

Building a Better Caller Experience

Your Guide to the Employee Self-Assessment Process

WHY SELF-ASSESS?

Did you know that
the use of Fitbits
has **INCREASED**
400% since 2013?



WHY SELF-ASSESS?

People enjoy achieving the goals they set and Fitbit offers a way to easily track progress and master an exercise routine.

Similarly, the employee self-assessment process is a method that employees can use to evaluate their own phone performance so that they can fine-tune their skills and provide an **excellent caller experience.**

SELF-ASSESSMENT FORM



AREAS TO EVALUATE



1. Did you open with a great first impression?

“Good morning! This is Pat Shaughnessy from Cabela’s Boating Center speaking; how may I help you?” (with a :-) in your voice)

FACT: Only 4% of dealership employees state their first and last name when answering a call, yet 90% of employees stated their first & last name on their voicemail greetings. Let’s formally greet our callers.

AREAS TO EVALUATE



2. Did you effectively bridge into questioning?

“I’m happy to help! Let’s get you some answers.”

Ask questions to determine the caller’s situation. Consider whether you took the opportunity to ask questions and provide information to:

Develop rapport: Confirm how the caller enjoys their boat. Search for areas of agreement.

Ask elevating questions: Determine features that are important to the caller and why.

AREAS TO EVALUATE



3. Did your question technique position you as a “trusted advisor” to the caller?

Did you know? A recent study says that 79% of customers say that it’s critical to work with representatives who doesn’t just ask questions and provide information, but interacts in such a way that the customer views them as a **TRUSTED ADVISOR.**

AREAS TO EVALUATE



4. Did you convey empathy and acknowledge emotion where applicable?

- Using phrases like the following can be helpful to show **care and concern** for the caller and their unique situation:
- “I realize how complicated it is to”
- “I can see what a huge impact this has on”
- “I know how confusing it must be when”



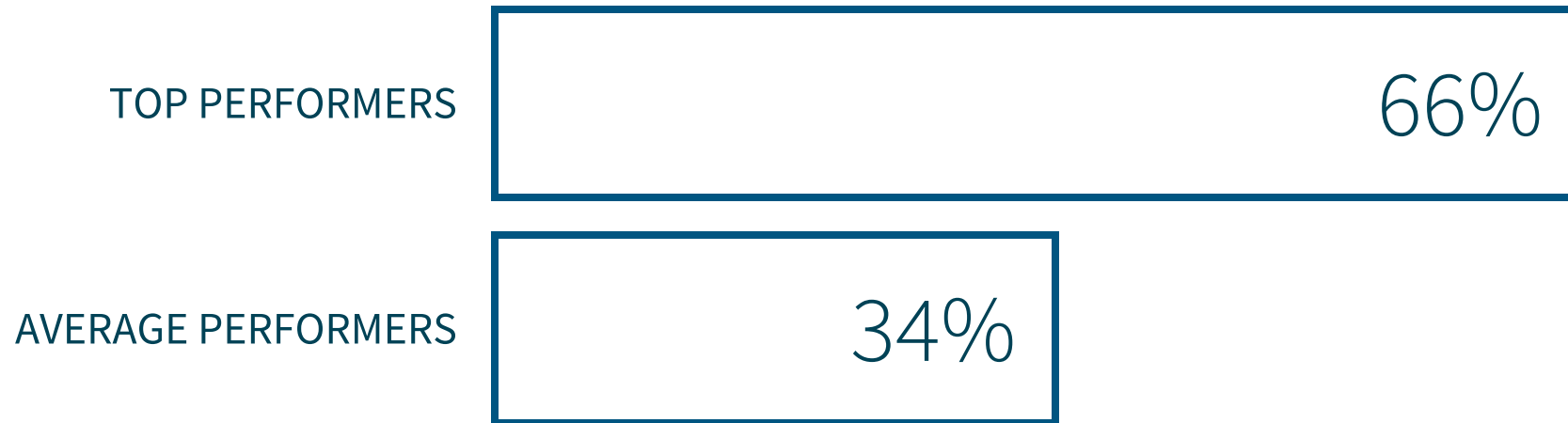
SOMETIMES USING EMPATHY WHEN SELLING MEANS TAKING A STEP BACK AND **LISTENING**

In every sales conversation, whenever you face a concern, the person that exerts the greatest amount of emotional intelligence is going to have the highest probability of getting the outcome they desire – which for an employee helping a customer buy or service a boat, it means you're able to address caller concerns effectively.

