Essential
SKILLS · TRAINING

Call Centre

A partnership project of Quinte Adult Day School
and
Literacy Link Eastern Ontario

Prepare to work at a Call Centre

Essential
SKILLS • TRAINING

This program is ideal for anyone planning to work at a Call Centre. The six module curriculum, produced by Literacy Link Eastern Ontario, provides the Essential Skills training required for this growing industry.

Modules of study include:

1. Introduction to Call Centres
- What is a Call Centre

2. Professionalism
- Attitude
- Appearance & Grooming
- Attendance
- Working as a Team

3. Customer Service
- What is Customer Service?
- Good vs. Poor
- Types of Service
- Customer Needs
- The Upset Customer

4. Telephone Skills
- The Art of Listening
- Telephone Etiquette
- Telephone Anxiety
- Opening a Call
- Logging a Call
- Closing a Call
- Call Monitoring

5. Computer Skills
- Basic Hardware
- Basic Software
- The Internet
- Email

6. Health & Safety
- Laws & Legislation
- Human Rights
- Health Concerns
- Ergonomics
- Workers Compensation

178 pages
LBS 2 required

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Call Centre Essential Skills Training

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Module 1
Introduction to Call Centres

What is a Call Centre?

Call centres are used by companies and governments to provide customer service and support by telephone. Call centres can be:
- in-bound
- out-bound
- both

In-bound centres, or help desks, answer customer questions and/or give technical support.

Out-bound call centres call customers to promote products or services – the traditional *telemarketing* job.

Call centres started out as basic telemarketing centres that used *cold-call* selling to get you to buy products over the telephone. Now call centres are rapidly becoming *transaction centres*, places to get service, support and products. As a result, customer service has become extremely important.

Call centres are based on telecommunications and computer technologies. Some of theses technologies are:
- *automatic call distribution*: answer and queue (pronounced "Q")/hold calls
- *interactive voice response*: prompts (for example "Please push 1 for service in English)
- *predictive dialers*: this automatically dials telephone numbers and, if the telephone is answered, the call centre agent is notified

 These changes, together with reduced telephone rates, make call centres an attractive business option. They allow companies to improve on their customer relations. This builds customer loyalty in a *cost-effective* way. Call centres save companies and consumers money and time. They help customers who want to phone anytime, day or night, to do business such as banking transactions.

LEARNING ACTIVITY #1

Match the definition to the term.

1. ___ in-bound	a) calls coming into a call centre
2. ___ out-bound	b) selling to a stranger over the phone
3. ___ predictive dialers	c) calls going out of a call centre
4. ___ cold-call selling	d) numbers are dialed on phone lines for a group of agents automatically

LEARNING ACTIVITY #2

Contact a local call centre and find out if they are inbound (only take calls from outside) or outbound (they call out to try to sell products). Also, try to find out what companies or industries they have contracts with. It is probably best to complete the curriculum first before doing this activity.

Recent Trends

The number of call centres has increased in the last decade because *business transactions* in North America are increasingly handled by telephone. As *toll-free* numbers grow and 24-hour services increase, so does the number of people needed to answer the calls and manage the centres.

Call centres can be found servicing almost every industry these days, including insurance companies, financial service institutions, health care institutions, the hospitality industry, utility companies, government departments, telecommunications companies and retailers. Some of the strongest demand for call centres is coming from banks and long-distance providers of loyalty programs such as Air Miles and Canadian Airlines' travel points.

Call centres have become very important *strategic marketing tools*, providing companies with a *link* to customers, and giving them an advantage in an increasingly competitive economy. To stay competitive these days, companies need to be ready *to engage a customer* at any time of the day or night and, in a *global economy*, anywhere in the world.

LEARNING ACTIVITY #3

1. __ global economy	a) Air Miles (keep customers)
2. __ loyalty program	b) long distance numbers that are free
3. __ link	c) doing business all over the world
4. __ toll-free	d) a connection

Call Centre Occupations

A person who works in a call center is called a **Customer Service Representative (CSR)**.

Common job titles include:
- customer service clerk
- inquiries clerk
- business information clerk
- public relations clerk

These clerks answer questions and provide information about a business's goods, services and policies. They provide customer services such as receiving payments and processing requests. They gather the information required to provide services.

They are employed by the retail sector, insurance industry, telephone corporations, utility companies and by other establishments throughout the private and public (government) sectors.

Customer service information and related clerks generally work in the company's reception area or in call centres. Much of the work now occurs over the telephone. Interactive voice response, predictive voice response and automatic call distribution are changing the nature of the work. Only one percent of people in this occupation are self-employed. Most are employed with large organizations or small businesses.

Duties of CSRs fall under the following categories:
order entry, *customer service*, *telemarketing* and *help desk*. It is in the Help Desk field that you can use your expertise in trouble-shooting with computer keyboarders.

As the use of home computers increases and the world of the Internet enlarges, this type of call centre work is increasing.

LEARNING ACTIVITY #4

Match the job type to the correct job descriptions.

1. __ Order Entry
2. __ Customer Service
3. __ Telemarketing
4. __ Help Desk

a) Where sales techniques are used to promote products and services. Every time you answer your telephone and are asked, Have you joined a long distance telephone savings plan? You are speaking to a call centre worker.

b) Where customer relationships are maintained. Every time you call a community college or university to ask about courses to take, you are connected to a call centre.

c) Where orders are taken over the telephone. Every time you call for pizza delivery, you are connected to a call centre.

d) Where you telephone when you are in urgent need of computer assistance when your software application or Internet provider crashes.

Working conditions

The call centre workplace is a *fast-paced* customer service or sales environment. Call productivity is the most important thing in running a successful call centre. The more calls a CSR can handle, the better.

CSRs must be *self-disciplined* and have the ability to manage *challenging* calls and *cope with* the resulting *stress*. They might answer up to 100 or more calls per day, although fewer calls are answered at the *technical help desk*, where customer needs are often very complex.

CSRs are *monitored* to identify training needs and *measure performance*. Calls are monitored in order to identify whether or not a CSR is performing the job properly, and up to company standards. Further training and coaching may be required to help the CSR to do a better job.

Types of Coaching	
Drive-by	The coach or supervisor overhears the CSR's response to a customer while walking by.
Remote monitoring	The supervisor or coach listens to calls from a location away from the rep's workstation.
Side-by-side coaching	The coach or supervisor sits beside the rep, usually listening in on a headset to both sides of the call.

Some CSRs find call centres stressful places to work. Call volumes, feedback and call monitoring by managers, and a structured schedule sometimes intimidate them. Every minute is money in call centres and a schedule must be followed. The schedule will include start and stop times at the beginning and end of your day, as well as breaks and lunches. It is important that CSRs stick to schedules. They should also be able to *multitask*, using different software packages and technologies.

CSRs can advance to the position of team leader, supervisor or manager and can progress from the call centre to the larger organization. CSRs can advance to team leader or supervisor positions fairly quickly *due to* high demand and staff *turn over*.

In addition to technical help desk positions in call centres, there are opportunities for technically-trained people including *trouble-shooters* and technical trainers. Experience with call centre industry technology may be required, *backed by* two or three years of general experience.

Call centres are changing to include more services, improved access to customer databases, and integration with the Internet. *Multimedia call centres* are likely to grow, requiring workers to *adapt* their skills and knowledge to improved technologies.

LEARNING ACTIVITY #5

Match the vocabulary with the correct definition. Then choose three and give examples or use in a sentence.

a) number of calls you must make

b) checked

1. __ multitask

c) where you call if you encounter a problem with your computer

2. __ trouble-shoot

3. __ call quotas

d) use different software and technology

4. __ monitored

e) solve technical problems (e.g. computer)

5. __ technical help desk

LEARNING ACTIVITY #6

1. How many calls might a worker answer per day?

2. What two things are workers monitored for?

3. Name two positions a CSR can advance to.

LEARNING ACTIVITY #7

1. Have you ever felt trapped in a job? What did you do about it?

2. Have you had a personal experience dealing with job stress?

3. Has anyone ever monitored you before? How did it feel?

4. Have you ever had to multitask?

5. What kinds of databases have you worked with?

LEARNING ACTIVITY #8

1. __ drive-bys
2. __ side-by-side coaching
3. __ remote monitoring

A good call centre has effective coaching that helps the call centre worker. Match the three coaching terms to their definitions.

a) The supervisor or coach listens to calls from a location away from the rep's workstation.

b) The coach or supervisor overhears the rep's response to a customer while walking by.

c) The coach or supervisor sits beside the rep, usually listening in on a headset to both sides of the call.

Skill Requirements

Hiring the right person for the job is very important in the call centre industry. In many *instances*, the representative on the phone is the first contact the customer will have with the company. Call centre work is definitely a people business requiring good communications and customer skills as well as the right *disposition*, *personality* and *temperament*.

"We hire attitude and we teach products and skills. A lot of the ability to handle the call is through the systems, through effectively *managing the databases*."

The above quote shows the importance of starting off with the right type of person for call centre work. Once the person has been hired, it is the call centre's responsibility to *ensure* good training and ongoing *motivation of agents*.

Candidates for an *entry-level position* in telephone sales or customer services need to have the following skills:
☐ excellent speaking and listening skills
☐ a professional manner
☐ *persistence* and *tenacity*
☐ computer and keyboarding skills
☐ *bilingualism* is considered an asset
☐ can *multitask*
On a more practical level, call centre agents need to have:
☐ *tolerance* for stress
☐ the ability to work well under pressure
☐ the ability to sit for long periods with a computer and *headset*

Basic typing skills are required. However, as call centres change some of their focus from an oral/telephone service to a *Web-enabled service*, more demands will be placed on employees for writing skills and for c*omputer technical support*. With the general technology advances in the industry, there is a growing need for employees who can provide this technical support. E-mail service is growing rapidly and this is an area where written skills are more important than oral skills.

LEARNING ACTIVITY #9

Match the vocabulary with the correct definition.

1. __ can multitask
2. __ Web-enabled service
3. __ entry-level position
4. __ headset

a) starting job
b) can do more than one project at the same time
c) device on the head for listening with a microphone for speaking
d) service that uses the Internet

LEARNING ACTIVITY #10

As a group, brainstorm ways that you can relax, both at work and at home. Each person in the group should be prepared to talk briefly about one of these relaxation techniques eg yoga, in the next class.

LEARNING ACTIVITY #11

With your instructor, come up with some interview questions that you might be asked if you were going to work in a call centre. Then, role- play the interviews. This might be more appropriate at the end of the curriculum.

QUIZ:
How much do you know about call centres?

The following questions are about the call centre industry in Ontario.
Circle the letter beside the correct answer.

1. Inbound calls are:
   a) cheap
   b) calls going out of a call centre
   c) calls coming into a call centre

2. Telecommunications companies are:
   a) hospitals
   b) Sprint, Bell, AT&T
   c) hotels and/or travel agencies

3. Which job is **not** a call centre worker title:
   a) teller
   b) technical support clerk
   c) inquiries clerk

4. What kind of call centre worker takes orders over the telephone:
   a) help desk clerk
   b) telemarketing clerk
   c) order entry clerk

5. Recently, call centre workers are doing more work by:
   a) fax
   b) email
   c) telephone

6. Continuous monitoring means:
   a) the computer is never turned off
   b) an employee's work is always observed
   c) the computer desktop is always changing

7. For call centres, call volume means:
     a) the computer is turned off
     b) the loudness of the telephone's ring
     c) the amount of calls an employee deals with

8. A call "in queue" means:
     a) the call has been answered
     b) the call has been handled by a rep
     c) the call is being held in sequence

Name: _____

Date: _____   **Score:** _____

Module 2
Professionalism

Attitude

Service is an Attitude

We live in a world of immediate satisfaction – 24-hour banking, overnight delivery and access to the world by Internet.

For customers, this means they can get what they want, when they want it.

For you, the customer service representative (CSR), this means if you don't deliver, your competition will.

Service is an attitude as much as it is an occupation. Your goal is not just to provide customer service but to deliver customer satisfaction.

> Customers are not satisfied until <u>their</u> expectations are met or exceeded –
> not yours.

To provide good customer service you must do more than follow a script or master a few skills and techniques. You must have a sincere willingness to please people.

Great customer service makes you feel good.

You are a customer every day. You know when you're not getting great customer service.

LEARNING ACTIVITY #1

Think of a situation when you received customer service that was _excellent_ and write about it below.

_____

_____

_____

_____

_____

_____

What specifically did the person do to make this interaction memorable?

_____

_____

_____

_____

_____

_____

 Think of a situation in which you received customer service that was _poor_.

_____

_____

_____

_____

_____

_____

_____

What specifically did the person do to make this interaction memorable?

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Rate your next customer service experience, either in a store or dealing with a call centre on the phone. Think about the following:

- Was the agent or salesperson polite and helpful?
- Did you have to wait a long time to get service?
- Was the agent or salesperson knowledgeable?
- Did you get what you wanted?

If you did not get what you wanted, what was the problem? Were you satisfied with the quality of the service you received?

Positive Language

Your attitude is reflected not only in your voice but also in the words you speak. You can change your attitude by changing the way you speak. Using positive language shows your enthusiasm and sincerity and lets the customer know what you can do, not what you can't or won't do.

LEARNING ACTIVITY #2

Mark a (P) beside the words you think are positive and an (N) beside the words you feel are negative

__ Can   __ Will   __Don't   __ Happy   __Won't

__ Pleased __ Can't   __ Do   __ Not   __ Problem

LEARNING ACTIVITY #3

Look at the examples below and mark the statements you feel show a good attitude and use positive language.

1. _____ There is no way I can get that order out to you today. We close in ten minutes.

2. _____ I will record your order right away and it will be shipped out first thing tomorrow morning.

3. _____ We are temporary out of gizmos and can't get any in for at least two weeks.

4. _____ The gizmos are currently backordered. We can ship them out to you as soon as we receive them. We expect to receive the order in two weeks.

LEARNING ACTIVITY #4

Re-write these statements using positive language.

This jacket doesn't come in red – only black, blue and green.

