



PARTICIPANT HANDBOOK



Tourism & Hospitality

Language:
English

CUSTOMER CARE EXECUTIVE

Customer Care Executive



Orion House, 28, Chinar Park, Rajarhat Road
Kolkata – 700157, Ph.: +91 33 40051635

www.orionedutech.com

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Chapter - 1

The Role and Importance of a Customer Care Executive



A CCE needs to understand the role and importance of a CCE to make sure clients do not experience any form of inconvenience and their concerns are being attended promptly.

A customer care executive is one who essentially belongs to an organisation or service center and works as a bridging force between the customer and the organisation. He/she tries to meet the needs of the customer within the ambit of the management.

Profile could be Outbound or Inbound Customer service - Execution of the customer complaints recording & responding to enquires and follow up actions, these could be the basic role in any call center.

By his/her work the organisation should get pleased because the customer is happy and the customer becomes happy when his queries or organisation delivering the goods/service.

Key roles of a CCE commonly, public relates to their job description as an operator. What really happens in a call center is actually more than that.



A CCE's role usually involves:

- Answering incoming customer call: A call center uses varieties of media to communicate with customers.

“WHO ARE YOU TALKING TO?”



CUSTOMER SERVICE AND IT'S AWESOME!

Most common media are phone calls, emails, chatroom, fax and the latest is via short messaging system (SMS). These methods are used by customers to seek help from customer service desk.

So in order to be an effective and active agent, one must be able to handle the latest technologies provided by the employers.

- Taking complaints and questions: Each customer that contacted the service center will have their own complaints or queries. Each complaints and queries must be answered in an orderly manner, regarding to the company's standard.

This matter requires agents to have appropriate listening skills, questioning skills and empathy skills.





- Gather relevant information relating to the customer's concern: As another function of call center is to provide a quality customer experience, most probably a satisfied customer will return for another service. Therefore, it is important for the agents to keep records of the customers so that they will not have to give it again next time.

The relevant information that gathered will be used by the company for documentations and sharing with other companies.

All of the processes above are done using the agreed procedures set up by the companies. The agents will try to attempt to resolve any query or concern of the customers in just a single phone call. Customer service executives are the ones responsible in making sure that their clients are not experiencing any form of inconvenience and their concerns are being attended promptly.

In short, a Call Center Executive's Job Duties are:



- ✓ Determines requirements by working with customers.
- ✓ Answers inquiries by clarifying desired information; researching, locating, and providing information.
- ✓ Typical response time by CCE needs to be with 30 seconds.
- ✓ Adheres to time be it calls, lunch, breaks, training, etc. or number of days to be spent at office (Sick Leave-12 Days,

Casual Leave-12 Days, Privileged leave-18 Days). Log in time usually is 8 hours with 1 hour of breaks (30 Mins – Meal Break, 15 Mins Coffee Break, 15 Mins. Coffee Break)

- ✓ Fulfills requests by clarifying desired information; completing transactions; forwarding requests.
- ✓ Sells additional services by recognizing opportunities to up-sell accounts; explaining new features.
- ✓ Maintains call center database by entering information.
- ✓ Keeps equipment operational by following established procedures; reporting malfunctions.
- ✓ Updates job knowledge by participating in educational opportunities.
- ✓ Enhances organization reputation by accepting ownership for accomplishing new and different requests; exploring opportunities to add value to job accomplishments.



- ✓ Achieves minimum typing speed and accuracy as specified for the job role.
- ✓ Categorizes customer's interaction as a query, request or a complaint.
- ✓ Reassures customers of service promises made by the organization.

- ✓ Provides additional information to customers in response to their questions and comments about the service.
- ✓ Reviews his/her call login time, number of dials, customer contacts, attendance for the review period with the help of the CRM.



A CCE understands the role and importance of a CCE and avoids clients from experiencing any form of inconvenience. CCE knows how to resolve problems by clarifying issues and attends to the customer's concerns promptly.

Exercises:

A. Answer the following questions:

1. What are the roles and responsibilities of a Customer Care Executive?
2. Who is a customer care executive? If you get a job of a CCE in a BPO what all duties you will have to perform?

