

Call Flow









**CSR Call Center Training
Participant Guide**

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Training-at-a-Glance

| <i>Location</i> | <i>Topic</i> |
|--|---|
|  Coaching with Supervisor | ◆ Introduction to Module |
|  Classroom: Session 1 (:60) | ◆ Module Overview ◆ Call Control Concepts ◆ Benefits of Call Control ◆ Call Flow is a GIFT |
|  Classroom: Session 2 (:70) | ◆ Four Call Types ◆ Frame the Conclusion ◆ Call Flow Puzzles |
|  Classroom: Session 3 (:60) | ◆ Call Flow Observation ◆ Call Flow Role-Plays ◆ Introduction to OTJ Practice |
|  On-the-Job Practice | ◆ Call Types and Call Flow |
|  Coaching with Supervisor | ◆ Call Types and Call Flow |



Module Overview

Purpose

The purpose of this training module is to enhance your ability to manage customer call flow to achieve a successful conclusion in the shortest period of time.

Learning Objectives

During this module, you will:

1. Define the concept of good call control and describe what is meant by call flow and a successful conclusion.
2. Describe the consequences of not using effective call control.
3. Describe the benefits of taking each call to a successful conclusion through good call flow.
4. Demonstrate the ability to apply the applicable call flow to four call types and achieve a successful conclusion.

Content Areas

This module addresses the following content areas pertaining to Call Control:

- ◆ Concept of Call Control
- ◆ Four Call Types
- ◆ Framing a Successful Conclusion to Your Calls
- ◆ The GIFT of Call Flow



Call Control Concepts

Definition

Call control is the ability of a CSR to manage the flow of a call so as to achieve a successful conclusion in the shortest period of time. A successful conclusion includes:

- ◆ Satisfying the caller's needs while satisfying the needs of The Company.
- ◆ Making the call pleasant and "easy" for the caller.
- ◆ Building a positive relationship with the caller.
- ◆ Keeping the call on track in a graceful non-overbearing fashion, without the caller feeling rushed or manipulated.

Call Flow

What is meant by managing the "flow" of a call?

Successful Conclusion

What does "successful conclusion" mean from the caller's perspective?

How do you know if the customer considers a call's conclusion successful?



Call Control Concepts, cont'd

Successful Conclusion
(cont'd)

What does “successful conclusion” mean from The Company’s perspective?

How do you know if The Company considers a call’s conclusion successful?

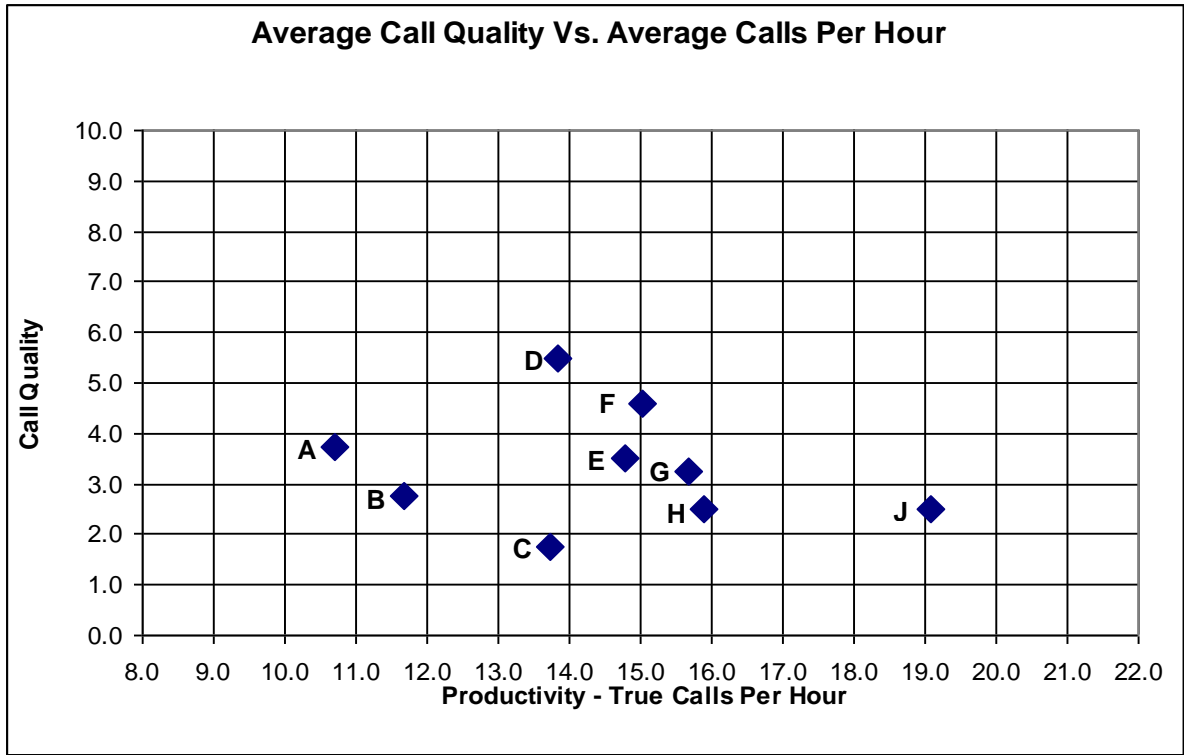
What does “successful conclusion” mean from your perspective?



Call Control Concepts, cont'd

Impact on Productivity and Quality

The chart below displays the performance of a team of CSRs in terms of call quality and productivity:



What is the relationship between good call control and productivity?