_____

_____

_____

_____

_____

I can't process the order until you pay for it.

_____

_____

_____

_____

_____
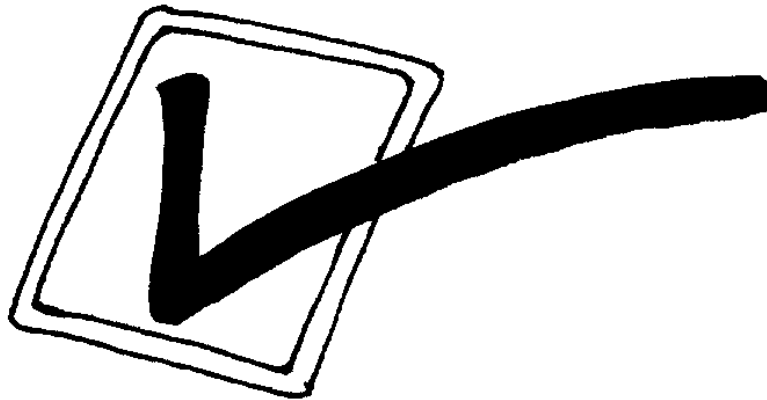
Honesty

Honesty is an important characteristic to have in every day life and even more so in the work environment. Employers are looking for someone who is honest, so they can trust them to get the job done properly.

LEARNING ACTIVITY #5

Read the following examples and then complete the exercise below.

- Ken is someone who steals time. He fools around at work or wastes time when he should be working.

Time Thief   Lies   Steals Product   Cheats People

- Jane is someone who lies to people. Some of the things she might lie about are: excuses for coming in late or leaving early or blaming others for something she did or didn't do.

Time Thief   Lies   Steals Product   Cheats People

- Tammy is someone who takes things from work. A person like this may take office supplies, uniforms, or even equipment.

Time Thief   Lies   Steals Product   Cheats People

- Billy is someone who cheats other people. Someone like Billy may increase the price of a product and keep the extra money for himself.

Time Thief   Lies   Steals Product   Cheats People

Read the stories below and circle the correct term for each scenario.

- Mike works every day from 9am to 5pm. On Friday his girlfriend asked him if he would go to a concert with her. The concert started at 4pm. Mike told his boss he had to leave work early for a Doctor's appointment.

Time Thief   Lies   Steals Product   Cheats People

- Gord is a cashier at restaurant. He calculates the bill for table 4 and it adds up to $15.00. Gord tells the couple at this table the bill is $18.00.

Time Thief   Lies   Steals Product   Cheats People

- Michelle works at a clothing store in the mall. Her boss is rarely ever there during the hours she works so Michelle spends most of her time on the phone to her friends.

Time Thief   Lies   Steals Product   Cheats People

- Janet works in a convenience store and has to cover the dinner break of the other employee. She gets hungry and takes a bag of chips and a chocolate bar for herself without paying.

Time Thief   Lies   Steals Product   Cheats People

Adapted from Life Skills – Attitudes on the job
Educational Design, Inc. © 1980

Willingness to Work

Employers are looking for people with a positive attitude and a willingness to do their job. Everyone has off days for one reason or another but in general, a willingness to work means you want to do well at your job and find things to keep you busy while you are there.

LEARNING ACTIVITY #6

Look at the following chart and rate yourself on your willingness to work by circling the numbers in each column.

Excellent	5	5	5	5	5	5	5
Good	4	4	4	4	4	4	4
Satisfactory	3	3	3	3	3	3	3
Needs Improvement	2	2	2	2	2	2	2
Danger of Being Fired	1	1	1	1	1	1	1
	Helps others	Does work willingly	Does assigned tasks	Willing to work extra hours	Doesn't miss work	Offers helpful ideas	Does extra work

Chart from Life Skills – attitudes on the job
Educational Design, Inc © 1980

Add up all the circled numbers. What is your total score? _____

How do you think you can improve your willingness to work?

_____

_____

_____

_____

_____

_____

Accepting Direction

All employees have to accept direction. It is part of the job. The boss is responsible for seeing that all the day to day tasks are accomplished. If the boss doesn't direct the employees, important things don't get done.

LEARNING ACTIVITY #7

How good are you at accepting direction? Circle the best answer for each problem.

Your boss never says much to you. You wish the boss would tell you if you are doing a good job. You should:

   A) Write the boss a note asking if you are doing a good job.

   B) Threaten to quit

   C) Ask the boss if you have been doing a good job.

   D) Do nothing. You might hear things you don't want to.

Why did you choose this answer?

_____

_____

_____

The call centre where you work has more than one boss. The floor manager tells you to sit with another representative to observe how they handle calls. Another boss comes out and tells you to start taking your own calls. You should:

   A) Do what the first boss tells you

   B) Do what the second boss tells you

   C) Tell the boss the floor manager asked you to observe the other representative. Ask which you should do.

   D) Do whichever you find more interesting.

Why did you choose this answer?

_____

_____

_____

The best way to accept direction is to smile, give a positive response and do what the boss asks right away.

LEARNING ACTIVITY #8

Read the following examples and then fill in the chart below.

1) The boss asked Jim to stack the boxes in the storeroom. Jim grumbled "why me," and went out for a smoke before going to the storeroom.

2) Sammy works at a call centre as a customer service representative. There were several other reps on and it was pretty slow. The boss asked Sammy if she would go around and make sure all the printers had lots of paper in them. Sammy smiled and said, "Sure." Then she went to the supply room to get the paper.

3) The boss asked Brenda to send out an email to all the employees reminding them of the meeting that afternoon. Brenda smiled and started the email.

4) Mike's boss asked him to take a file over to a different department. "Okay," Mike said, but frowned as he finished writing an email he had started to his friend.

	Smile	Give a positive response?	Do the job right away?
Did Jim . . .			
Did Sammy . . .			
Did Brenda . . .			
Did Mike . . .			

Chart adapted from Life Skills – attitudes on the job
Educational Design, Inc. © 1980

Appearance and Grooming

What makes a positive personality?

Appearance

There is a belief that your "outer you" reflects your "inner you". If you look untidy and sloppy, it is presumed that you will do untidy and sloppy work. This isn't necessarily true, but it is a common perception. Even in a Call Centre where you never see your customer, you are often judged on your appearance by those you work for and with.

Confidence

There are two kinds of confidence.

1.   The first and most common kind comes from **other people's views** and opinions of you. This is nice to have but not always dependable. If you get your confidence from your job, you may easily lose your confidence if you are suddenly fired or laid off.

2.   The second kind of confidence is much more important and that is the **confidence you have in yourself**. This confidence grows when you really try to achieve something, or when you lose something and grow through your loss. It also grows when you learn to trust your judgments and perceptions. When you learn to like and accept yourself, internal confidence grows.

Creativity

Creativity is the ability to think beyond the obvious to solve problems. Creative people think about problems and come up with new and exciting solutions. Creativity is a quality we all have but it must be practiced. Develop a creative approach to your work and life.

Determination

Determination is sticking to it. Do not give up. See things through to the end and use your creativity to overcome problems. If you don't succeed the first time, **START OVER**. By following things through, your self-confidence will grow.

Enthusiasm

The major quality that employers look for is enthusiasm. It is the greatest quality you have to sell. Enthusiasm is defined as:

- a zest for living

- interest in many things

- curiosity

- a high energy level at work and in life

Imagination

Use your imagination. Picture yourself in positive situations. Use your imagination to create the person you most want to be. Feed this image into your mind everyday and it will become true. You will be able to live your life as you "dream" it. You can use your imagination to build your confidence.

Communicating your best image

Preparing to be on stage, looking your best, creating good impressions- all are part of customer relations. Good grooming is so critical that many jobs require special uniforms to reach high standards of dress. This is true even in call centres where you never see the customer face to face.

A note on body odour...

It is a smelly subject, and it makes people uncomfortable to talk about it, but the last thing that you want to do is offend the people you work with by smelling like body odour!

Here's the deal...

1. You need to shower everyday. If you cannot shower or bathe, you need to wash.

2. You need to wash your hair at least every other day. Hair picks up odours as well. Greasy-looking hair is unappealing and unprofessional.

3. You need to use deodorant.

4. Wash your clothes as often as possible. It is okay to wear clothes more than once as long as they are still clean-looking and clean-smelling. When you sweat, your clothes absorb it. You need to choose something else to wear to work.

5. If you smoke, then you have a whole other range of "smell issues". Sorry, but it's the truth. Make sure you brush your teeth often. Chew a breath freshening gum.

Remaining positive

Many customer service people allow times of lag time between customers to turn into boredom. This often results in a negative attitude.

When a customer phones seeking service after one of these lag times, the employee is often not ready. Staying alert and positive to serve customers is a major challenge.

LEARNING ACTIVITY #9

Remaining positive on the job

Read the following statements. Fill in the missing word you think best fits.

1. Staying _____ is better for your attitude than being lazy.

2. One way to stay positive during inactive periods is to take the initiative and _____ work for yourself.

3. Above everything, keep your sense of _____.

4. Staying alert for _____is a challenge.

5. Talking about personal problems with a co-worker is a _____ way to stay positive.

6. It is okay to have _____ with co-workers if you remain alert for customers.

8. Negative attitudes chase _____ away.

9. The biggest loser when you are negative is _____.

Attendance

Rules for Attendance

- You should always come to work unless you have a good reason for being absent.

- If you have a good reason for being absent, you must give your employer enough time to find someone to replace you.

- When you call in, you must speak to the person in charge. If you give the message to someone else, and they forget to pass it along, it will be you who is responsible.

- When you speak to your boss or supervisor, make sure that you explain your reason for missing work. It should be communicated clearly and respectfully.

LEARNING ACTIVITY #10

Reasons why people miss work – good vs. poor

Below are reasons why people miss work. Your job is to decide whether the reasons are GOOD or POOR.

I called in and said:	Good Reason	Poor Reason
I was in a car accident last night		
I am sick in bed with the flu		
My child is sick in bed with the flu		
I have no way to get to work		
I have to go to the Doctor's today		
I was up late last night and need to sleep		
There was a death in my family		
My friend is here from out west		

When should you inform the boss?

There are two types of reasons for missing work:

- Emergencies

- Special Occasions

In either case, you should give your employer as much notice as you possibly can.

Emergencies: Call as soon as you find out you will have to miss work. You can often give the boss three or four hours notice, and that should be enough time to find someone else to take your place.

Special Occasions: You almost always know about these well in advance. The boss expects you to give notice of these absences before he or she makes up the schedule. This is usually one or two weeks ahead of time, but check to see if your workplace policy is different.

LEARNING ACTIVITY # 11

Reasons why people miss work

The following are reasons why people miss work. Check the boxes to indicate when they should tell the boss, ASAP (as soon as possible) or within 1-2 weeks.

Reasons	ASAP	1-2 Weeks
We are going on vacation		
My son was just taken to the hospital		
I have a Dentist appointment		
My cousin is getting married		
I broke my arm		
I am sick in bed with the flu		
There was a death in the family		
I have to help my friend move		

Did you give enough notice?

If you don't inform your employer when you are going to be absent, you will probably get fired. Giving notice is professional and will help you keep your job.

LEARNING ACTIVITY #12

Read the following stories and decide whether the boss was given enough notice.

1. Ken is scheduled to work at 8 am on Tuesday. He tells his boss on Monday that he can't come in Tuesday because he has a dentist appointment.

Did he give enough notice? _____
If not, what should he have done?

_____

2. Sara's daughter was hurt and taken to the hospital at 1:30 pm on Friday. Sara was supposed to work at 4:00 pm. She called her employer at 1:45 pm and explained why she couldn't come in that day.

Did she give enough notice? _____
If not, what should she have done?

_____

3. John's grandfather died on Tuesday. The funeral was on Friday. John called his boss Friday morning to tell him he wouldn't be in.

Did he give enough notice? _____
If not, what should he have done?

_____

4. Steve asked Geri to go out this Saturday night. "I am scheduled to work this Saturday, how about a week from Saturday?" Geri

asked. Steve agreed so Geri asked her employer for next Saturday off.

Did she give enough notice? _____
If not, what should she have done?
_____

Working as a team

Teamwork

If you have ever played organized sports, you know the great feeling of satisfaction that comes from being a team member. A **group harmony** develops when people who work closely together share a victory or achieve a common goal.

In the customer service field, you will get plenty of opportunity to show that you are a **team player**. Doing your share of the work, and helping others is all part of being on the team. The more successful you and your co-workers are at making a team effort, the more satisfied the customers are going to be. It is hard to do it all by yourself.

Call centres are usually organized into teams of 10-15 people. Working as part of a team is important because call centre reps must work together to manage the calls in their queue. There are many ways in which the actions of one team member can affect the job of the others.

- If one rep is out of queue unnecessarily, the others have to manage more calls.

- If one rep doesn't handle a customer well and that customer calls back, another rep may have to take the call.

- If one rep is speaking too loudly or sounds upset, the others on the team have to concentrate harder to deal with customers.

Asking for help

Asking for help is not admitting that you cannot do your job. There is always a learning curve when you start somewhere new. If you do not know the answer, it is always better to ask for help than give the customer false information. Businesses are more productive and a nicer place to work when the employees work together as a team.

LEARNING ACTIVITY #13

Eliminating Bossy words

Below are aggressive ways of asking for help on the job. Rewrite each sentence in a way that is *not* aggressive.

    1. Get me some paper for my printer.

        _____

    2. You're in my way.

        _____

    3. I can't hear. Shut up.

        _____

    4. Hey you, answer that phone.

        _____

Accepting criticism

Criticism does not have to be a bad thing. It can be a suggestion for improvement. In a Call Centre you are always looking for ways to improve.

If you have to punch a time card every day and you keep forgetting to punch out, what would happen if your boss didn't criticize you? You might not get the pay you deserve.

If your boss suggests that you come up with a way to help you remember to punch out, he has provided you with constructive criticism and you will probably have an easier time remembering.