B. Choose the correct answer:

1. The agents will try to resolve any query of a customer in just a single call. (True/ False)
2. The agent may not need to categorize customer's interaction as a query, request or a complaint. (True/ False)
3. The latest mode of communication is fax. (True/ False)

Chapter - 2

Code of Ethics



To educate CCEs about how to and how not to behave in an organization and to follow the code of ethics to have a better relationship with customers.

It is believed a community should be truly open for everyone. The commitment is to provide a friendly, safe and welcoming environment for all, regardless of gender, sexual orientation, disability, ethnicity, or religion.

This code of conduct outlines the expectations of a CCE's behavior, as well as the consequences for unacceptable behavior.



Expected behavior

- ✓ Be considerate, respectful, and collaborative.
- ✓ Refrain from demeaning, discriminatory or harassing behavior and speech.
- ✓ Be mindful of your surroundings and of your fellow colleagues.

Unacceptable behavior



Customer Care Executive

- ✓ Unacceptable behaviors include: intimidating, harassing, abusive, discriminatory, derogatory, or demeaning conduct by any CCE
- ✓ Harassment includes: offensive verbal comments related to gender, sexual orientation, race, religion, disability; inappropriate use of nudity and/or sexual images in public spaces (including presentation slides); deliberate intimidation, stalking or following; harassing photography or recording; sustained disruption of talks or other events; inappropriate physical contact, and unwelcome sexual attention
- ✓ Wearing clothing that is not suitable for a professional work environment, that is provocative, or otherwise potentially offensive



- ✓ Physical or verbal abuse, intimidation, threats, annoyance, harassment, stalking, pushing, shoving or use of any physical force whatsoever against any person, which in any way creates a disturbance that is disruptive or dangerous, or creates apprehension in a person
- ✓ Possession of any item that can be used as a weapon, which may cause danger to others if used in a certain manner
- ✓ Any boisterous, lewd or offensive behavior or language, using sexually explicit or offensive language or conduct, profanity, obscene gestures, or racial, religious or ethnic slurs
- ✓ Possessing any open can, bottle or other receptacle containing any

alcoholic beverages

- ✓ Possessing any illegal substance, including but not limited to narcotics, marijuana, or other illegal drugs
- ✓ Smoking – other than in designated areas
- ✓ Assembling for the purpose of, or resulting in, disturbing the peace, or committing any unlawful act or engaging in any offensive behavior
- ✓ Failure to obey any rules or regulations



Ethics

Code of Conduct is underpinned by 3 foundations which relate to honesty, integrity and professionalism.

Honesty:

All offers / services must be stated clearly and honestly to ensure that the parties know exactly what they have committed to and what should be received in return. All claims, which are untrue, misleading, deceptive, fraudulent or unjustly disparaging of competitors, are deemed to be unprofessional, dishonest and are considered to be in breach of this code.



Customer Care Executive

Integrity:

Call centre professionals who abide by this code will endeavour to create an environment in their workplace which promotes enthusiasm, confidence and a desire to achieve key objectives by all employees.

Professionalism:

In order to effectively promote both the organisation and the industry, it is expected that all activities will be conducted in a professional and ethical manner.

Relationships with consumers

1. During calls, a CCE should immediately state their name, the company on behalf of whom they are calling, and inform the consumer for the purpose of their call. They should also describe clearly the offer for a product/service, be polite, respect the consumer's existence and personality and end politely the call if the consumers ask them to do so.

2. Outgoing calls should not be made at improper hours, except with the express prior consent of the consumer. It is not advisable to make calls before 08:00 and after 21:00 during working days, before 10:00 and after 20:00 on Saturdays. No calls are made on Sundays and holidays.



3. While answering incoming calls, all necessary measures should be taken in order to minimize the waiting time that in any event should not exceed an average of 60 seconds per day and 5 minutes maximum. In any case, companies should always try to reduce waiting time by using alternative information systems (self-service systems, Interactive Voice Response, etc.).

