Mock Call Exercise 2 – Managing an Unhappy Customer Call

Trainer information

A customer is calling because they are not happy about not receiving a promised call back. The customer wants the advisor who is dealing with query to call her back today!

1. This is a mock call to practise greeting customers, undertaking DPA, identifying the reason for the call, demonstrating empathy regarding the customers complaint about not receiving a call back and providing an effective solution.

2. Customer's Profile: Female 40s Unhappy but calm and polite. (provide when asked) Example: Mrs Janice Wright, D.O.B 20/10/1979, Address 40 Bryony Street, CardIff, CF14 4RZ , Account number 54897848.

Note

If the advisor offers to help, politely refuse, and ask for reassurance that the person who is dealing with her query call to call her back.

The advisor should ask the customer if she is happy to be put on hold, whilst she checks with her colleague who is dealing with the enquiry. The advisor should then confirm her colleague will call her back and agree a time.

Call Guidance for the Advisor

1. **Greet the customer** using the appropriate company greeting and in a polite and friendly tone. Work with alternatives if the customer doesn't have their account number: E.G. Two security questions answered correctly.

2. Identify the reason for the call

- Actively listen
- Ask clarifying questions
- Get agreement on what the call is about

3. Demonstrate empathy due to the customer's complaint.

Provide an apology and empathy with sincerity.

Explain what you will do to help e.g. Take the customer's contact details and reassure her that your colleague who is dealing with the query will call her back by 2pm.

Check the customer is happy with your solution.

4. Personalisation

Use the customer's name during the call.

5. Close the Call

Reconfirm your agreed actions with the customer.

Ask the customer if there's anything else you can help with?

Thank the customer for calling.

Trainer Feedback Checklist

After the roleplaying exercise, the trainer should provide feedback on the following:

- Did the advisor provide the correct company greeting?
- Did the advisor sound confident and welcoming?
- Was correct DPA carried out and alternative questions asked when needed?
- Was there a good use of questions to correctly identify the reasons for the call?
- Did the advisor demonstrate good listening through verbal nods and by repeating back information to check understanding of the issue?
- Was a sincere apology given?
- Did the advisor demonstrate empathy?
- Was the correct solution offered?
- Did the advisor put the customer on hold correctly?
- Was a time for the call – back agreed with the customer?
- Was the customer's name used during the call?
- Did the advisor check the customer was happy with the solution?
- Were contact details repeated back to the customer?
- Was the call closed correctly to avoid an unnecessary repeat contact?