



## **SCORING BIG POINTS ON THE TELEPHONE**

### **Turning Frustration into Satisfaction by Making People Feel Important**

by

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The 2007 Legal Marketing Association's Annual Conference held earlier this year in Atlanta was terrific. In fact, it was one of the best ever. Among the speakers I had the pleasure to hear was Harry Beckwith, author of a number of best-selling books on business-to-business sales and marketing. His all-time best is *Selling the Invisible*, in my opinion.

One of Beckwith's main points during his talk focused on the concept of making people feel important. That's how you create great friendships and loyal clients, Beckwith says.

And you make people feel important by practicing some pretty basic techniques. Pay attention when they talk. Seek to understand their issues and concerns. Be accessible and responsive to their needs. Follow through and do as you say you will. Show that you care. It's kind of like the Golden Rule: Do unto others as you would have them do unto you.

Stay with me here...

Now consider how many hours you spend on the telephone every workday....not just speaking to your intended party, but also the time you spend getting to that person – listening to the phone ring on the other end; being screened in an oh-so-obvious manner; being placed on hold and forgotten about; being transferred from person to person; being accidentally disconnected; listening to long-winded, out-dated voicemail greetings; playing endless rounds of phone tag. It's enough to drive you (and your clients) crazy!

In fact, my assistant and I were talking last week about how rare it is these days to actually get the person you want on the telephone when you place a call.

Every time a client, prospective client or referral source interacts with your firm (often by telephone call), he or she comes away with a positive, neutral or negative impression. Obviously, we want as many positives as possible. Making people feel important and letting them know you care leaves them with a positive impression. And it's often the little things that make a big difference.

For your clients, getting you on the phone can be a frustrating experience. But it doesn't have to be. How you and your law firm handle telephone calls speaks volumes. It communicates the importance you and the firm place on client service, and it either makes people feel important or it doesn't.

Follow these common sense tips to make people feel important.

### *When You Are Receiving the Call.....*

#### **Answer Your Phone Before the Third Ring**

Everybody in the customer service business talks about how important this is, but it's easier said than done. The point is not to let your phone ring any longer than it has to. For example, if you will be on a long conference call or out of the office for an extended period, make sure your calls are properly forwarded so they are answered more promptly. Also, if you are already on the phone when a second call comes through, it's OK to put the first caller on a brief hold to answer the second call.

#### **Offer a Warm, Enthusiastic Greeting**

A warm and friendly greeting is a beautiful thing and how you answer your telephone goes along way toward getting the conversation going in the right direction. Answer with your name, company name and a genuine, "How may I help you?" (Sincerity helps.) If you know the caller well, a few moments of chit-chat might also be appropriate before you dive into business.

#### **Create a Personal Voicemail Greeting**

Record your own personal voicemail greeting. It helps convey the fact that you are, in fact, the caring, accessible lawyer that you say you are. Your greeting should be short, friendly and in your own (not your assistant's) voice. You might want to modify your greeting from time to time. If you will be out of the office for an extended period of time, modify your greeting to include details about when you will return and who to contact in your absence. Add a message bypass feature for those who call you frequently. And if you are one of those people who like to change his or her greeting every day, make sure to change it every single day.

#### **Pay Attention and Really Listen to Your Caller**

Nothing says "you are important to me" more than actively listening to and empathizing with the person with whom you are interacting. When a client (or other VIP) calls, you must give him or her your full and undivided attention. Put yourself in the client's shoes and to try to see things from his or her perspective. Keep distractions and background noise to a minimum. During longer conversations, it's a good idea to take notes and pause at key points in the conversation to summarize what you just heard. By the way, people have a way of knowing when you're not really paying attention, even over the phone.

#### **Give Your Best Contacts Your Cell and Home Numbers**

Clients want access to their lawyers, and knowing they can get you 24/7 can be a big deal to them. It makes them feel important. Give them your direct dial, cell and/or home phone numbers. Also, when a client calls a lawyer at your firm, the call should first ring on the lawyer's (or intended party's) desk, then to the assistant if there is no answer. If the assistant is unavailable, the call should go to the receptionist. If no one is available to help the client at the time of the call, voicemail should be offered as a final option. Yet, many law firms are set up the opposite way. An incoming call comes in through the main switchboard and the caller is forced to navigate through a receptionist and an assistant before finally getting the lawyer. Finally, never slam a caller directly to voicemail without first asking for permission to do so. Put yourself in your client's shoes and call your office using a disguised voice one day. Were you treated right?