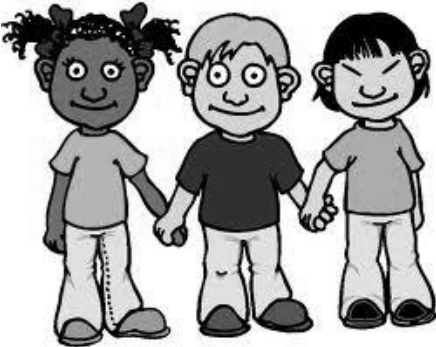
4. The use of auto dial equipment and pre-recorded message transmission is allowed as long as they offer the technical possibility to release the consumer's line in case he/she decides to end the call before, during or even after the pre-recorded message transmission.

5. The use of Interactive Voice Response (IVR) technology should also allow the consumer to talk with the CCE.



6. Telephone conversations can be monitored or/and recorded only for educational purposes, in order to register and afterwards confirm what was said, for quality control reasons, and in order to confirm sensitive or/and financial transactions (e.g. Telephone Banking, verbal order to charge a credit card, etc.).

In any case, recordings should not be publicly transmitted without prior notification of the parties. Moreover, recording should be, in any case, in conformity with the current laws of the country.



7. When the CCE judges that the consumer with whom he/she is talking to is underage or a person with special needs, he/she should ask to speak with the parent or guardian. If that is not the case, he/she should end the call.

8. The call should be done in order to fully inform the consumer but with respect to the value of his/her time. Upon consumer's request, the call is interrupted and scheduled at a time of his/her choice.

9. It is not recommended to repeat a call to the same consumer within a time limit for the promotion of an offer of the same customer for the same product or service and under the same conditions by the same member.

10. CCE will call customers attention to the proper observance of their duties as being product and service providers within the framework of consumer's protection and specifically of the disposition regulating distance sales.

11. For the best rentability of the project, CCEs will use databases that the company has legally collected and processed.

12. In case of using customers' personal database, the company has to control the legal collection and storage of their data.



13. CCEs should conform strictly to the current regulatory framework of personal data protection.

14. If a consumer who is the subject of the personal data asks it, CCEs should inform him/her about the origin of the database where his/her data are included.

15. CCEs should take appropriate organizational and technical measures for securing personal data and protecting them by accidental or unlawful destruction, accidental loss, alteration, prohibited transfer and all kinds of unlawful processing.

16. CCEs should take proper measures in order to prevent unauthorized reading, copying, alternation or erasure of personal data records. In order to ensure these conditions, companies should protect materials or electromagnetic carriers of personal data records to a secure area and set up strict terms of use and operation only by authorized persons as well as produce backup copies.

17. Companies should apply all appropriate measures in order to prevent unauthorized transfer of personal data. For this matter, they should ensure personalized use of personal computers connected to each CCEs' system, by setting up user identification methods, the use of access codes, an automatic disconnection in case of unsuccessful tries, etc.

18. CCEs is equipped with the necessary software in order to determine with accuracy the origin as well as the destination of personal data transferred within their responsibility area. During personal data records transfer by CCEs to companies, each CCE should ensure the protection against unlawful processing, by setting up deciphering and transfer monitoring methods.

19. Personal databases transferred by customers to CCEs are the company's asset and are not used for other purposes.

20. No calls to customer's telephone numbers are allowed.



CCEs knows how to and how not to behave in an organization and to follow the code of ethics to have a better relationship with customers.

Exercises:

A. Answer the following questions:

1. What is code of conduct? What is an expected behaviour?
2. What is an unacceptable behaviour?
3. What are the 3 foundations of code of conduct?
4. Explain the code of conduct related to relationship with customers.

B. Choose the correct answer:

1. The expected behavior from a CCE is to refrain from demeaning, discriminatory or harassing behavior and speech (True/ False)
2. Wearing clothing that is suitable for a professional work environment should be _____.
 - a. Informal
 - b. Formal
 - c. Semi Formal
 - d. Casual

3. Code of Conduct is underpinned by 3 foundations which relate to honesty, integrity and _____.
 - a. Professionalism
 - b. Harassment
 - c. Relationship
 - d. Conversation
4. Outgoing calls should not be made at improper hours, except with the express prior consent of the consumer. (True/ False)
5. The full form of IVR is Interactive Vocal Response. (True/ false)
6. It is not a priority for companies to apply all appropriate measures in order to prevent unauthorized transfer of personal data (True/False)

C. Grooming check of every CCE

D. Role play

Chapter - 3

Confidentiality



To understand customer confidentiality and abiding by the privacy law

Customer confidentiality is the principle that an institution or individual should not reveal information about their clients to a third party without the consent of the client or a clear legal reason. This concept is commonly provided for in law in most countries. Customer privacy laws and regulations seek to protect any individual from loss of privacy due to failures or limitations of corporate customer privacy measures.