Some workers have a difficult time accepting criticism. They might:

- Blame someone else – "It's John's fault."

- Argue that it's not their fault – "I didn't do anything wrong."

- Make excuses – "If these stupid computers were faster, I would get the call done faster."

- Complain about being picked on – "You always get mad at me."

- Pout – Don't talk at all.

If you do any of these things at work then you need to stop and think of better ways of handling criticism.

LEARNING ACTIVITY #13

With your instructor and group, brainstorm and role play some scenarios where a person has to accept criticism. The person can respond appropriately or inappropriately. The other group members will point out what was good and not good.

LEARNING ACTIVITY #14

How to accept criticism

Read each situation. Using the list, write how the worker acted when criticized.

- Blame someone else

- Argue that it was not his or her fault

- Make excuses

- Pout

- Complain about being picked on

Jane said "I would have swept the floor last night but I couldn't find a broom."

Jane's reaction: _____

Tom did not come to work Saturday. He told the boss that Sherry was supposed to phone him with his schedule but she never called.

Tom's reaction: _____

A co-worker said to Sam, "When you were late today, I had to do your job and mine too." Sam said, "Why does everyone pick on me?"

Sam's reaction: _____

Casey's boss told him that he wrote down the wrong phone number for a client. Casey said, "I wrote down just what the person said. I know I wrote it down right."

Casey's reaction: _____

Kim's boss told her to be friendlier with the customers. Kim went into the back room and sat by herself.

Kim's reaction: _____

Below are some good ways to accept criticism. Write the name of the person from each story beside the answer he or she should have given.

"Thanks for telling me. I'll listen more carefully next time."

_____

"It's hard for me to talk to strangers, but I will try harder."

_____

"I should have checked my schedule myself. I'll do it this week."

_____

"I'm sorry about that. I'll make sure it doesn't happen again."

_____

"You're right. I guess I didn't look for that broom very hard,"

_____

Module 3
Customer Service

from: **Customer Service . . . it's more than just "Thank You, come again!"**
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Customer Service

Why Do You Need Customer Service Skills?

> **BECAUSE YOUR BUSINESS IS PEOPLE**

If the people don't come to your business then you will not have a job. You want people to come back...and bring their friends! To achieve this, you have to be a customer service professional.

So, what is a customer service professional?

Customer a person who buys goods or services from a shop or business*

Service work, or the doing of work, for the community*

Professional belonging to, or connected with a profession, 2 a- skillful, competent, b- worthy of a professional (professional conduct)*

*The Oxford Dictionary of Current English, 2nd edition, 1993

LEARNING ACTIVITY #1

In your opinion

Please answer the following questions in complete sentences and check your spelling and grammar.

1.   What is customer service?

_____

_____

_____

_____

2.   What are some words you think of when you hear the words customer service?

_____

_____

_____

_____

3.   What are some words you think of when you hear bad customer service?

_____

_____

_____

_____

4.   Why do you think customer service skills are so important in today's job market?

_____

_____

_____

_____

_____

# Customer Service is like a game of baseball...

1.   It is possible to do everything right and still not win.
2.   Your batting average will increase if you cover all your bases.
3.   When customers return because they have been treated right,

YOU SCORE!

Bases

1st base   send a positive attitude to others

2nd base   identify the needs of your customers

3rd base   provide for your customers needs

Home Plate - *the customers return!*

Second
Base

Identify the
needs of your
customers

Third
Base

First
Base

Provide for your
customers' needs

Send a positive
attitude to others

The customer
returns

Home Base
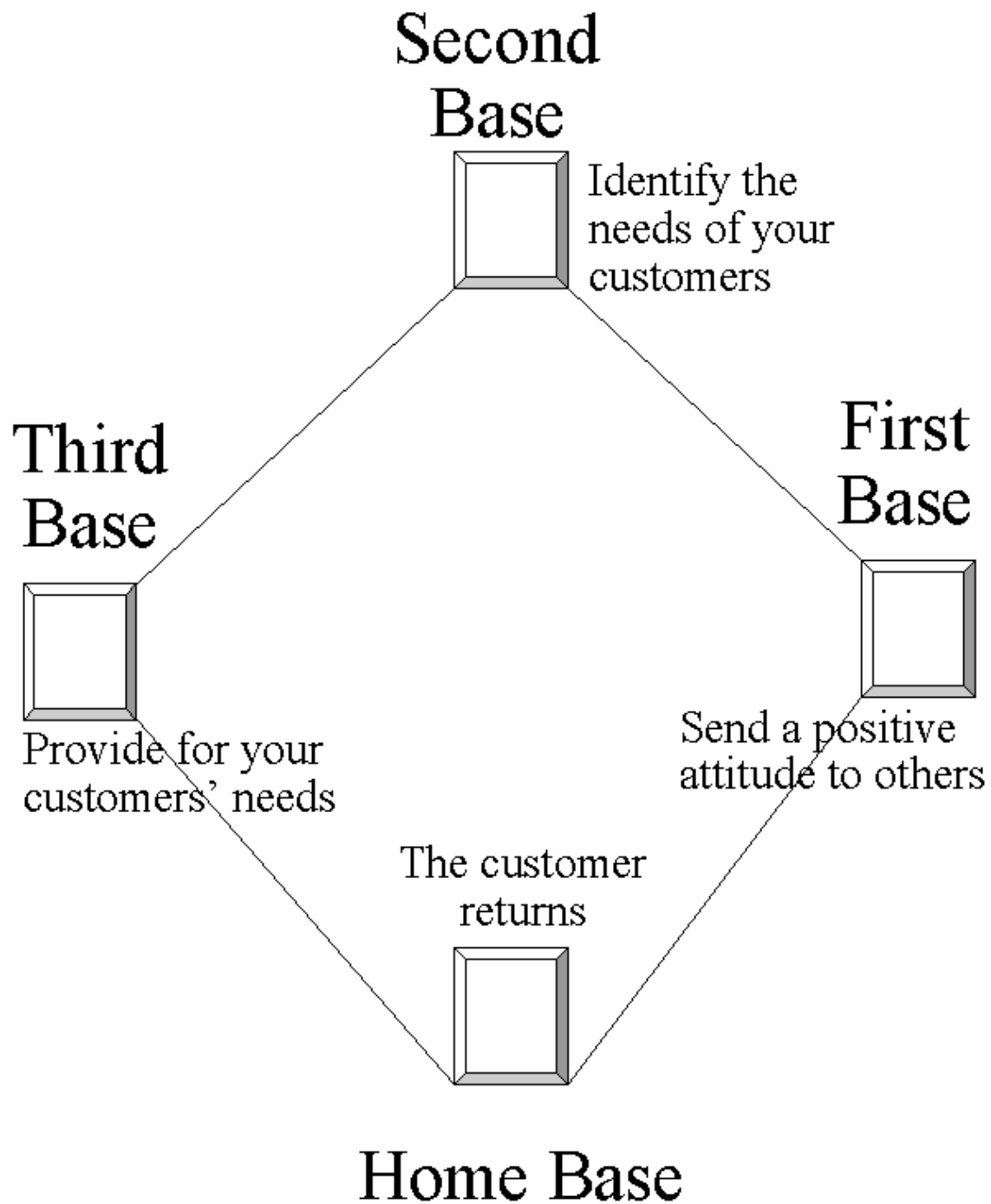
To be a Customer Service Professional you should:

- have a positive attitude

- display a cheerful outlook

- enjoy working <u>with</u> people

- enjoy working <u>for</u> people

- have a high energy level

- display flexibility

- enjoy new experiences

- be sensitive

- communicate clearly and concisely with the customer

- view your job as important

- make the customer feel like #1

LEARNING ACTIVITY #2

Discuss this list as a group. Is there anything you would add to the list?

_____

_____

_____

_____

_____

What can success in customer relations do for you?

_____

_____

_____

_____

LEARNING ACTIVITY #3

What can success in customer relations do for you?

In addition to the money you will make, success in customer relations can do many personal things to help you.

There are three false statements below. Place an X on the line beside the 3 false statements.

_____ 1. Dealing with customers can be made into something more enjoyable than a routine factory job.

_____ 2. If you try hard, your first customer relations job will bring out the best in your personality.

_____ 3. If you do not train yourself to enjoy customer service work, you will never be good at it.

_____ 4. Few executives start out in customer service jobs.

_____ 5. Those who quickly become good at customer relations stay at their jobs longer and earn promotions.

_____ 6. Becoming good at customer service now will help you succeed in any job you may have in the future.

_____ 7. In your first customer service job, what you **learn** can be as important as what you **earn**.

_____ 8. Customer relations work is less demanding than other jobs.

_____ 9. You meet fewer members of the opposite sex in most customer relations jobs.

_____ 10. A smile uses fewer muscles than a frown.

The Psychology behind good customer relations

Here are some secrets for creating good relationships with customers even over the phone.

You get back the kind of behaviour you send out.

- When you send out a friendly signal to others, chances are good they will respond with a friendly gesture of their own.

- The more friendly signals you transmit, (happy voice, upbeat attitude) the more customers will like you.

- The more that customers like you, the easier they are to deal with. It all starts with you.

You never get a second chance to make a first impression.

- Unfortunately negative first impressions are hard to overcome, even harder when you can only help the person over the phone.

- Those who are good at customer relations are constantly alert to tone and voice control as well as the actual words being spoken.

- Make sure your first impression does not require a difficult repair job at a later date.

Customer relations experts are made not born.

- Everyone has enough potential to be good at customer relations.
- All it takes is:
    - a desire to serve
    - training
- Stick with it and you will learn to excel.

You have the right stuff.

- There is no such thing as a set of specific personality traits necessary to make you outstanding at customer service.

- Everyone can:
    - smile
    - be polite have a good service attitude

- Your special mix of personality traits, no matter what they are, is all that you need. Learn to use the "stuff" you already possess.

It is natural for everyone to feel inadequate at times.

- An *inferiority complex* is the feeling that you are not as good as other people. You believe that other people are better than you.

- When you start to lose confidence remind yourself that you look better to others than you think.

- Do something to improve your visual image. Get a new hair style or buy a new tie. This works to improve your self confidence and even improves you phone mannerisms.

Select a good role model.

- Once you have made the adjustment to your new job, find a co-worker who is outstanding at customer service.

- Model some of your actions after this individual.

- You might even ask this person to help you.

Make the most of your personality differences.

- Customers will probably react in a positive manner to any unique differences that you possess.

- Your customers may see what you believe is a disadvantage as an advantage. Customers and your boss want you to be yourself.

<u>Good Customer Relations = Good Business</u>

The four basic needs

A customer needs to:

- Be understood

- Feel important

- Feel comfortable

- Feel welcome

Three types of customer service

You have all been customers in your lifetime. You know when you are getting good service and when you are getting terrible service. There are three types of customer service. They include:

Type I - Rude

The first type of customer service is **rude.** You know when you are getting rude service. This is when the server treats you like you are an inconvenience to them. If they make a mistake they accuse you of causing it. If you ask a question they look at you as if to say "how dare you disturb me". They are the ones lounging on the counter talking to their friends or on the phone and ignoring you.

Your goal is to <u>never slip into **rude** service</u> no matter how difficult the customer is or how bad a day you are having.

> <u>Rude</u> service will lead to the customer
> taking their business elsewhere

Type II - Indifferent (they don't care)

The second type of customer service is **indifferent.** This is when the server greets you with a half-hearted smile, is very vague and never goes out of their way to help you. You will get what you asked for, with probably little help or assistance. You might get pointed in the right direction.

Indifference may be accepted the first time a customer comes into your store, but with continued indifference you can guarantee they won't come back.

> It is the extra things that attract
> customers and employees

Type III - Hospitable

The third type of customer service is **hospitable.** This is your goal as a customer service professional. A server who is in the **hospitable** mode is the one who greets you with an enthusiastic smile and a pleasant greeting. This server goes out of his/her way to ensure that you are happy. This could include helping you out to the car with your packages, getting a booster seat for your child, giving a balloon to your restless child, or helping you find the item you need by leading you to the department it is in and showing you exactly where it is.

This type of service is what it takes to get customers to return. They will also return with friends. You have to be the best you can be. It is the little things and the pleasant attitude that bring the customers back.

> If the customers come back, you are
> securing future employment

Call Centres are different from the typical retail setting where a customer comes into the store and you relate to them face to face. It is harder to judge what kind of service you are getting over the phone because you cannot see what the other person is doing. Most of the signs we pick up on are from body language. When you are dealing with people over the phone, you cannot rely on these signs to determine if you are being treated fairly. The only thing you have to go by is voice and what is being said. As a customer service representative you must make every effort to sound hospitable and pleasant.

LEARNING ACTIVITY #4

Remember to use complete sentences and check for spelling and grammar.

1. What are the three types of customer service? Describe how it feels when you are a customer and experience each type of service.

   a)_____
   _____
   _____
   _____
   _____
   _____
   _____

   b)_____
   _____
   _____
   _____
   _____
   _____
   _____

   c)_____
   _____
   _____
   _____
   _____
   _____
   _____

Know your product

If you work in an Outbound Call Centre, your job is to call customers and sell them a product or service. This type of position tends to be the most difficult for people because they have to think fast and sell a product or service to someone who isn't always looking to buy.

The most important aspect of outbound sales is:

> ## Know your product

If you know what you have and what it does it makes your job so much easier.

Every product has features . . . the characteristics or parts
This leads to the benefits . . . what is in it for me.

Example:
What - An answering machine has digital recording
So What – you don't have to worry about buying new tapes

> ## Customers buy the benefits – not the features

LEARNING ACTIVITY #5

The following is a list of features and benefits for a computer
Put an (F) beside the feature and a (B) beside the benefit

____ 12 gigabyte hard drive	____ can make new music CD's
____ can connect printers or cameras	____ 17" monitor
____ CD burner	____ can store lots of documents
____ less strain on the eyes	____ 4 USB ports

Determining the needs of your customer

Finding out what the customer's needs are and fulfilling those needs is very important. Asking open ended questions to your customer will help you find out what they are looking for.