This begins with your ability to manage your emotions and reduce resistance. Start by viewing concerns as opportunities to make the caller feel comfortable in the process. Additional best practices gleaned from successful phone skills where sales representatives were able to resolve customer concerns, include:

DON'T BE A ROBOT!

Successful Employees Ask More Questions After Objections



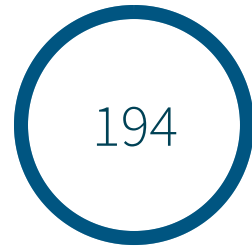
Asking more questions and speaking less after the caller poses a concern yields more success. When you listen more than you talk, the caller is confident that they are being heard and that the situation is being addressed in their best interest.

SLOW DOWN!

Successful Employees Match Customer Pace



TOP PERFORMERS
WORDS PER MINUTE



AVERAGE PERFORMERS
WORDS PER MINUTE

Moving and speaking too quickly frustrates customers, makes them feel rushed and as you aren't giving them and the interaction adequate attention. Top performers slow their pace to match the caller!

AREAS TO EVALUATE



5. Did you provide differentiator statements to demonstrate your store's value proposition?

Examples of differentiator statements:

"Do you understand how our pricing works here?"

"Are you familiar with our warrantee?"

AREAS TO EVALUATE



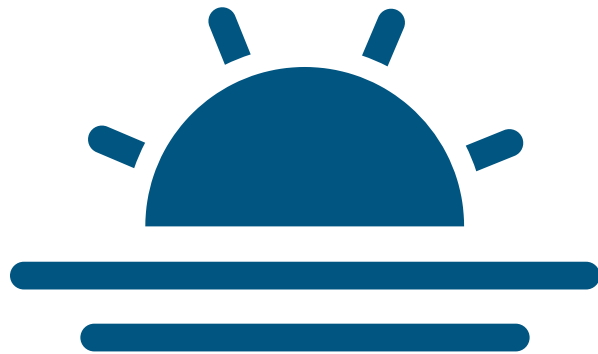
6. Did you transition into next steps in a way that was **comfortable for the caller** and provided them with the information they needed?

Examples of next steps:

“Based on our conversation, it sounds like this boat is a great fit for you, may I schedule an appointment for you to come in and do a walk around?”

“I’ll find out as soon as we hang-up this from this call. What’s the best way to reach you with an answer? Call or text?”

AREAS TO EVALUATE



7. Did you provide a warm closing at the end of the call to create a positive lasting impression?

A warm closing ensures that the caller is left with a **great lasting impression of you and your store**. Close your calls strong and with as much energy and enthusiasm as you showed at the beginning of the call.

AREAS TO EVALUATE

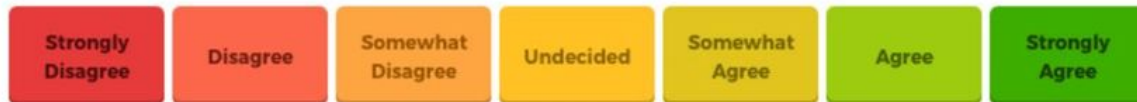


9. Based on the experience you just reviewed, how likely would you be to **REFER A FRIEND** to your store?

Congrats! You just gave yourself a **net promoter score!** Learn more about net promoter and how its benefits here:

<https://www.netpromoter.com/know/>

AREAS TO EVALUATE



10. To what extent do you agree with this statement, “I **MADE IT EASY** for this caller to do business with me and my store.”

The reason we include **Customer Effort Score (CES)** as a question on this self-assessment is because CES is a primary indicator of a customer’s loyalty.

When it comes to service, companies create loyal customers primarily by helping them solve their problems quickly and easily.

SUMMARY



Did you open with a great first impression?



Did you bridge into questioning?



Did your question technique position you as a “trusted advisor”?



Did you convey empathy and acknowledge emotion if applicable?



Did you provide differentiator statements to convey value proposition?



Did you transition into next steps in a way that was comfortable for the caller and provided them with the answers they need?



Did you provide a warm closing at the end of the call?



NPS & CES provide you with an opportunity to be self-introspective and put yourself in the caller's shoes!