It is important to maintain confidentiality because a breach of confidentiality can be very upsetting. It can weaken the trust between a professional and a client.



Sample:

Sample Data Protection Clauses

4. Data Protection Clauses

4.1 Any information and data provided by to the Company and used by the Company directly or indirectly in the performance of this Agreement shall remain at all times the property of the ... It shall be identified, clearly marked and recorded as such by the Company on all media and in all documentation.

4.2 The Company shall take all reasonable precautions to preserve the integrity and prevent any corruption or loss, damage or destruction of the data and information.

4.3 In the event of termination of this Agreement the Company shall when directed to do so by, and instruct all its agents and sub contractors to, erase all information and data provided byand all copies of any part of the information and data provided by from the Company's systems and magnetic data.

4.4 The Company agrees to comply and have adequate measures in place to ensure that its staff comply at all times with the provisions and obligations contained in(as amended from time to time):

The Data Protection Act 1998

The Telecommunications (Data Protection and Privacy) (Direct Marketing)

Regulations 1998

The Consumer Protection Distance Selling Regulations 2000

4.5 All personal data acquired by Company from shall only be used for the purposes of this Agreement and shall not be further processed or disclosed without the consent of

Customer Care Executive

4.6 Nothing in this Agreement shall oblige to disclose any information to the Company if it is of the view that to do so would be a breach of the Data Protection Act 1998

4.7 The Company shall indemnify for any breach of the legislation in clause above which renders liable for any costs, fines, claims or expenses howsoever arising.

4.8 In fulfilment of its obligations under Clause 4.4 the Company will have in place and will maintain at all times the

Information Standards which will deal comprehensively with:

4.9 The protection of the confidentiality, integrity and security of all and any information supplied to the Company by...

4.10 The audit and accounting procedures in place to deal with the requirements of this clause;

4.10 A The reliability and training of staff to ensure awareness of (and compliance with) their obligations under clause

4.10 B Any other measures and procedures to ensure that the Company's obligations under the clause 4 are met.



Summary

CCE understands the laws around customer confidentiality and privacy which helps him/her avoid any breaches.

Exercises:

A. Answer the following questions:

1. What is customer confidentiality?
2. What are the sample data protection clauses?

B. Choose the correct alternative:

1. Customer confidentiality is the principle that a _____ should not reveal information about their clients.
 - a) Customer
 - b) Housekeeping person
 - c) Employee
2. A breach of confidentiality does not weaken the trust between a professional and a client (True/False)

Chapter - 4

Time Management Concept



To understand how to manage time in this competitive world in order to stay ahead



Getting Started With Time Management

Time management refers to managing the amount of time you spend in a day doing things that need to get done. Good time management skills mean that you get everything done that was intended to get done that day, for example, getting up on time, eating a healthy breakfast, going to class or work (or both!), going home and doing homework (or actual work at home from your job), and getting to sleep at a decent hour so you can wake up at your usual time the next day.

Time management is really about managing yourself. It's about making a commitment to be more organized, maintain your focus and use your time to your best advantage.

The three most important tools for good time management are Attendance, Discipline & Punctuality.

Here are some tips to help you become active and proactive with your time:

- Stick to the plan

When you plan, make sure you follow it through and through.



- Maintain a to-do list

Create a to-do list and make it a habit to continually update it. Include urgent and non-urgent items so you'll never forget or overlook anything again. Carry your list with you at all times. Also, be sure to break down your projects and assignments into specific action points.