Who?	How?	Which?
What?	Where?	When?

Sales

Ask the customer what they are looking for or what they need with the following types of questions:

- Who is using the item?

- Which brand names do they trust? (not applicable if you only sell one)

- How do they plan to use it?

- Where do they plan to use it?

In the short time that you communicate with the person on the other end of the phone line, you must determine what their needs and desires are or any problems that they face then use this information to sell your product or service. For example:

A question you might ask – *"What are you looking for in a delivery service?"*

The answer – *"We need someone who is reliable and trustworthy and can deliver within 24 hours."*

Your reply would then be to focus on these points with your company. Use examples of your delivery times and the screening process your drivers go through.

"ABC Delivery Service prides itself on the extensive screening process our drivers go through. They are monitored and assessed monthly, and we have a no tolerance policy for unreliable service. With our new fleet of vans and transports we can guarantee your packages arrive on time or you will get your money back."

Support

To determine what type of support the customer needs you must first ask open ended questions. For example:

- Tell me about the problem (What)

- How often does it do it?

- When does it do it?

LEARNING ACTIVITY #6

Mike is working in a technical support department and Joe calls in. Work through the problem with him using open ended questions such as what, where, when and how.

Mike: "Good morning, you have reached Support Service, this is Mike. How may I help you?"

Joe: "Good morning Mike. My name is Joe and I am having a problem with my internet connection."

What should Mike ask next? Remember to use positive language.

Mike:
_____
_____
_____

What other questions should Mike ask Joe to help him with the issue?

How:
_____
_____

When:
_____
_____

Where:
_____
_____

LEARNING ACTIVITY #7

In pairs, your instructor will provide both of you with a map that has a grid. One of the partners will draw features on the map eg roads, cities, rivers etc. Then, the person who has drawn the features on the map will explain to his or her partner where the features are. The partner must try to draw the map in the same way. The second person may ask questions for clarification.

LEARNING ACTIVITY #8

Using the newspaper, Internet, catalogues etc, research promises made by different companies eg lowest prices, money back guarantees, same-day delivery etc. Report back to the class.

The Upset Customer

A customer could be upset because he or she

- has expectations that have not been met.

- is already upset at someone or something else.

- is tired, stressed, or frustrated.

- feels like a victim - not much power in one's life.

- feels no one will listen if he or she does not yell.

- feels you or someone at your business promised something that was not delivered.

- feels you or someone in you business was rude, indifferent, or impolite.

- is told one thing by one staff and something else by another.

- feels he or she is not being heard.

- holds prejudices (for example does not like your hair, clothes, makeup, etc.).

- is making a wrong assumption about what your business provides.

- is told he or she has no right to be angry.

- is given a smart or flippant reply.

- is screened on the telephone.

- is embarrassed by doing something incorrectly.

- feels his or her integrity or honesty has been questioned.

- Feels someone in your business has argued with him or her

The upset customer wants...

To be taken seriously

The customer does not want a response like, "You're kidding!", "No way", or "You have to be joking!" The customer wants you to be professional and confident and to respond seriously to concerns.

To be treated with respect

The upset person doesn't want to be looked down upon. One does not want to feel that you think you are a better person. This person wants to be treated (and any concerns) with respect. This may be difficult when the customer is clearly at fault but is trying to blame your organization.

Immediate action

The customer doesn't want you to look into it next month, next week, or even tomorrow. The customer wants you to do something now. Show you are concerned by moving briskly, no matter how tired you are.

Compensation

The upset customer wants someone to pay for the damage done, and perhaps the time lost, inconvenience, or pain suffered.

Someone to be reprimanded or punished

Assure the customer that corrective action will be taken, even if you are not the supervisor. Discreetly report the incident to the supervisor so that the problem can be explained to your co-workers and avoid similar problems in the future.

To clear up the problem so it never happens again

Sometimes the customer just wants to know that some action has been put in motion so that no one will have this problem again. Assure the customer you will report the problem to the person who can take care of it.

To be listened to

What an upset customer wants first is to be listened to. It is difficult to listen carefully in tense situations.

Angry customers

If your work requires that you deal with people, you will undoubtedly run across angry or hostile customers. This is never an easy situation to deal with, but by following a few simple guidelines, you can make the situation as productive as possible.

Prepare yourself to be sworn at, made fun of, intimidated, threatened, and harassed. Unfortunately, it seems to go with the territory. Customers come in all shapes, sizes, **and** with various temperaments.

It is not a good idea to respond to a customer's attitude with similar behaviour. This will only serve to "fuel the flame".

HOWEVER...

- You do need to deal with these angry customers

- In order to deal most effectively with them, it is important to know why the customers are behaving the way they are.

Why do people react this way?

The reasons why people get angry at a business are varied, but mostly it is because they feel that they have not received what they feel is rightfully theirs:

- the best price

- quality items

- good service

- fast service

- attention from staff

This would make a lot of people angry; however, most people react differently. Sure, we may get angry, and verbally let the person know we are angry and dissatisfied with the service we have received, or the product that we have purchased. Other customers may choose to never shop in that particular store again, thereby avoiding the situation altogether. And still others choose to react violently and abusively. For each of these people, there is a story about why they are so angry. Sometimes, they have learned that when they rant and rave, they get what they want.

Most of the world does not react this way...but the ones who do really make it rough for everyone involved.

Remember that you, as a customer service professional, cannot make this person see that how they are responding is inappropriate. Your job is to try to calm them down, and if not, then to keep yourself and the other customers safe.

To defuse a customer's anger

- respond slowly

- help the customer feel that he or she has a choice

- do not get angry

- recognize that all customers are individuals, not just another sale

- put yourself in the customer's situation

How to deal with an angry customer

Don't get angry

You need to stay in control of your emotions. Your anger will only escalate the situation, and make the customer more angry. It is hard when you feel that you are being attacked, but if the situation is to be resolved, you need to stay in a frame of mind where this can happen.

- breathe deeply and slowly

- stay cool

Anger is an emotion we all have

Remember that anger is one of the many emotions that we feel. We have the right to feel angry. Allow the customer the opportunity to vent. When the customer feels like someone has listened to the problem, he or she is more likely to participate in a solution.

Why is the customer angry?

Usually when a customer is angry, it is because of feeling unappreciated and helpless. It is a defense mechanism that is activated when we feel attacked or wronged. It is your job to find out why the customer is so angry.

The source of the anger

Although the angry customer is directing the anger at you, it is not personal. It usually has nothing to do with you, as a person, but rather, you as an employee of the business, that they have a problem with. You represent the whole organization and are immediately available to the customer.

Anger vs. Aggression

If the customer becomes aggressive, then back away from the situation. Aggression crosses the line from an expression of anger to an intent to intimidate, hurt someone, or damage something.

Stay focused on solving the problem

The angry customer is unable to stay focused on finding a solution; the customer is venting. It is your job to stay focused. Keep trying to find an acceptable solution: a decision to be made or an action that needs to be taken.

Let the customer know that you understand what the situation is

Listen to the customer and then present the situation as you hear it.

"You are angry because the toaster you bought last week is broken, and you feel that it should be replaced. Is that the situation as you see it, Mr. Jones?" This helps the customer re-focus on the situation and may begin to calm down.

Praise yourself for handling the situation.

Give yourself a pat on the back for having handled a difficult situation appropriately.

Seek help when necessary

Don't be afraid of calling in co-workers to help handle the situation; sometimes just having someone within listening distance is helpful. Unfortunately, angry customers are an everyday part of dealing with people. Don't take it personally. Just deal with them the best you can; try and help them resolve the problem. Most important of all, remember that you can not make *every* customer happy.

LEARNING ACTIVITY #9

Remember to write in complete sentences and check for correct spelling and grammar.

1. What are three reasons why a customer may be upset?

   _____
   _____
   _____
   _____

2. What are five things that the upset customer may want?

   _____
   _____
   _____
   _____
   _____

3. Should a customer service professional respond to a customer's upset or negative attitude with similar behaviour? Explain.

   _____
   _____
   _____
   _____
   _____

4. What are five ways to diffuse a customer's anger?

   _____
   _____
   _____

5. When should you seek help from a co-worker? Describe a situation when you would.

   _____
   _____
   _____
   _____
   _____

Words that make a difference

The words you use with customers can either help communication along or block it. The following are examples of statements that will either "block" communication with your customer or "help" the communication.

Use Impersonal Statements	
Communication Blocker	_Communication Helper_
You didn't do this right.	There are a few areas on this form that we need to complete.
If the customer did something wrong, point out the mistake indirectly. He/she will often be embarrassed by the mistake. The customer may get angry because of this mistake and try and blame you. Avoid statements that are sarcastic, blaming, or condescending. Even if the customer is wrong, the time to make it known is not when he/she is angry.	

Use "I" instead of "YOU"	
Communication Blocker	_Communication Helper_
You're wrong.	I can see that there has been a misunderstanding.
You're confusing me.	I'm confused.
Don't blame the customer. When explaining what went wrong, use an indirect approach or "I" statements as much as possible.	

Avoid Giving Orders	
Communication Blocker	*Communication Helper*
You have to...	Will you...please?
Wait here.	Would you mind waiting here while I speak to my supervisor?
People like to be given a choice. Ask the customer pleasantly to do something and explain how it will be to their benefit. People don't like to be given orders.	

Take Responsibility	
Communication Blocker	*Communication Helper*
I can't...	I don't have the authority. However, Mary should be able to help you. Let me get her.
It's not my job.	Let me see what I can do to help. John is the specialist in that area let me get him for you.
Tell the customer what you can do together, not what can't be done. If you cannot help, connect the customer with someone who can. Even if the customer's needs are not within your job duties, never tell them that. Tell them how you can help.	

Avoid Causing Defensiveness

Communication Blocker	*Communication Helper*
You never do it right.	This is often completed incorrectly.
You're always late.	This payment is often late.
"Always" and "never" sound critical and uncompromising. Use "often" instead.	

Communication Blocker	*Communication Helper*
You filled this out but...	You filled this out well, and...
People don't listen to what you say before the "but"; they concentrate on what follows. Use "and" instead, so they will listen to the whole sentence.	

Communication Blocker	*Communication Helper*
What is your problem?	Please tell me what happened.

Communication Blocker	*Communication Helper*
It will cost you...	The rate is...
"Cost" sounds negative. It can imply time, aggravation, and other things in addition to money.	
People don't like to have problems. They also don't like others to know they have problems.	

7 steps to handling a difficult customer

Remain calm

Do not react with anger or tears. If you are getting to this point, excuse yourself and take this time to calm down. When excusing yourself, do it in a way that shows your interest in serving the customer.

- "Excuse me a moment while I check the policy on this."

- "I would like to get my supervisor's opinion on this."

- "I need to verify some information in the file."

Allow the customer to express his/her concern

Until a customer has had a chance to express her concern, there is no point in interrupting. She won't hear you anyway. Let her express her concern and listen for key points. Keep eye contact with the customer.

Show you understand

Acknowledge the customer's emotions.

- "I understand that you are angry, I would be too."

Restate the problem

After the customer has described their concerns, restate the problem. It could be that you have interpreted the situation quite differently from the customer.

Find agreement - get on their side

"Yes, I can see where the problem is. Let's see if we can fix it."

Gently confront

Say the person's name at the beginning of your sentence. Most people listen when they hear their own names. Ask them nicely to let you help them.

Transfer or delay the customer

Sometimes you can't do anything to calm a customer down. If this is the case, pass him over to another employee or your supervisor. Be sure to provide all the details. Often all it takes is a fresh face saying the same things you have already stated.

When customers are showing impatience

When a customer begins to show impatience you should:

- Remain cool and efficient

- Pick up your speed

- Smile more and say less

- Thank them for waiting

LEARNING ACTIVITY #10

Role play an angry customer calling a call centre. Practice staying calm and try to defuse the situation. Play both roles. Evaluate how your classmates did and offer them constructive criticism. Some possible scenarios include:

- The customer feels that he or she has been getting the "run around". They feel as though they have been switched from one agent to another.

- The customer is calling for the third time and the problem with their computer still hasn't been rectified.

- The customer feels that the call centre agent is curt and indifferent.

- The customer is put on hold for long periods two times.

LEARNING ACTIVITY #11

1. Listed below are ten ways to react to a difficult customer (someone who is over demanding, drunk, hostile, or extremely hard to deal with in some way).

Only three are <u>*acceptable forms of behaviour*</u>. Place a mark in the box of the lines you think are acceptable. Share your answers with the group and discuss them.

When faced with a difficult customer you should …

- ☐ Show a slight amount of disgust on your face so that the customer will know you consider him or her a problem.

- ☐ Smile, be polite, but put the customer down with a slight challenge in your eyes.

- ☐ Stay cool and be patient; let the customer talk away his or her anger.

- ☐ Consider the customer in an objective manner: refuse to take anything that happens personally.

- ☐ Walk away.

- ☐ Become distant and less cooperative yourself.

- ☐ Disarm the customer by asking: "Are you trying to give me a problem?"

- ☐ Start to whistle.

- ☐ Give back the kind of behaviour you receive.

- ☐ Immediately put a pleasant smile on your face and say to yourself: "I will show everyone I can handle this."

2. Why did you mark those three? Explain why you believe these are examples of appropriate ways to behave with a difficult customer.

_____

_____

_____

_____

_____

Module 4
Telephone Skills

The Art of Listening

What makes a good listener?

Some people are good listeners and some are not. Most people are somewhere in between because each situation is different. If the topic of discussion interests you, you might make more effort to listen and understand the speaker. If you find the topic of little interest, your mind may wander, and you start thinking about what to make for dinner instead of listening to what is being said.

Listening and paying attention are even harder to do when you're dealing with telephone conversations. There is a greater chance of distraction because you are not face to face with the customer.

So what can you do to help yourself focus?

These are some simple steps to help ensure you are giving your customer your complete attention.

1. Do not have any unnecessary papers on your desk. You might be tempted to read them instead of listen to the customer.
2. Make sure you have a quiet workspace so you are not distracted by the other staff members
3. Use a comfortable headset with appropriate volume so you can hear the customer.
4. If there is a bad connection, get the customer to phone back from a different phone or promptly call them back.

