What's HOT!

Things your customers like:

- Promptly answering the phone by the third ring.
- Speaking clearly.
- Providing continuous phone coverage during business hours.
- Showing respect for the customer’s time. If you have to keep the caller on hold for more than 30 seconds, offer to call them back once you’ve gathered the necessary information.
- Asking permission to place the caller on hold.
- When transferring calls, putting the call through to the other party, introducing the caller and then bowing out. Prior to completing the transfer, tell the caller the name of the person to whom you are transferring the call and give the extension number.
- Using the caller’s name.
- Letting the customer hang up first.
- When placing a call, identify yourself by first and last name. Don’t assume the person answering your call can recognize your voice.

Remember, to the customers you are the Bank. You come to mind when they think about their Bank. Make this relationship a special one each time they visit or call. These positive experiences will keep them coming back to the Bank, to your office and to you!

What's NOT!

Things they don’t like:

- Answering a call with a speaker box.
- Rushing your greeting.
- Getting trapped in “voice mail jail”.
- Menu options that aren’t user-friendly.
- Chewing gum or eating while on the phone.
- Speaking too softly.
- Using bank “jargon” that confuses the caller.
- Laying a receiver down without putting the caller on hold.
- Leaving a caller on hold for more than 30 seconds without checking back with them.
- Walking up to someone who is on the phone and starting to talk to them. If you can’t wait, write a note.
- Saying, “Have a nice day”. It’s over-used and often inappropriate.
- Using a forbidden phrase: “I don’t know”, “Just a second”, “No” (at the start of a sentence), “We can’t do that” or, “You’ll have to…”.
- “Bounced caller syndrome”.
- Letting your mind wander and losing focus on what the caller is saying.
- Asking the caller multiple times what they need.