➤ Allocate your time

Include an estimated time frame for each action point and the date by which the task must be completed. If the order in which you perform the tasks doesn't matter, you might be able to accomplish something during unexpected pockets of free time. For instance, you could research information on the internet while waiting in your office for a conference call to begin.



➤ Set and respect deadlines



Be realistic about setting deadlines and strive to meet them. It's true that any task takes the exact amount of time allotted to it. Have you ever noticed how quickly you can blitz through paperwork, delegate assignments and make decisions on the last day before your vacation? Although we tend to get a lot done when we're under pressure, it is a lot less stressful and considerably more professional to establish and stick to an action plan.

➤ Avoid wasting time

Common Things That Waste Time: In order for you to excel at time management, it is important for you to be able to identify things which waste time.

The first thing that will waste your time is called poor planning. Poor planning is something that will not only waste your time, but could severely impact your ability to achieve a desired goal.

Another problem that people have is trying to do too much at once. Attempting to do more than what you can handle can lead to stress, burn out, and a number of other problems.

While delegating is important when you are working in a group, it can become a waste of time if it is not done effectively.

Another killer of time management is disorganization. When people are not organized, they are prone to failing to meet deadlines, or they will forget to finish a task.



ACHT/ AHT

Average call handling time or Average handling time is the average duration of one transaction, typically measured from the customer's initiation of the call and including any hold time, talk time and related tasks that follow the transaction.

CCE needs to balance total number of minutes spent talking to the customer, within specified limits. This would include wrapping up calls, notations, tagging etc.

The CCE also needs to provide estimate of resolution time to the customer, if an immediate solution cannot be found on-call

AHT depends on the process a CCE works in.

Eg. AHT for inbound technical process can be 30 Mins-45 Mins

AHT for inbound telecom process can be 5 Mins-7 Mins

AHT for outbound telemarketing can be 10 Mins-13 Mins



Summary

By following a few simple steps, CCE knows how to manage time and move ahead of others

Exercises:

A. Answer the following questions:

1. Why do we need to manage time?
2. What are the 3 most important tools in time management?
3. Are you able to manage time in your daily life? How do you do so?
4. What is AHT? What does AHT depend on?
5. How does a CCE reduce AHT?

B. Choose the correct answer:

1. The three most important tools for good time management are _____, discipline & punctuality.
 - a) Planning
 - b) Health
 - c) Commitment
 - d) Attendance
2. A to do list helps in ranking tasks according to importance or urgency (True/False)
3. The first thing that will waste your time is called poor _____.
 - a) Planning
 - b) Organizing
 - c) Deciding
 - d) Building

C. Make a 'To do' list according to your plans for the next day.

Chapter - 5

Desirable and Undesirable Communication



To know telephone etiquette and courtesy while conversing with customers over the phone



Telephonic etiquette refers to a set of rules that apply when people make calls to others or when they are receiving a phone call. There are slightly different rules for different situations. Making and receiving personal calls are not the same as making/receiving business calls. Within this set of rules there can be variations, especially for business calls where companies may want callers or receivers to say certain things.

Calling On the Phone

- Courtesy is as important in speaking over the phone as it is talking to people face to face. Phone calls generally should not be made before 8:00 in the morning or after 9:00 at night. Try to avoid mealtimes.
- A person should always be certain of the number he is dialing to avoid disturbing someone unnecessarily. If you do reach a wrong number, it is important to say "I'm sorry, I dialed the wrong number." before hanging up.
- After someone answers the phone, the caller should give his or her name before asking for the person desired.
- When you talk on the telephone, remember your voice quality
- Express yourself clearly and concisely
- The person at the other end of the phone cannot see your facial expressions or gestures and the impression he receives depends on what she hears. The telephone carries your voice at its natural volume and pitch. Try not to shout but speak clearly and distinctly.



Answering the Phone

- The correct way to answer a telephone is "Hello." "Yes" is abrupt and a bit harsh, but "This is the Doe's house" is a bit vague and "Mrs. Doe speaking" is. . . Well, let's just put it in this way, "Hello" is the most proper way to answer the telephone.