Telephone Etiquette

When a customer calls, your voice represents the whole business. To the caller, YOU ARE THE BUSINESS! How you handle the call can win him/her over for life, or send him/her in search of another company. The caller needs you to be:

EFFECTIVE and EFFICIENT

Find out how to best help the caller in the fastest way possible. The caller and his/her needs are your job; he/she is not an interruption.

First Impressions are Lasting Impressions

When you meet someone for the first time, you leave an impression – good or bad. When you meet someone on the phone for the first time, you also leave an impression. The impression also reflects the company you are representing. The person to whom you are speaking cannot see your facial expressions or read your body language. They rely on what they hear to form an impression about you and your company. Your tone of voice, manners, word usage, and speech patterns all play a role in helping the caller form an opinion of you.

You will want to:

- Be courteous and pleasant
- Use an appropriate volume
- Don't talk too fast
- Pause when giving information

- Sound interested
- Emphasize appropriate words
- Speak in a calm voice
- Keep your pitch low

Be Courteous and Pleasant

This seems that it should almost go without saying, but be sure that you are being courteous and pleasant. Listen to your voice as you are speaking. Do you sound friendly? Try smiling when you answer the telephone.

"A smile on your face *is a smile in your* voice*!"*

Just because they can't see your smile, doesn't mean they can't hear it!

Use an Appropriate Volume

Almost everyone can recall a time when they have spoken to someone on the phone and actually had to pull the receiver away from their ear to avoid a painfully loud caller's voice. Sometimes people across the room can hear the conversation word for word! This is something to remember when using the phone. Speak at a normal volume, in a clear voice. If you suspect that the caller may not be able to hear you, ask if they would like you to speak a little louder.

"Would you like me to speak up a bit Mr. Jones?"

Keep in mind the type of phone that is being used. Cell phones and cordless phones sometimes have poor reception.

Use a Moderate Rate of Speed

Since using the phone is a regular part of your day, you may find that you are repeating the same information several times. It almost becomes second nature, and you can do it without really thinking about it. The problem with this is that we tend to speed up when we are reeling off information that we know so well. We must remember that even if this is the tenth caller today who has asked the store hours of operation, it is the first time the caller is hearing it.

"Weareopenfrom9to5everyweekdayand9to9onSaturdays."
is not helpful or sending a positive image of your company.

Nervousness can also lead to speaking quickly. Some people get nervous and rush through the phone call to get it over with faster. They don't like talking to strangers. To help relieve this, take a deep, calming breath before answering the phone, and then at a moderate rate of speed (normal to slow), take the call.
If you are in the middle of a conversation and you realize that you have been speaking quite quickly, ask the caller if s/he needs any of the information repeated or clarified, or if s/he has any questions. Then repeat the information more slowly.

Practice this with a friend or co-worker. Often we cannot judge our own rate of speech. You want to speak slowly enough so that a caller understands you, but not so slow that it makes it hard to listen to.

Pause When Giving Information

If you are giving information that a caller may want to write down, pause after each section. You may want to suggest that you will be giving a number/address/catalogue number/name and the caller may want to get a pen and paper.

"I have the number you need Mr. Smith. If you would like, I could wait while you get a pen and paper and write to the information down."

"The name of the person you need to call is Joan Kettle. (pause) K-E-T-T-L-E. (pause) Her number is (short pause) area code 489 (pause) 3-5-6 (pause) 3-7-4-2"

Sound Interested

The caller will hear disinterest in your voice. Let the caller know that s/he and his/her situation are your first priority.

Watch the inflection in your voice.

Inflection: Letting your voice raise and fall naturally

When you ask a question, your voice raises at the end.

"Would you like me to gift wrap that for you?"

Some people have learned a particular speech pattern where their inflection raises at the end of every sentence. A lot of people find this particular speech pattern difficult to listen to. If you have this pattern, you may want to practice speaking without it. With concentrated effort, you can learn a new speech pattern.

Emphasize Words

Choose important words or phrases to emphasize.

"This particular *model is very* economical. *It has a built in feature that* measures *and* records *the water levels needed. It also has a* memory sensor *that will allow it to repeat these water levels. This* saves you *both* time *and* money. *This feature is* only available *in this model.* No other company *has this new technology."*

Speak in a Calm Voice

REMAIN CALM! No matter what the situation. If you become upset or anxious and it shows in your voice, no one will be able to understand you, and you will lose the confidence of those around you.

Keep Your Pitch Low

If you speak in a high pitched voice, you may want to make a concentrated effort to speak in a lower pitch, as this carries much better over the telephone.

Some Other Tips

The words you use when talking to customers is very important. They form an impression of you based on how you talk. Here are some phrases you can use and some rules you can follow when talking on the phone:

When speaking to someone, say:
* May I please speak to John?
* I would like to speak to John Jones.

Don't say:
* Is John there?
* Can I speak to John?

When the person you call is not in, say:
* May I leave a message
* I would like to leave a message
* Would you please tell him that Susan called? Thank you. Goodbye.

Don't say:
* Where is she?
* Tell him Susan called
* OK (and hang up)
* Bye (and hang up)

While you are on the phone, do:
* Pay attention to the call and listen
* Make the conversation short, if you can

Don't:
  • Talk to someone in the room with you
  • Ask the person to hold on for a long time
  • Keep talking to people after they say they have to hang up
  • Chew gum or eat
  • Suddenly say, "I have to go-bye", and hang up (unless it's an emergency)

LEARNING ACTIVITY #1

How does your telephone voice rate?

Find a partner. Take turns reading the following paragraph. Assess yourself, and your partner, as you read. Use the guidelines below.

As you are assessing yourself and your partner, remember that your objectivity and honesty will help you and your partner gain a better understanding of what your voice sounds like to others.

Hello, this is Wanda from Camden Books calling for Mrs. Burton. Hello, Mrs. Burton, how are you today?

I'm fine thank you. I am just calling to let you know we just received a shipment of books, and the book, The Tidal Wave, that you ordered is in. Are you still interested in purchasing it?

Wonderful. We will keep it behind the front desk until you are able to stop in to pick it up. Now, Mrs. Burton, I have also received our newest catalogue and I see that one of your favourite authors has just come out with a new book called Once There Was a King. If you are interested, it will be in next Thursday.

Yes, I agree Mrs. Burton; the price of hardcover books has risen over the years. I could put your name in our computer system, and call you as soon as it comes out in paperback. Let me just double check the spelling of your last name...it's B-u-r-t-o-n?

Wonderful. I will call you as soon as I know the paperback release date. I appreciate your business Mrs. Burton, and if there is anything else we at Camden Books can do for you, please don't hesitate to ask. Have a nice day Mrs. Burton. Goodbye.

Evaluation Form

Self Evaluation		Partner's Evaluation		Questions to ask yourself
Yes	No	Yes	No	
				1. Is your voice courteous and pleasant?
				2. Was your volume appropriate?
				3. Was your rate of speech moderate?
				4. Did you pause when you were giving information?
				5. Did you sound interested?
				6. Did you emphasize words that needed emphasizing?
				7. Did you speak in a calm voice?
				8. Was your pitch low?

1. Were you surprised by your own evaluation? Explain your answer.

_____
_____
_____
_____

2. Were you surprised by your partner's evaluation of you?
   Explain your answer.

_____
_____
_____
_____

3. Describe the differences between our everyday speaking voice and
   our professional voices.

_____
_____
_____
_____

Telephone Anxiety

This occurs when we feel anxious, or nervous about talking on the phone. We don't want to talk to strangers or customers. We are worried about getting information wrong, or not knowing what to say.

A large percentage of jobs involve talking on the telephone, so this is something that can stop us from doing jobs that we otherwise would enjoy, or be very good at.

LEARNING ACTIVITY #2

Remember to write in complete sentences and check for correct spelling and grammar.

1. Think about the term "telephone anxiety". Do you have it?

   _____
   _____
   _____
   _____

2. Why are we afraid or anxious when using the phone?

   _____
   _____
   _____
   _____

3. What are some ways to overcome telephone anxiety? Brainstorm and write some suggestions below. Discuss as a group.

   _____
   _____
   _____
   _____

How can we overcome telephone anxiety?

1. Be prepared! Have a pen and message pad available. Use the commercial message pads, which are specific to telephone messages. Fill in all the blanks and you will have covered all the important information.

2. Speak slowly and clearly.

3. Practice. Ask a friend to help you. Script it out. Knowing what you are going to say, takes a lot of pressure off.

4. Anticipate. Imagine you are the customer. Why would you be calling the business? What might you want or need to know? Take the time to learn important information, names of people in your organization, or have this information on hand. Create a sheet of information that you keep handy. This may include a price list, your company history, the names and extensions of staff; whatever people are asking about.

5. If you are unable to answer any questions, take the caller's name and number, find the information, and call the customer back right away. Then add this information to the sheet mentioned above. Next time someone needs this information you will have it.

6. If you will need to transfer calls, find out who does what on your staff and keep this handy. For Example: "Jane in accounting can help you with that Mr. Jones. I'll transfer your call to her desk. If you'd like to write her extension number in your phone book for future reference, it is extension 4321."

What to say...and how to say it

Identify yourself

Whether you are calling someone, or answering incoming calls, identify yourself right away.

Why identify yourself?

If you are calling someone, identifying yourself lets them know *who you are* and *what company you are calling from*. This helps them focus on why you are calling.

You will probably only give your first name. There is usually a policy written in Call Centres about how you answer the phone or greet the person you have called. Make sure you read and understand this policy.

If you are answering an incoming call, identifying yourself and your company lets the caller know right away if they have reached the correct number and to whom they are speaking.

Suggestions for answering the telephone

- "Good morning. Spy Glass Enterprises. Mary speaking."

- "Spy Glass Enterprises. Mary. How may I direct your call?"

- "Good morning. Spy Glass Enterprises. Mary speaking. How may I help you?"

Suggestions for placing a telephone call

- "Hello. This is Mary from Spy Glass Enterprises. I am calling for Tom Lamb. Is he available?"

- "Good morning. May I speak to Tom Lamb please? Thank you . . . Hello. This is Mary from Spy Glass Enterprises."

LEARNING ACTIVITY #3

Call Opening # 1

Make up a name for your company and read the following script with a partner. You are the agent and your partner will be the customer.

Agent: *Thank you for choosing _____(company),*
                    My name is _____ (your name). May I have your
                    telephone number beginning with the area code please?"

Customer: "Yes, it's (613) 123-4567"

Agent: *"And have you ever contacted _____(company)*
                    before?"

Customer: "No"

Agent: *"Thank you. May I have your last name please?"*

Customer: "Coulson"

Agent: *"Okay, could you spell that for me please?"*

Customer: "Yes, that's c-o-u-l-s-o-n."

Agent: *"Thank you Mr. Coulson. May I have your first name please?"*

Customer: "James"

Agent: *"Okay James. May I have your street address, please?"*

Customer: Yes, it's 123 Main Street, This Town, Ontario."

Agent: *"And the postal code, please?"*

Customer: "A1A 2B2"

Agent: *"Perfect and would it be okay for _____
                    (company) to contact you via mail, phone or email?"*

Customer: "Why?"

Agent: *"For your product updates and surveys."*

Customer: "Mail's okay, I guess, but not phone or email."

Agent: *"Okay, and what product are you calling about today, James?"*

Customer: "I have the _____ (product)."

Agent: *"Okay, on the back of the unit or in your users manual there
                    should be a 10 character serial number starting with the letters
                    my, sg or cn, could you look that up for me, please?"*

Customer: "Ah yes, I have it right here. It is my123bn57k."

Agent: *"Okay, that's m - as in Mary, y - as in yellow, 123, b - as in Bob, n - as in Nancy, 57, k - as in kite?"*

Customer: "Yes"

Agent: *"Okay, James. When did you purchase your product?"*

Customer: "About a year ago . . . I am not exactly sure. Does it really matter?"

Agent: *"Well, it does actually, but I can go ahead and troubleshoot with you this time free of charge but if you call again, they may ask you to fax a proof of purchase, okay?"*

Customer: "That's great . . . Want to know my problem now?

Agent: *"Sure, go ahead."*

The customer tells the agent what the problem is, they go through all of the troubleshooting steps to solve the issue then close the call.

Why do you think Call Centres need this information from the customer?
_____
_____
_____
_____
_____
_____
_____

Logging the call

Logging a call means collecting all the necessary information from the customer to correctly track the phone call.

Why is this important?

If you work at a help desk and customers that do not have warranty on a product have to pay for the service you must correctly log the calls to show who they are, how they are paying and what the call was about. If the customer is still under warranty, they do not have to pay for the service but an accurate record of the call must be kept for statistics on the products as well as customer records.

If you log a call incorrectly you may cost the company or the customer a lot of money.

What kinds of information do you collect?

Usually when logging a call you use a software program on the computer. If the first question you ask is for the person's phone number, you would enter that into the computer and see if they already have a log of previous calls.

If there is no record for the customer on file you must complete one before continuing with the call.

You would ask for the full name and address, telephone number, and possibly even which products they own.

Outbound call centres would use a different kind of logging system based on how far into the conversation they got. They already have the customer's name and phone number because they have made the initial call. They must verify that the contact information they have is correct before sending the customer the product or more information by mail.

LEARNING ACTIVITY #4

The instructor will provide you with a script to use for this activity. Four to six members of the class will leave the room. The remaining group members will be shown the message. Then, one of the people who is outside the room will be called back in. The group will relate the message to him or her. Next, another person from outside will be called in. The first volunteer will pass on the message as he or she remembers it. This will continue until the last volunteer has been given the message and recited it. Then, this message will be compared with the original to see how much is the same and what has changed.

Closing the call

When closing a call you must make sure not to rush the person off the phone. There are some basic things that must be addressed first.

