PHASE 1

Professional Greeting & Bundled Response

SET A CALM, HELPFUL TONE IN THE FIRST MOMENTS OF THE CALL.

Start with a clear introduction, hear the reason for the call, and respond with both an offer to help and an acknowledgment of the customer's concern.

1. Greet & respond | 2. Verify & explain | 3. Build rapport | 4. Resolve & retain | 5. Recap & close

THE CALL SEQUENCE

1. **CONNECT PROMPTLY**
   Greet the customer warmly, state your name, and ask for theirs.

2. **LISTEN BEFORE GATHERING DETAILS**
   Let the customer explain the request. Note the issue and its impact before moving into account questions.

3. **BUNDLE HELP WITH UNDERSTANDING**
   Offer to take ownership and acknowledge why the issue matters in the same response.

4. **SET THE NEXT STEP**
   Briefly explain what you will review first, then transition into verification.

ORDER OF OPERATIONS Greeting → customer reason → help + understanding → verification

EXAMPLE LANGUAGE

BILLING QUESTION

"I can review the charges with you. I understand why you want a clear explanation of what changed."

SERVICE ISSUE

"I'll help investigate the interruption. I know reliable service is important, so let's work through what happened."

COACHING WATCHOUTS

- Asking for account numbers before acknowledging the concern.
- Offering help without showing that you understood the impact.
- Giving a vague apology with no clear next step.

PHASE 2

Account Verification & Explaining Why

PROTECT THE ACCOUNT WHILE MAINTAINING A NATURAL CONVERSATION.

Once you have acknowledged the request, gather only the information needed to follow your organization's security process. Explain the purpose of each request.

1. Greet & respond | **2. Verify & explain** | 3. Build rapport | 4. Resolve & retain | 5. Recap & close

THE CALL SEQUENCE

1. **TRANSITION AFTER THE RESPONSE**
   Complete the help-and-understanding response before asking for account identifiers.
2. **ASK, DO NOT DEMAND**
   Request information politely and explain that the step protects the customer's account.
3. **FOLLOW THE APPROVED PROCESS**
   Use the required verification method. Do not disclose protected details or allow repeated credential guesses.
4. **KEEP THE CUSTOMER INFORMED**
   Describe what you are checking, thank them for verifying, and confirm a callback number if needed.

ORDER OF OPERATIONS Acknowledge → explain purpose → verify → confirm next action

EXAMPLE LANGUAGE

SMOOTH TRANSITION

“I’m happy to review that with you. To protect your account while I pull up the details, may I complete a quick verification?”

IF VERIFICATION CANNOT BE COMPLETED

“I understand this is frustrating. I can still explain the general options available while we work through the approved next step.”

COACHING WATCHOUTS

- Using abrupt commands such as “Give me your PIN.”
- Starting verification without explaining why information is needed.
- Working around failed verification or sharing protected account details.

PHASE 3

Tenure-Based Rapport & Active Discovery

RECOGNIZE THE RELATIONSHIP AND UNCOVER NEEDS BEYOND THE INITIAL REQUEST.

After verification, use the customer's history as a brief, relevant bridge into discovery. Ask about the broader experience without delaying the original issue.

1. Greet & respond | 2. Verify & explain | **3. Build rapport** | 4. Resolve & retain | 5. Recap & close

THE CALL SEQUENCE

1. **PLACE RAPPORT AT THE RIGHT TIME**
   Recognize tenure after verification and before the deeper investigation.

2. **THANK THEM SPECIFICALLY**
   Use an accurate tenure detail, thank them for their time with the service, and keep the statement conversational.

3. **ASK ONE OPEN QUESTION**
   Invite the customer to share how their service or account has been working overall.

4. **OWN ANYTHING YOU UNCOVER**
   Acknowledge secondary concerns and agree on when you will address each one.

ORDER OF OPERATIONS Verified account → tenure acknowledgment → discovery → issue plan

EXAMPLE LANGUAGE

LONGTIME CUSTOMER

“I see you’ve been with us for several years. Thank you for staying with us. How has everything been working for you lately?”

NEW CUSTOMER WITH ANOTHER ISSUE

“Welcome aboard. How has the setup been so far? I’ll handle the billing question first, then we’ll look at the coverage issue you mentioned.”

COACHING WATCHOUTS

- Saving the rapport question until the customer is ending the call.
- Reading a tenure statement mechanically without listening to the answer.
- Acknowledging a second concern but never returning to it.

PHASE 4

Proactive Resolution & Retention Handling

FIND THE CAUSE, OFFER USEFUL OPTIONS, AND CLOSE THE LOOP.

Move past the surface request to identify the underlying cause. Explain relevant options, respond to signs of dissatisfaction, and document the result while the details are fresh.

1. Greet & respond | 2. Verify & explain | 3. Build rapport | **4. Resolve & retain** | 5. Recap & close

THE CALL SEQUENCE

1. **INVESTIGATE THE ROOT CAUSE**
   Ask focused questions about changes, patterns, expectations, and prior contacts.
2. **OFFER PROACTIVE ASSISTANCE**
   Share suitable self-service or support options and explain what each option would accomplish.
3. **RESPOND TO CANCELLATION SIGNALS**
   Acknowledge the concern, restate the goal, and present only eligible, accurate options.
4. **ADDRESS PAST FAILURES**
   Own missed follow-ups or unresolved work and give a concrete next step with a realistic timeline.
5. **DOCUMENT DURING THE CALL**
   Record the issue, verification status, actions, outcome, and next owner in approved notes.

ORDER OF OPERATIONS Cause → options → agreement → documentation

EXAMPLE LANGUAGE

PRICE OR VALUE CONCERN

“I hear that the new total is making you reconsider the service. Let’s review what changed and check which options fit your needs.”

REPEAT CONTACT

“I want to find what caused this so you don’t have to call again. I’ll check the earlier work and explain the next step before we finish.”

COACHING WATCHOUTS

- Going silent during research without telling the customer what you are doing.
- Treating a cancellation statement as an ordinary billing question.
- Promising a fix, discount, or callback that has not been confirmed.

CUSTOMER SERVICE / FRONTLINE JOB AID

PHASE 5

Bundled Recap, Satisfaction Check & Close

FINISH WITH CLEAR EXPECTATIONS AND A CONFIDENT HANDOFF OR GOODBYE.

Summarize what was done, confirm any next steps, and make space for remaining questions before ending or transferring the interaction.

1. Greet & respond | 2. Verify & explain | 3. Build rapport | 4. Resolve & retain | **5. Recap & close**

THE CALL SEQUENCE

1. **RECAP THE WORK**
   Name the issue, actions taken, and outcome in plain language.

2. **CHECK SATISFACTION EXPLICITLY**
   Ask whether the customer is satisfied with the resolution while you can still help.

3. **OFFER ONE FINAL OPPORTUNITY**
   Invite remaining questions or account needs before a transfer or disconnect.

4. **CLOSE WITH APPRECIATION**
   Thank the customer for their time or business and end warmly.

ORDER OF OPERATIONS Recap → satisfaction → remaining needs → thanks

EXAMPLE LANGUAGE

STANDARD RESOLUTION

“To recap, we reviewed the charge, corrected the account detail, and confirmed what you’ll see next. Does that resolve your concern today?”

BEFORE A TRANSFER

“I’m ready to connect you with the next team. Before I do, is there anything else I can clarify about what we covered?”

COACHING WATCHOUTS

- Ending immediately after answering the main question.
- Transferring without explaining the next step or checking for questions.
- Using a rushed “Anything else?” in place of a clear recap and satisfaction check.