- At work if someone calls for the supervisor, "May I speak to Ms. Brown, please?" the person answering the call must say, "Just a moment, please." If Ms. Brown is unable to come to the phone, the correct reply is "Ms. Brown can't come to the phone now. May I have your name? and she will call you back as soon as possible"
- If you must put the telephone down during the conversation, do it gently, and when you hang up, do it gently. **DO NOT SLAM THE RECEIVER DOWN.** The person at the other end may still have the phone close to his ear, and a sudden sharp bang can be hurting as well as rude.



Common Telephone Courtesy Hints:

- Make sure of the correct number so as not to risk disturbing strangers.
- Make sure that your conversations with busy people are as brief as possible.
- Time your calls so as not to interfere with the work schedule of those you call.
- Make business calls well before the close of the office hours.
- After dialing a wrong number simply say, "Sorry, wrong number."

**SORRY,
WRONG
NUMBER**

When the number you are calling is not answered quickly, wait long enough for someone to put aside what he or she is doing. It is very annoying to have been disturbed just to pick up the telephone and find the caller has hung up.

Business telephone etiquette is similar in many ways to home phone calls and reception. Yet, the business should be even more vested in remaining polite, since poor phone manners can have a negative effect on business reputation. Calling out from a business is similar to a personal call. The person should begin with a greeting, identify self, and identify employer. This should then be followed by a concise statement or request to speak to someone.

Vocal Qualities in a Nutshell

- 1) **TONE:** Expresses feeling or emotion.
- 2) **INFLECTION:** Emphasizing words and syllables to enhance message.
- 3) **PITCH:** How high or deep the voice sounds.
- 4) **RATE:** Number of words spoken per minute.
- 5) **VOLUME:** How loud or soft the voice sounds.

Let's Recap:

DO's



- Product Knowledge
- Be confident
- Assertive
- Speak slowly
- Listen to the customer
- Read between the lines
- Use positive language
- Simple language
- Build rapport
- Be focused

DON'TS



- Lack knowledge
- Be unsure / nervous
- Authoritative/aggressive
- Speak fast
- Interrupt the customer/talk over them
- Show disinterest
- Fiddle around with other things
- Negativity - I don't know/I'm not sure
- Jargon
- Get personal
- Get worked up / agitated

DO's AND DON'Ts while you are on a call

- Keep the mike a few inches away from your mouth.
- Do not eat/ chew food when on a call.
- Have a notebook & pen ready to take down information.
- Smile & be confident and speak clearly.



- Use your "please"s & "thank you"s.
- Use simple language and refrain from using jargon.
- Listen to the unspoken words of the customer.
- Pay attention to the customer....do not fiddle with papers etc.
- Avoid use of jargons, slangs and technical words

Magic Words & Phrases to Use with your Customers

However

Yes

Please

Thank you for

What I can do for you?

I agree with you / you are right

It may seem like that, however...

I realise you must be feeling quite upset at the moment....

I apologise for the delay.

I appreciate your patience.

As a special case for you.

I am pleased to tell you.

Anything else that I can do for you.

How may I help you?

My pleasure

However, I regret to tell you....

I would like to help you in this

I understand

I will help you with...

I assure you of

May I ask you a few questions so that I understand your situation better?

May I request you to

Would you mind.....

May I suggest that.....

Kindly

Certainly

That's correct, yes

I am sorry to hear that

Please hold

Have a Nice Day/ Have a pleasant evening / weekend etc.

One moment please

You are most welcome

Thank you for your co-operation



Wicked Words & Phrases - DO NOT USE!!

But

No

Never

Sorry for the Inconvenience...

That's not right

Hold the line

That's not correct

Not possible

I disagree with you

Personalise the call - Address by last name rather than by only saying Hello (when coming back from Hold)

What are you saying?

Will you

Fax me a letter

Umm, Aha, Yeh, Ya,Uh-ha, Ha

I'll try / I can't do that

Can I speak

Will you listen to me

At least try and understand / why don't you understand

You have to

Hang on

Problem noted

Must /have to

Are you sure

I don't think so/I don't know

I will not be able to call / I am not allowed calling

May be you weren't there

You must /will / have to make payment n you should....

It's not possible that you didn't receive and I think