- Tell the customer what to expect and when

- Tell them what they should do

- Thank them for their business

- End on a positive note

Steps one and two keeps the customer involved in the process and will ensure the customer has a common understanding of what will happen next. The third and fourth steps show courtesy and respect. If the last thing the customer hears before hanging up is an upbeat positive statement and a heartfelt thank you, he or she will have a favourable impression of you and your company.

LEARNING ACTIVITY #5

Read the following closing statements and identify where each step of closing is accomplished. Use the following key:

Underline Step 1: <u>Tell the customer what to expect, and when</u>

Draw a box around Step 2: Tell the customer what he or she needs to do

Put parentheses around Step 3: (Thank the customer)

Put brackets around Step 4: [End on a positive note]

1. *Ok, Sandy, I'll send the contract out to you today via overnight delivery. When you receive it, sign all three copies, then keep one and return the other two to my attention. Thanks again. I'm really looking forward to working with you on this project.*

2. *I'll fax you a copy of our Client Needs Sheet; it would be great if you could go ahead and fill that out before we meet. That way, we'll be ready to talk about which option will work best for your company. Thank you for your time today, Bill. I'm looking forward to our meeting; see you Tuesday at 10:00 a.m.!*

3. *Shawn, in order to make the deadline for our next issue, I need to have the payment and ad copy in my hands by Friday the 12th. Then I'll have the art staff work up a design and I'll fax it to you for approval. We ask that you turn that around within one day. Thanks for your business! I think this ad is going to be a real success for you.*

Call Monitoring

A good call centre has effective coaching that helps the call centre worker. In Module One we learned that there are typically three techniques of coaching used in call centres. The most effective training method is to use a combination of all three.

A drive-by - when the coach or supervisor overhears a rep's response to a customer while walking by.

Side-by-side coaching - the coach or supervisor sits beside the rep, usually listening in on a headset to both sides of the call.

Remote monitoring - the supervisor or coach listens to calls from a location away from the rep's workstation.

In a good call centre, the monitoring is done to improve the quality of the work while creating a positive learning environment for the agents. To do this, the supervisor looks at different call centre processes to measure agents' performances: average handling time (AHT), Average talk time (ATT), average work time (AWT), average hold time (AHT), following the staffing schedule and average speed of answer.

LEARNING ACTIVITY #6

Match the following call centre process terms on the left with the definitions.

1. __ Average handling time (AHT)

2. __ Average talk time (ATT)

3. __ Average work time (AWT)

4. __ Average hold time (AHT)

5. __ Following the staffing schedule

6. __ Average speed of answer

a) A measure of whether the staff in queue are ready to take calls during the period of time they are expected to.

b) The average length of time it takes the rep to handle each call, including talk time and after-call time.

c) The average length of time the rep spends out of queue doing wrap-up (finishing) work on a call after the call has been completed

d) The average time a caller was on hold before his or her call was answered by a rep.

e) The average amount of time the customer was on hold per call during a call.

f) The average length of time the rep spends talking to the customer in each call.

Module 5
Computer Skills

Basic External Hardware

External hardware components are the physical parts of the computer, and the devices that are connected to it.

Examples of external hardware include:

- Monitor

- Keyboard

- Printer

- Scanner

- Tower/Case

- Mouse

- Speakers & Headphones

- Laptop

Internal Hardware

Internal hardware components are the physical parts of the computer that you cannot see without removing the case. These parts are the "brains" of the computer which control all of the devices that help you and your computer communicate.

Examples of internal hardware include:

- CPU (Central Processing Unit)

- RAM (Random Access Memory)

- Hard Drive

- Mother Board

- Ports

- Expansion Cards

The **CPU or the Central Processing Unit** is where all data is processed and transmitted to the operating system. The data is then sent to the appropriate device or program.

Random Access Memory (RAM) is where all the work is done. Any program or operating system (games, Windows, Word) operates within the RAM. Anytime you create, change or save data, you are working in RAM. Once you are finished and you close the program the data is saved to the hard drive.

The **hard drive** is a physical metal disk inside your computer where data is stored.

The **mother board** is where all devices connect, to provide a path to the CPU and the RAM.

Although **ports** are external sockets which allow connection between a device and the mother board, the component is considered an internal part. The face plate that

you can see from the outside is just that-a face. The "organs" of the port are stored inside the case.
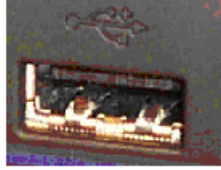
An **expansion card** is an electronic card that plugs into the mother board to provide additional ports so that the user can connect multiple devices.

LEARNING ACTIVITY # 1

Draw a line from the picture to the correct name.

Scanner
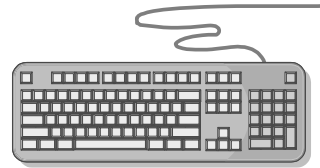
Laptop
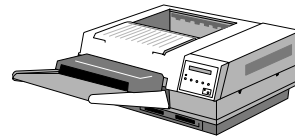
Monitor
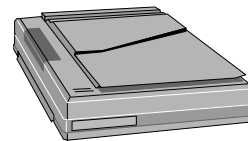
Printer
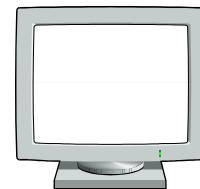
Keyboard
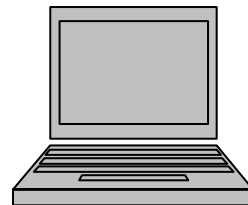
LEARNING ACTIVITY #2

Put an (E) beside each piece of hardware that is an external component and an (I) beside each internal component.

___ Mother Board	___ Monitor
___ Keyboard	___ CPU
___ Printer	___ Mouse
___ Scanner	___ RAM
___ Tower/Case	___ Laptop
___ Speakers	___ Headphones
___ Expansion Cards	___ Ports
___ Hard Drive	

Input and Output Devices

Input Devices

Input devices are pieces of hardware that attach to your computer. They provide a line for communication between the computer and yourself.

Some examples of input devices include:

- Keyboard

- Mouse

- Scanner

- Microphone

Output Devices

Output devices are also pieces of hardware that are attached to your computer.

An output device is a device that produces a visual (something you can see) or audio (something you can hear) result.

Some examples of output devices include:

- Monitor

- Printer

- Speakers & Headphones

LEARNING ACTIVITY # 3

Put an (O) beside each piece of hardware that is an output device and an (I) beside each input device.

__ Keyboard   __ Monitor   __ Mouse

__ Scanner   __ Printer   __ Microphone

__ Speakers   __ Digital Camera   __ Joystick

LEARNING ACTIVITY # 4

1. In your own words describe what hardware is. Use complete sentences and watch your spelling and grammar.

_____
_____
_____
_____

2. In your own words describe what input devices do. Use complete sentences and watch your spelling and grammar.

_____
_____
_____
_____

3. In your own words describe what output devices do. Use complete sentences and watch your spelling and grammar.

_____
_____
_____
_____

Basic Software

Software is a program that allows you to control certain functions of your computer. Without software your computer is like a bicycle without any wheels. It simply will not work!

Examples of software include:

- Solitaire

- Microsoft Word

- Windows XP

- DOS

Operating System and Application Software

Operating System Software

Operating systems enable you to interact with the internal and external hardware such as having control over the keyboard and mouse. Without an operating system, the computer is nothing more than a box full of parts. In addition, the operating system allows you to interact with programs and applications. You cannot run applications if you do not have an operating system.

Examples of operating system software include:

- Windows XP

- OS X (MacIntosh)

- DOS

- Windows 98

- Windows 2000

Windows Basics

Next, we will learn how to use the basic functions of Windows. During this
section you will learn how to:

- use the computer drives to save your work

- create new files and folders

- move files from place to place

- use the keyboard functions to help you complete tasks more quickly and
  easily

- use the "*Help*" menu

<div style="border:1px solid">

Let's Get Started!

</div>

Drive C's Files

To find out about your hard disk, *click the "C:" icon*

which is in the "My Computer" window. (Double click "*My
Computer*" to see the contents of the folder).

Here's what happens:

Windows 95 & XP: the screen's bottom tells you the disk's total capacity and how
much of it is still unused (free).

Windows 98 & Me: the screen's left is a pie chart showing the disk's total capacity, how much of it is used up, and how much of it is still unused (free).

To find out *more* about your hard disk, right-click the "C:" icon (by using the *right* mouse button). You will see a shortcut menu, and then choose "*Properties*" from that menu (by clicking "*Properties*"). You'll see a *fancy* pie chart showing the disk's total capacity, how much of it is used up, and how much of it is still unused (free). When you finish admiring that chart, click "OK".

To find out *even more* about your hard disk, double-click the "C:" icon. You'll see the C window, which lists files that are on the hard disk.

Make sure the C window fills the whole screen. (If it doesn't, maximize the C window by clicking the maximize button, which is next to the "X" button.)

If the hard disk contains more files than can fit on the screen, view the remaining files by using the scrolling buttons, which are at the screen's right edge.

For each file, you see the file's name and a tiny picture (icon) representing the file.

Your computer can handle 3 kinds of files:

1. If the file's a **document**, its icon typically looks like a notepad (or else a

   dfinstall
   Text Document
   0 KB

   page whose top right corner is bent).
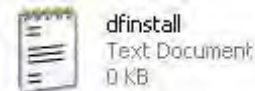
2. If the file's an **application program**, its icon typically looks like a window.

   Persi0
   System file
   6,174 KB

3. If the file's a **folder** containing other files, its icon looks like a yellow manila

   WINDOWS

   folder.

In the C window, you see a folder called "*Program Files*", a folder called "*Windows*" or "*WINDOWS*", and a folder called "*My Documents*" or "*Documents and Settings*".

Windows 95 & 98 call them "*Program Files*", "*Windows*", "*My Documents*".

Windows Me calls them "*Program Files*", "*WINDOWS*", "*My Documents*".

Windows XP calls them "*Program Files*", "*WINDOWS*", "*Documents and Settings*".

Those folders are extremely important. You might also see some extra folders, documents, and application programs.

If you double-click a folder, a new window shows you what files are in the folder.

The exception: if the files in that folder are dangerous to change:

Windows 98 might say "*Warning*";

Windows Me might say, "*Please be careful*";

Windows XP might say, "*These files are hidden*".

If you insist on seeing those files anyway:

Click Windows 98's "*Show Files*";

Or click Windows Me's "*View the entire contents of this folder*";

Or click Window XP's "*Show the contents of this folder*".

When you finish examining the new window, either close it (by clicking its "X" button) or go back to the previous window (by clicking the "*Back*" button, which exists in Windows 98 & Me & XP and is near the screen's top left corner). Read pages 40, "*Viewing the Contents of a Folder*", and pages 52-53, "*Selecting Files*", in the Windows XP textbook.

If you click a file's icon, here's what happens:

Windows 95: if the file's a document or application program, the bottom of the screen shows you how many bytes are in the file;

Windows 98 & Me: the screen's left area shows you the file's name, the file's type (such as "*Document*", "*Application*", or "*File Folder*"), the date & time when the file was last modified, and (if the file's a document or application) the file's size;

Windows XP: the screen's bottom left corner (under the "*Details*" heading) shows you the file's name, the file's type (such as "*Document*", "*Application*", or "*File Folder*"), the date & time when the file was last modified, and (if the file's a document or application) the file's size.

Here's what happens if you double-click a file's icon:

If the file's a folder, you see what's in the folder.

If the file's an application program, the computer will try to run the program. Don't do that unless you've read instructions about how to run the program successfully!

If the file's a document, the computer will try to use that document to try to run the program that created the document, but sometimes the computer can't correctly deduce which program created the document. (For example, if you created a document by using WordPad in Windows 95 & 98 & Me and your hard disk also contains Microsoft Word, the computer will get confused and wrongly think you created the document by using Microsoft Word, so the computer will start running Microsoft Word.)

View menu

While you're viewing icons, you can change their appearance by clicking the word "*View*", which gives a View menu.

The menu offers these choices:

If you click "*Large Icons*" (which Windows XP calls "*Tiles*"), the icons will get as large and lovely as when you bought the computer. Try it!

If you click "*Small Icons*" (which Windows XP calls just "*Icons*"), the icons will get small, and so you fit more of them on the screen. Try it!

If you click "*List*", the icons will get small and organized so you begin by reading down the left column. Try it!

If you click "*Details*", the icons will get small and be accompanied by a comment showing each file's size and the date & time when the file was last modified. *Try It!*

If you click "*Thumbnails*" (which is available just in Windows Me & XP), you'll get an effect similar to "*Large Icons*", but you'll see a photo instead of a large icon for any file representing a photo (or a graphic similar to a photo). *Try It!*

Usually you'll be happiest if you choose "*List*".

New Folder

Double click on the icon for the "*Hard Disk Drives*", then double click on the folder "*Documents and Settings*".

To create a new folder, click "*File*" (which is at the screen's top left corner). You will see the File menu. From that menu, point at "*New*", and then click "*Folder*".

A new folder will appear. Type your name and press "*Enter*". *Try It!*

For classroom computers that are part of a network and are set up with "*deep freeze*", your new folder will be eliminated each day. This is to keep the "C" drive from being over-loaded with student documents. In the next lesson, you will learn how to save your work to your own "*3 ½ "Floppy" disk*", rather than into the folder on the "C" drive.

Close the "*C*" window when you have finished examining the files that are on hard disk "*C*". Do this by clicking its "*X*" button. *Try It!* Read pages 42-43, "*Using My Computer*", in the Windows XP textbook.
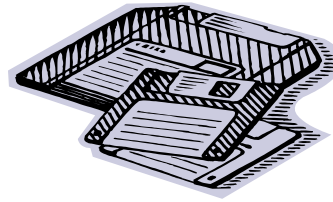
Drive A's Files

Insert the floppy disk into "Drive A". Try this. Take any standard floppy disk (which is a 3½-inch square) and hold it horizontally, so that the disk's label is on *top* of the disk.

Find your computer's floppy-disk drive. It's a 3½-inch horizontal slit in a tower computer's front or a notebook computer's side. On most computers, that slit is easy to see; on weird computers (such as ones built by eMachines), the slit is covered by a door you must unlatch.

