assistance via the phone (*versus email, live chat and automation*). With your success literally riding on each and every call, what can you do to improve the way your customers are handled when they take the action to contact you?

Improving phone handling doesn't happen overnight -- but it's well within your reach in three simple steps, with a few everyday office items:

- 1) Make a firm commitment to improve, as an individual, and collectively.
- 2) Give yourself time to let the following tips become second nature.
- 3) Use these every day items to help prop up your efforts



# ① MIRROR:

No, it's not just to remind you of how unbelievably good looking you are. Your energy level is the most important component of a successful customer interaction. Think about it: would you rather speak to a company that's excited you called, or a receptionist that can't be bothered who sounds like Eeyore (*no offense to Pooh*)? If you can maintain positive energy throughout a call, conversion rates (the percentage of times prospective buyers sign up with you) will increase. Positive energy starts with a smile. When you are smiling, everything you say immediately seems sunnier (*go ahead, try it now*).

People on the other end of the phone line won't be able to see your smile, but they'll hear a sparkle in your voice that says volumes. The easiest way to make sure you're smiling on a call? That's right...that little mirror you're going to put right next to your phone. Aside from the fact that your hair will look marvelous with all your primping, it'll remind you to show those pearly whites every time there's a rings-ding-ding.



**BONUS TIP:** if you can, stand when you speak instead of sitting. This may not be feasible in your office, but if it is, it's amazing how easy you'll find it is to smile when your whole body is in motion. Plus, your diaphragm will be expanded, your voice will sound richer...all good things. Your posture is a direct reflection (pun intended) on your attitude; give it a try.

## ② BRIGHT-COLORED CLIPBOARD:

If you're part of a phone answering team, this is really effective.

The concept is simple: if the phone rings, and a new customer is on the line, pick up the brightly colored clipboard. This does two things to help:



The color (*or pattern, flag, sticker; whatever makes it stand out*) of the clipboard lets your co-workers know you engaged with a new prospect, and shouldn't be interrupted. All of your marketing dollars go towards driving new business. If you want to maximize your ROI, you need to treat first-time callers with your Grade A service standard. The colored clipboard is an easy visual cue to others that you are engaged in new customer conversion, and they may have to help pick up the slack with in-office clients or other calls.

Pre-load this clipboard with new client intake forms, or whatever is appropriate for your customer on boarding process. Filling out one of these forms as you start talking to a client allows you to manage the callers expectations and deliver a clean, logical flow to a call -- something that will make your business stand out in a competitive environment.

# 3 CHEAT SHEETS:

**Don't worry; I won't tell the teacher.**

Cheat sheets are a great way to remind you of the internal process your company has for handling different types of calls. New callers, existing business, customer service issues...there are many types of inbound calls, and you should have a general system for dealing with each (*if you don't, give it some thought, or reach out to us for help in that area*). Once you're clear on your process, make a cheat sheet for each, keeping three simple steps in mind:

- 1) Use as few words as possible; it's not a script, just some visuals to jog your memory.
- 2) Place your cheat sheets (*or checklists, post-it notes, stickers; whatever works for you*) someplace easy to view. Perhaps you can tape one along the side of your mirror for new callers, or next to your computer screen for existing callers or customer service issues. Wherever they go, make sure they're easy to access; body position has a critical role in your phone voice, so don't hide them under the desk, or you risk sounding constrained while you try to find them.
- 3) If you're using cheat sheets in an office where you have visitors, remember that may be in full view to your clients. There's nothing wrong with this (*they may even appreciate your professionalism*), just make sure you keep them nice and tidy, free of doodles or anything distracting.



# CONCLUSION

That's it -- Three tips, and three tools.

Put them in to practice today, and watch your customer satisfaction rates soar.