#### **Use Discretion When You Screen Your Calls**

For whatever reason, I've noticed that lawyers love to screen their phone calls. It makes them feel important, I guess. I don't know about you, but I tend to get offended when my call is screened once, sometimes twice, when I am returning someone else's phone call. The practice tends to say, "I'm important. You're not. Consider yourself lucky if I decide to talk to you."

### **Always Return Phone Calls Promptly**

I shouldn't have to say this, but I will. You must get in the habit of returning your phone calls by the end of the business day. Some clients are even more demanding than that. I recently met a general counsel who insists that her outside law firms get back to her within an hour when she calls or sends an e-mail. Demanding? Yes. But it's something you need to know if you want to keep her business. Also, it's a good idea to check your voicemail several times a day, especially if you're out of town.

To summarize: Be accessible. Be responsive. Show you care.

### ***When You Are Placing the Call.....***

#### **Find a Quiet Place**

When you are away from your office placing an outbound call, find a quiet place that is free of distractions and background noise – a place where you have easy access to any items or paperwork you might need. Of course, this is not always practical. But try your best, especially for your more important calls and in those situations where you will be making your “first impression.” First impressions are powerful and lasting. We want it to be a good one!

#### **Be Friendly Along the Way**

Always be friendly to receptionists and assistants as you work your way toward your intended party. Take the time to say hello, get to know names and ask how their day is going. (A little sincerity never hurt!) These people are gatekeepers and determine what gets through to the decision-maker. We want your stuff to get through and we want it put on top of the pile. If they like you, these folks can perform miracles and will go the extra mile to help you. On the other hand, they can hurt you, too. Be nice to them.

#### **State Your Name and Purpose**

Start your conversation by stating your name and the purpose of your call. Speak clearly and be warm, friendly and upbeat. Your initial greeting is especially important if you're not well known to the person you are calling, and it's even more important if you've never met the person you are calling. You only get one chance to make your “first impression.”

#### **Be Sensitive to The Other Person's Situation**

After your introduction be sure to ask, “Is now a good time to talk?” If you get a green light, give the person an idea how long the conversation is likely to last and get to the point as quickly as possible. Let the other person set the tone and pace of the conversation. Some people talk fast. Others don't. Be sensitive to clues. If you don't get a green light, schedule an appointment when the person will be available to speak with you.

#### **And If You Do Get Voicemail**

Of course, there is a good chance you will get voicemail. When leaving a message, follow these tips:

- Speak slowly and clearly
- State your name - spell it, if necessary - and the purpose of your call
- Keep your message short and to the point
- Indicate the best time to call you back
- Leave your call-back number at both the beginning and end of your recorded message
- Be sensitive to confidentiality as others might hear the message you leave

### **Make All Your Outbound Calls First Thing in the Morning**

Time management studies reveal that multi-tasking and flipping back and forth between projects waste huge amounts of time for the average professional....up to two hours a day. For maximum efficiency, schedule all your outbound calls during one single block of time. We recommend first thing in the morning, letting people know the best times to get back to you during the course of the day if you don't get through to them.

### **Place Your Own Calls**

You've had it happen before. The phone rings. You pick it up and a formal, rather unfriendly, assistant asks, "Is this Mr. Smith?" After you say yes, the voice says, "Please hold for Mr. Big Shot" and you are placed on hold. Then Mr. Big Shot picks up the line and launches into some long-winded monologue over a speaker phone. Yikes! Don't be like that. Pick up the phone and place your own calls.

To summarize: Be friendly. Be flexible. Show you care.

### ***And No Matter Who Placed the Call.....***

### **Never Use a Speaker Phone without First Asking Permission**

There are times when it's convenient, even necessary, to use a speaker phone. But always ask permission from the other party before you put him or her on a speaker phone. To do otherwise is rude.

### **Consider E-Mail Instead**

Before you place a call, consider whether or not a quick e-mail might be a more efficient way to exchange information with your intended party. Many people prefer it. Keep in mind, however, that you leave a paper trail.

### **Turn Off Your Cell Phone from Time to Time**

There are times when it's appropriate to leave your cell phone or Blackberry at home. That all-important lunch meeting with a new client. The CLE conference you are attending. Any nice restaurant. Your kid's recital. Besides that, it's rude in many cases to take a phone call when you are in the presence of another person. A ringing, unanswered cell phone is just as obnoxious. If you absolutely must be reachable, put your phone in vibrate mode and politely excuse yourself if you must take a call.

By practicing these techniques, you and your firm will go a long way toward becoming a more client-friendly law firm - one that truly cares about its clients and its community. It's about making people feel important.

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### **About the Author**

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