Insert the disk into the slit, so the disk's label stays on *top* of the disk, and so the disk's silver metal edge goes into the slit before the other edges.

Analyze the Floppy Disk

Double-click the "*3½ Floppy A:*" icon, which is in the My Computer Window. You'll see the A: window, which tries to list all files that are on the floppy disk.

If the disk hasn't been properly prepared yet (because it wasn't formatted or was intended for a Macintosh computer), the computer says "*The disk in drive A is not formatted.*" Here's what happens:

Windows XP: Press "*Enter*", 3 times. The computer will format the disk (which takes a few minutes) then indicates "*Format Complete*". Press "*Enter*", and then click "*Close*".

Windows 95 & 98 & Me: Press "*Enter*". Click "*Full*". Click the "*Start*" that's above "*Cancel*". The computer will format the disk (which takes a few minutes) then indicate "*Format Results*". Press "*Enter*", and then click "*Close*".

If there are no files on the floppy disk yet, here's what happens:

Windows 95 & Me: The screen's bottom left corner displays "0 object(s)";

Windows 98: The bottom of the screen displays "0 bytes";

Windows XP: The screen consists mostly of a big, white, empty square.

If the floppy disk contains more files than can fit on the screen, view the remaining files by using the scrolling buttons, which are at the screen's right edge.

For each file, you will see the file's name and an icon representing the file. When you finish examining them, close the "A" window by clicking its "X" button.
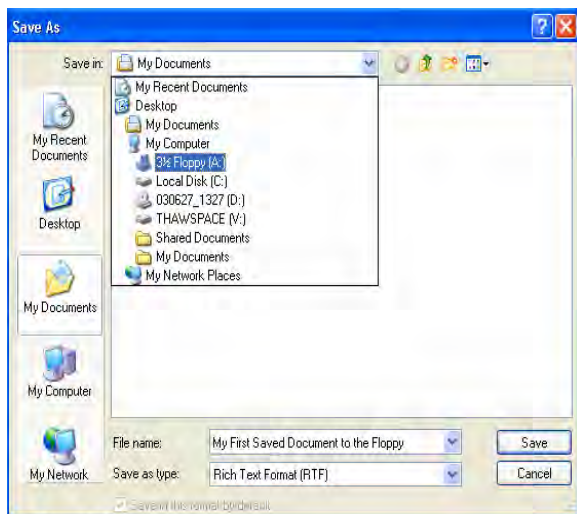
Eject the Floppy Disk

When you finish using the floppy disk, eject it from the drive by pressing the eject button, which is under the slit's right-hand edge.

Saving to the Floppy Disk

Often you will save your work to the floppy disk. Place your floppy disk back in the A: drive slot. In order to save, you must first work on a file. Open either Paint or WordPad and quickly make a document to save. Once you have created your document, click on "*File*" then "*Save As*". The "*Save As*" pop-up menu appears.

Click the "*Save In*" arrow and a drop-down menu shows up. Select the "*3 ½ Floppy (A:)*" drive. This is how you change where the file will be saved. Next, type in the name of the document where it says "*File Name*". The file name will appear on the Floppy A drive along with other file's saved to the Floppy. Once you are finished, click "*Save*". Close your program by clicking the "X".

Floppy" by doing this:

Send to Floppy

To copy a file to a floppy disk (in the floppy drive), do this:

Right-click the file's icon. Click "*Send To*". Click "*3½ Floppy*".

Try It! Create a document in WordPad and save it to the desktop. To do that, click on "*File*", then "*Save As*". Beside the "*Save in*" box, click the down arrow, then click on "*Desktop*". Beside "*File name*", type a name for your document, then click "*Save*". Close your document by clicking on the "X". Look for your document's icon and name on the desktop. Right click on the file's icon on the desktop. Then click "*Send To*". Select "*3 ½ Floppy (A:)*". Now open up "*My Computer*" by double clicking on its icon. Then double click on "*3 ½ Floppy (A:)*". You should now see your document on the "A" disk. You sent the file from the desktop to the Floppy. Now close all windows by clicking on "X" until you are back to your desktop.

That works if your computer was set up properly by the manufacturer.

If the "*3½ Floppy*" choice is missing from the "*Send To*" menu or generates an error message, teach the computer how to handle "*3½ Floppy*", by doing this:

<u>Windows 95 & 98 & Me:</u> Double-click the "*My Computer*" icon, then the "C:" icon, then the "*Windows*" icon. If the computer says the phrase "Show files" or "*View the entire contents of this folder*", click that phrase.

<u>Windows XP</u>: Click "*Start*" then "*My Computer*". Double-click the "C:" icon, then "*Documents and Settings*", then your name. Make sure you see the "*Send To*" icon. (If you don't see it, make it appear by doing this: click "*Tools*", then "*Folder Options*", then "*View*", then "*Show hidden files and folders*", then "*OK*".)

Then do this:

Double-click the "*Send To*" icon. Click "*File*" (which is at the screen's top left corner), then "*New*", then "*Shortcut*". Put a floppy disk into drive "A". On the keyboard, type "a:" (and then press the "*Enter*" key twice). Close all windows (by clicking their "X" buttons). Read pages 68-69, "*Copy a File*", in the Windows XP textbook.

Send to My Documents

To copy a file to your hard disk's "*My Documents*" folder (if the file isn't there already), do this:

Right-click the file's icon (i.e. the document you saved to the Desktop). Click "*Send To*" then "*My Documents*". The computer copies the file to the "*My Documents*" folder. If the file's being copied from another place on that hard disk, the computer deletes the original file, since the computer figures you don't need the file to be on the hard disk twice.

To see your document's icon in the "*My Documents*" folder, click "*Start*", then click on "*My Documents*". Look for your document's icon and name. Since this was just for practice, we'll delete this document from the "*My Documents*" folder. Click your document's icon so that it is highlighted, then click the big red "X" that is right beside the blue curved arrow (do not click the small "X" in the corner because that will just close this window). The big red "X" is the "delete" button. Click "*yes*" when asked. Now you can close this window by clicking the small red "X" in the upper right corner. That works in Windows 98 & Me & XP but not Windows 95.

Send to Desktop

To copy a file to your Desktop (which is the main screen), do this:

Windows 98 & Me & XP: Right-click the file's icon. Click "*Send To*" then "*Desktop*". You have had some practice with this already when you went through "File", "*Save As*", and "*Desktop*". This is simply another method.

Windows 95: Right click the file's icon. Click "*Copy*". Close all windows. Right-click on a blank space in the middle of the screen. Click "*Paste Shortcut*".

To save disk space, that technique copies just the file's icon to the Desktop. The file itself stays just in its original location.

On the Desktop, the file's icon's bottom left corner has a bent arrow, which means the icon is just a shortcut (which points the computer to the original location).

In Windows 98's first edition, that shortcut icon has the same name as the original file. In Windows 98's second edition & 95 & Me & XP, that shortcut icon has the file's original name but with "*Shortcut to*" added in front; for example, if the file's original name was "*Love*", the shortcut icon's name is "*Shortcut to Love*".

If you double-click that shortcut icon, the computer will try to find the original file and run it. If the original file was on a floppy disk or CD, it will work only if the file's floppy disk or CD is still in the drive.

Rename

To change the file's name, do this:

First, create a new document in WordPad. Open WordPad and type a sentence or two, then save your document to your "*3 ½ Floppy (A:)*" disk, and name it "*Rename 1*". Close WordPad, then re-open it. Click on "*File*", then "Open" to see the list of documents on your floppy disk. For your document called "*Rename 1*", click the file's icon, then click the file's name. Now type a new name (call it "*Rename 2*"), and press "*Enter*".

This works only if the file is on a hard disk or floppy disk (not on a CD). Read page 55 in the Windows XP textbook, "*Rename a File*".

Delete

To delete the file, try this procedure:

Click the "*Rename 2*" file's icon. Press the "*Delete*" key. Click on "*Yes*" when you see the question: "*Are you sure you want to delete* 'Rename 2'?" Press "*Enter*".

Try It!

Another method is to right-click on the file's icon, then select "*Delete*" from the drop-down menu.

This procedure works only if the file is on a hard disk or floppy disk (not on a CD). If the file's on a floppy disk, this procedure deletes the file immediately. If the file's on a hard disk, this procedure moves the file to the Recycle Bin, which holds hard-disk files that you have deleted.

Peek in the Recycle Bin to discover what's in there. Double-click the "*Recycle Bin*" icon (which is typically at the screen's left edge but might have moved

elsewhere, such as to the screen's bottom right corner). You'll see the Recycle Bin window, which shows a list of hard-disk files you previously deleted. (If you don't see a file list, the Recycle Bin is empty.)

To see more information about the files in the Recycle Bin, make sure the Recycle Bin window is maximized (so it fills the whole screen), and make sure you're seeing the "*Details*" view (by clicking "*View*" then "*Details*").

To see even more details about a certain file, right-click the file's icon and then click "*Properties*". When you finish admiring the details, click "*OK*".

If you change your mind and do *not* want to delete a certain file, right-click the file's icon and then click "Restore". That makes the computer pull the file out of the

Recycle Bin and put the file back to its original location on the hard disk. *Try It!*

If, on the other hand, you really *do* want to delete a certain file, click the file's icon and then press the "*Delete*" key; then press "*Enter*". The file will disappear.

To delete *all* files from the Recycle Bin, do this:

Windows XP: click "*Empty the Recycle Bin*", which is at the screen's left edge;

Windows 98's second edition & Me: click "*Empty Recycle Bin*", which is at the screen's left edge;

Windows 98's first edition & 95: click "*File*" then "*Empty Recycle Bin*" Then press "*Enter*".

When you finish admiring the Recycle Bin window, click its "X" button.

Shift Delete

You've learned that to delete a file, the usual procedure is to click the file's icon, then tap the "*Delete*" key, then tap the "*Enter*" key. If the file was on the hard disk, that procedure moves the file into the Recycle Bin. Notice that the procedure involves tapping the "*Delete*" key. If instead you tap the "*Delete*" key **while holding down the** *"Shift" key*, the computer deletes the file immediately instead of moving it to the Recycle Bin. Read pages 62-63 in the Windows XP textbook, "*Delete a File*", and pages 64-65, "*Restoring a Deleted File*" (Recycle Bin).

Multiple Files

To "delete" or "send" several files at once, highlight the files you want to manipulate. Here's how:

First, you need to create some documents that you can work with to practise this activity. In WordPad, type a sentence, then save this document to your floppy disk and name it: "*Multiple Files 1*". Open a new document in WordPad and type another sentence. Save this one to your floppy disk, naming it: "*Multiple Files 2*". Repeat this process, naming the next two documents: "*Multiple Files 3*" and "*Multiple Files 4*". Close WordPad, and then re-open it. Click on "*File*", and then on "*Open*", so that you can see your list of documents on your floppy disk. You will be working with the four documents that you just created.

Method 1: Click the first file you want to manipulate. **While holding down the** *"Ctrl"* **key**, click each of the other files you want to manipulate. That highlights all those files. (If you make a mistake and accidentally highlight an extra file, click it again while holding down the "*Ctrl*" key, to remove its highlighting.)

Method 2: Click the first file you want to manipulate. **While holding down the** *"Shift"* **key**, click the last file you want to manipulate. That highlights the first file you want, the last file you want, and also all files in between.

Method 3: Click the first file you want to manipulate. **While holding down the** *"Ctrl"* **key**, tap the "A" key (which stands for "All"). That highlights *all* files in the folder. (That method works just while you're *not* running a program such as WordPad or some other program.

Then proceed as follows:

If you want to "delete" the files, press the "*Delete*" key then "*Enter*".

If you want to "send" the files, right-click the first file and follow the rest of the instructions about how to send them to where you want.
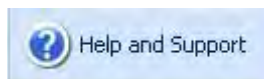
You'll discover that the other files magically "tag along" with the first file, because they're highlighted also. Since you do not need these four documents, highlight all four (using whichever method you prefer), then press the "*Delete*" key. Try it!

Help

For further help in learning how to use Windows, do this:

Windows Me & XP:

Click "*Start*" then "*Help*".

You will see the "*Help and Support*" window. Maximize it (by clicking it's maximize button). Try It!

What topic do you want help with? To express your desire, do this:

At the screen's left edge, you will see a list of the **major** topics. You can click the topic you want. However, since we are learning about "*Windows*", select "*Window Basics*". Then at the screen's left edge, you will see a list of subtopics; click the subtopic "*Tips for using Help*", then click on any topic under the "*Pick a Task*" title. You can use the green "*Back*" arrow to move back at any time to the "*Pick a Task*" window. Try It!

Now close "*Help*" and reopen it.

Type any topic you can imagine. Your typing will appear in the Search box. Then press "*Enter*" You can again select any topic that you wish to read more about. Try It!

Now close "*Help*" and reopen it.

Click "*Index*" (which is at the screen's top). The computer tries to show an alphabetical index of *all* topics about Windows. You will see just the index's beginning; to see the index section about the topic you want, type the first few letters of the topic's name. When you see your desired topic, double-click it.

Try It!

All of the above methods are ways to use help.

When you finish using help, close the "*Help and Support*" window by clicking its "X" button.

Windows 95 & 98:

Click "*Start*" then "*Help*".

You will see the Windows "*Help*" window. Maximize it (by clicking it's maximize button).

What topic do you want help with? To express your desire, do this:

Click "*Contents*". The computer shows a list of the *major* topics. Click the topic you want help with; you will then see a list of subtopics. Click the subtopic you want help with. If you're using Windows 95, you must *double*-click instead of a single click.

Or do this:

Click "*Index*". The computer tries to show an alphabetical index of *all* topics about Windows. You will see just the index's beginning; to see the index section about the topic you wish, type the first few letters of the topic's name. When you see your desired topic, double-click it.

When you finish using "*Help*", close the Windows "*Help*" window by clicking its "X" button. (If you don't see an "X" button, click "*Exit*" and then click "*Exit Tour*".) Read pages 20-21 in the Windows XP textbook, "*Using Help*".