What is the relationship between good call control and call quality?



Benefits of Call Control

Introduction

Everyone benefits, including the caller, The Company, the Call Center, and you, when you properly control the call with the intent of generating a successful outcome.

Consequences of Not Using Call Control

What are the consequences of a call that is not properly controlled and/or does not achieve a successful outcome?

| To Caller | To CSR | To The Company |
|-----------|--------|----------------|
| | | |

Benefits of Call Control

What are the benefits when a call is properly controlled and achieves a successful outcome?

| To Caller | To CSR | To The Company |
|-----------|--------|----------------|
| | | |



Call Flow Is a GIFT to the Customer

Introduction

Call flow refers to the progression of a call from the moment the CSR greets the caller until the call is concluded. It is one of the core skills needed to demonstrate proper call control.

The concept of call flow has two components:

- ◆ Steps the CSR takes that work toward a successful conclusion, and
- ◆ The sequence of these steps.

A G-I-F-T to the Customer

Most calls follow a common flow that has these phases:

Greet
caller

G

Identify
need

I

Frame
conclusion

F

Take
action

T

Conclude
call

to the **C**ustomer





Call Types

Introduction

Once you've greeted the caller and identified his/her needs, you should be able to determine the type of call, based on the four call types listed below. Determining the call type helps you envision how the call should flow from that point forward...until you reach a successful conclusion.

ABCs of Call Type

There are four general call types, based on why customers call:

1. **A**cquire information
2. Solve a **b**asic problem or dispute
3. Solve a **c**omplex problem/dispute
4. **C**hange existing information



Call Types, cont'd

Activity:
Defining Call
Types

Place the number associated with each definition next to the correct call type.

Call Types

- ___ Acquire information
- ___ Basic problem or dispute
- ___ Complex problem or dispute
- ___ Change existing information

Definitions

1. *Customer calls to update or modify his/her information.*
2. *Customer calls to obtain information.*
3. *Customer has a problem or dispute that seems to have many components to it.*
4. *Customer has a problem or dispute that seems to have only one component.*



Frame the Conclusion

Introduction

Achieving a successful conclusion is the priority of every call you handle, because it implies providing excellent customer service and meeting the needs of the caller. A powerful way to achieve a successful conclusion is being able to visualize that outcome as well as the steps you'll take to achieve it.



Since framing a successful conclusion is primarily a visual activity, the way that CSRs demonstrate having done it successfully is by telling the caller what actions they will be taking during the call.

Activity: Frame a Successful Conclusion

Instructions: For each call type the Trainer plays, describe the caller's specific need, visualize a successful conclusion, and then describe what that conclusion might look like. See example below.

Example:

| Call Type | Customer's Need | Successful Conclusion |
|---------------------|---------------------------------------|--|
| Acquire Information | Acquire the date of the last payment. | Provide customer date of last payment within 1 minute and suggest alternate or more convenient ways of acquiring this information. |



Frame the Conclusion, cont'd

Activity: Frame a Successful Conclusion, (cont'd)

| Call Type | Customer's Need | Successful Conclusion |
|----------------------------------|-----------------|-----------------------|
| Acquire Information | | |
| Solve Basic Problem or Dispute | | |
| Solve Complex Problem or Dispute | | |
| Change Existing Information | | |



Call Flow Observation

Activity

Rate the ability of a representative from another company's Call Center to control a call and follow the call flow.

Take notes below regarding your observations.

G

I

F

T

C



Call Flow Role-Plays

Complete one Call Flow Worksheet for each role-play.

| Call # | Select Call Type: | Circle Missed Phases/Steps: | | | | Notes: |
|--|-------------------|---------------------------------------|---|---|---|--------|
| | | <input type="checkbox"/> Acquire Info | G | 1 | 2 | |
| <input type="checkbox"/> Basic Problem | I | 1 | 2 | 3 | 4 | |
| <input type="checkbox"/> Complex Problem | F | 1 | 2 | 3 | 4 | |
| <input type="checkbox"/> Change Info | T | 1 | 2 | 3 | 4 | |
| | C | 1 | 2 | 3 | | |

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Call Flow Role-Plays, cont'd

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On-the-Job Practice

Introduction

On-the-job practice is an effective way to practice a new skill with minimal impact on you or the department's productivity. During your practice sessions, handle your customer service calls using Call Flow in addition to following normal procedures.

When you have concluded each call, you will complete a brief self-assessment of your call flow performance. This self-assessment is an effective way to help you maintain awareness of your call flow skills as you continue to master them.

Before You Begin Your Practice Session

1. Meet with Your Supervisor

Designate practice start time and discuss any areas of concern.

Determine number of calls to answer during practice session.

Photocopy the Call Flow Self-Assessment sheet before beginning each practice session.

Begin OTJ Practice Session

2. Begin Practice Session

Apply Call Flow to each incoming call.

Use the Call Flow Job Aid.

3. After Each Call

At conclusion of each call, fill out the Call Flow Worksheet.

Go on *Not Ready* for up to 1 minute.



On-the-Job Practice, cont'd

**End OTJ
Practice
Session**

4. At the End of Practice Session

At the conclusion of your session, notify your Supervisor and arrange a debrief meeting.



5. Meet with Your Supervisor

Meet your Supervisor and debrief the results of your practice session.



Determine areas of strength and weakness.



Schedule additional practice sessions, if necessary.



Call Flow Worksheet

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