The Shift Key:

It is used exactly the same as a typewriter in Windows. It makes capital letters and allows you to use the comic strip "cursing symbols" such as @#$%. The Shift Key can also be used to highlight text, like you would do with your mouse. Try it… Open WordPad and type some words into the text document. Click at the beginning of the text, then hold down the "*Shift*" key (don't release it). Now move your cursor with the arrow keys. You should be able to highlight text this way.

The Alt Key:

The Alt key stands for "*Alternate*." When you push this key in Windows, the cursor moves to the menu bar at the top of the screen. It's the same as clicking your mouse on the "*File*" Menu above. From there you can use the arrow keys to select menu options. This is useful if you don't like switching between your mouse and keyboard often. Press "*Alt*" again to move the cursor back off the menu bar.

The Windows Key:

This key opens the "*Start Menu*" at the lower left corner of your screen. It has the same effect as if you clicked the "*Start*" button with your mouse.

The Ctrl Key:

The "*Ctrl*" key stands for "*Control*." This key is used in combination with other keys to perform specific tasks, often called shortcuts. One example is "*Ctrl + P*." Programs automatically print the document you are using if you push the Control button and the "P" key at the same time.

The Delete Key:

This key erases the character directly to the right of your cursor. If you have text or graphics that are highlighted, those are erased by pushing this key as well.

The Backspace Key:

This key erases the character directly to the left of your cursor. If you have text or graphics that are highlighted, those are erased by pushing this key as well.

Enter:

The "*Enter*" key works very much like the "*Return*" key on a typewriter. However, do NOT press "*Enter*" after every line when you are typing a document. Windows knows when you are reaching the end of a line, and will automatically go to the next line. If you do press "*Enter*" after each line, and then attempt to change the font or size of the document, you'll see some strange results! Pressing "*Enter*" when a question appears in Windows, is similar to pressing an "*OK*" button, or a "*Yes*" button.

Tab:

Similar to a typewriter, the "*Tab*" key will insert indentation into a document. It also jumps from box to box when entering a form online, or in Windows.

Insert:

The insert key (located on your keyboard just above the "*Delete*" key) toggles or switches between the "*Insert Mode*", and the "*Overwrite Mode*". The "*Insert Mode*" will insert text where the cursor is positioned when you type. For example, if you earlier typed the phrase "Windows is Fun", then moved your cursor between "is" and "Fun" and typed "REALLY", the result would be "Windows is REALLY Fun." However, "Overwrite Mode" simply writes over anything in its path. In our last example, the word "Fun" would have been written over by "REALLY", making the sentence read, "Windows is REALLY."

Num Lock:

If you look at your Numeric Keypad (that group of keys to the right with all the numbers on it), you'll see that there are arrows and words under most of the numbers. When "*Num Lock*" is turned on, you can use those keys to enter numbers (instead of using the row right above the keyboard letters). When "*Num Lock*" is turned off, you can use the arrows and commands printed below the numbers.

Home / End / Pg Up / Pg Down:

Often the "*Home*" key is used to move your cursor to the beginning of a line, and the "*End*" key is used to move it to the end of a line. "*Page Up*" and "*Page Down*" are slightly misleading. Often, the "Page Down" key won't move your cursor from Page 2 to Page 3, like you would think it would. Instead, they often move the cursor up/down one "screen-length", meaning that if you push the "*Page Down*" key, the top of the screen becomes what was just after the bottom of the screen,

before you pressed the key. That's hopelessly confusing, so try it out yourself. Type 2 or 3 lines of text in your WordPad document. Press the "*Page Up*" key. The cursor moves to the top of your document. Now press the "*Page Down*" key to see the cursor move to the bottom of this current document. These four keys can be very useful when you want to navigate quickly around a document.

Activity

Let's make use of some of the stuff we've heard about in the first part of our lesson!

1. Click on the "*Start*" menu button.
2. Point to "*All Programs*".
3. Hover your mouse pointer over the "*Accessories*" title.
4. Select the "*Notepad*" program by clicking on it.
5. Type the following:

   "I LikE tO uSe CaPiTaL LeTtErS!
   This is my next sentence. I don't like it.
   This sentence is far away."

6. Be careful to capitalize the first sentence properly using the shift key.
7. Don't forget to press "*Enter*" to get a new line after each sentence!
8. To tell the computer you don't want a section of text, you need to "highlight" it. To highlight, simply put your pointer next to the text to be highlighted. Hold down a single left click, and drag the mouse pointer over the text until the text you want highlighted is completely covered with the blue field (or is outlined in black).
9. Highlight the sentence "I don't like it."

10. Press the "*Delete*" button. The text will disappear.

11. Next, move your mouse pointer to the left side of the word "far". Click.
12. Your cursor will move and be next to the word "far".

13. Type the word "far" and put a space in. Now the sentence should contain two "far"s.

14. Move your cursor to the beginning of that sentence by pressing the "home" key.

15. Press the "*Tab*" key twice. Now that sentence certainly is far far away!

16. Now to use a control key; press "*Ctrl*" and "*P*" at the same time.

17. This will open the print menu (see image below). Click the "Print" button.
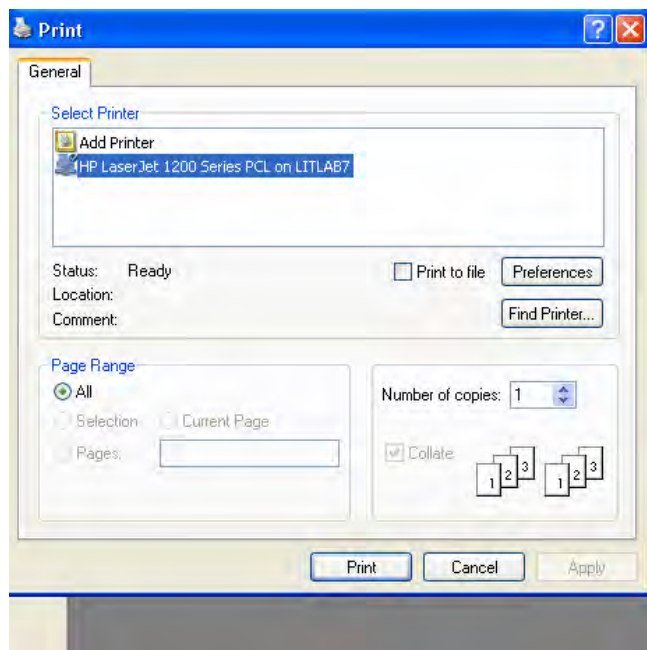
18. Your work will be printed. You have created your first document! Congratulations!

19. Click the red "X" on the top right of your window. This will close the document.

20. The program will then ask you if you want to save your work. Click "*No*".

Changing the Window Views

Resizing a Window

In order to resize a window, first click the "Restore down" button next to the "X" in the upper right hand corner of an open program. To make the screen wider, hold the mouse over either the right or left blue edge of the window. You will notice that the cursor changes from a single headed white arrow to a double headed black arrow. This means that you can now drag the outside edge in or out. To make the window wider, click and drag out. Similarly, to make the window shorter or taller place the cursor on the top or bottom blue line, until you see the double headed black arrow and drag up or down.

Moving a Window

To move a window around, hold the mouse pointer over the title of your program (in the top blue bar). Now, left-click and hold while you drag the window to where you want it to go. For practice, take your Notepad window to the top of the screen. To close this program, click on the "X", when you have finished trying this activity.

Scroll Bars

When you open a large document, you won't be able to see the entire document. Some of the text or picture will be further down the page or out of sight to the

right. To see what is missing, click the up and down arrows on the

right hand side of the document. To see to the right, click the little right pointing arrow in the bottom of the document. Read page 6 in the Windows XP textbook, "Scroll Bars".

Application Software

Application software helps you create things like letters and pictures. Every time you scan a picture you need software to view it, change it or print it.
You need different types of software for different tasks.

Examples of application software include:

- Solitaire

- Microsoft Word

- Adobe Photoshop

- Printmaster
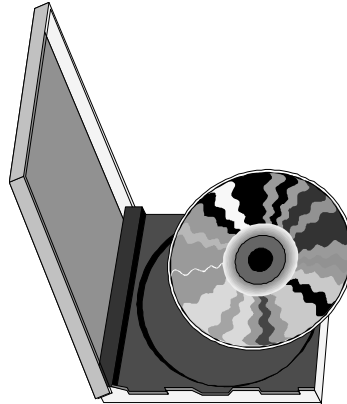
LEARNING ACTIVITY # 5

Put an (A) beside the examples of application software and an (O) beside the examples of operating system software.

__ Windows 98   __ Photoshop   __ Internet Explorer

__ OS X   __ DOS   __ Bejeweled

__ Printmaster   __ Windows XP   __ Microsoft Word

LEARNING ACTIVITY # 6

1. In your own words describe what software is. Use complete sentences and watch your spelling and grammar.

    _____
    _____
    _____
    _____

2. In your own words describe what application software is. Use complete sentences and watch your spelling and grammar.

    _____
    _____
    _____
    _____

3. In your own words describe what operating system software is. Use complete sentences and watch your spelling and grammar.

    _____
    _____
    _____
    _____

The Internet

The Internet is a worldwide network that can connect to any and all computers anywhere in the world.

Most people these days are familiar with the Internet. However, it can be difficult to keep up with all the changes, new uses or even new words that are being created each day.

Here's a handy TIP:

> www.webopedia.com is an online dictionary-encyclopedia that focuses on computer and technological terminology.
>
> This is a great learning tool that can be helpful throughout this workbook.
>
> You could also use it at school, at home or at work.

from: **www.webopedia.com/TERM/n/network.html**
Material & Graphics reprinted, cited, or adapted, with permission, from Literacy Plus of Port Colborne & Wainfleet, PORT CARES, 92 Charlotte Street, Suite 104 Port Colborne, ON L3K 5V3   Tel: 905-834-3629; Fax: 905-834-5805
literacyplus@portcares.on.ca, www.portcares.on.ca

Try It!

1. Click on the [icon] icon. Type [address bar graphic] the address in the address bar. Press "*Enter*".

2. In the search bar, type the word that you want to look up and click "Go".

3. In this case we chose "network".   After clicking "*Go*", you will see something like this:

network
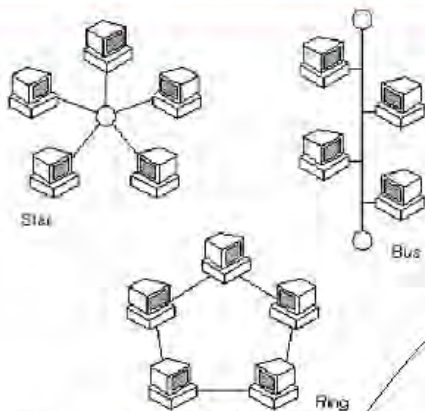
When you click on an underlined word, it will produce another definition. If you click on "computer systems" you will see:

computer system

A complete, working computer. The computer system includes not only the computer, but also any software and peripheral devices that are necessary to make the computer function. Every computer system, for example, requires an operating system.

(n.) A group of two or more computer systems linked together. There are many types of computer networks, including:

- local-area networks (LANs) : The computers are geographically close together (that is, in the same building).
- wide-area networks (WANs) : The computers are farther apart and are connected by telephone lines or radio waves.
- campus-area networks (CANs): The computers are within a limited geographic area, such as a campus or military base.

Viruses and Firewalls

Viruses

A computer virus is a small program or application that can change, delete or activate files or programs on the computer without your knowledge.

Viruses are contracted through email or from website links. To protect yourself you should run an up-to-date anti-virus program such as McAfee or Norton Anti-virus at **all** times. These programs *scan* any information coming into you computer. While this will protect your computer from known or similar viruses, it may not protect you from new viruses. There are many different types of viruses and new ones are being produced daily.

To help keep your computer clean of viruses you should:

- run an up-to-date anti-virus software
- only open emails and attachments from people or addresses that you know or recognize
- be very careful about which websites you visit. "*Official*", government or company websites are **usually** safer than personal or home user sites

Firewalls

A firewall is a "gatekeeper". It is the first line of defense and protects a network from unwanted guests such as hackers and websites and other programs that access your computer over the Internet or a networked group of computers. A firewall determines the rules for who has access to the network.

Network Security

BEWARE! *Do not* try to circumvent or "get around" any local or network security settings (This includes any firewalls or administrative settings that you have no direct control over.). It is dangerous for the network, the computer and to your employment.

LEARNING ACTIVITY # 7

Circle true or false for each statement.

True   False - A computer virus is a program that helps you fix computers.

True   False - Not all viruses are destructive.

True   False - The majority of viruses enter your computer via email.

True   False - Norton Virus Scan and McAfee are types of antivirus software.

True   False - A firewall protects computers from hackers.

LEARNING ACTIVITY # 8

Test your knowledge of Internet words by writing the correct word beside the definition.

Bookmark   Browser   Search Engine

Downloading   GIF   JPEG

1. _____ the electronic transfer of information from one computer to another.

2. _____ a program that you use to navigate the World Wide Web.

3. _____ a link saved by the user to a particular Web page.

4. _____ www.google.com is an example of this.

5. _____ the most common type of image file, compressed so they take up the minimum amount of space and can therefore be downloaded more quickly than other graphics files.

6. _____ a type of image file used on the Internet

E-mail

Email has become a standard form of business communication. Because it is relatively new when compared to handwriting or telephone conversations, some people are not aware of the proper way to write an email. Most often you find that emails are not written with proper grammar, or even in full sentences. If you are sending an email to a client or a co-worker, you must remember that this is still a business letter and should be written as if you were writing a proper letter.

E-Mail Etiquette

The communication media (e.g., mail and telephone) has conventions that guide their use. Courtesies such as using `yours sincerely' in a letter, or announcing your name and/or number when you answer the telephone, help promote a good communication between you and your colleagues or clients.

Electronic mail, however, is a relatively new form of communication, and the number of new users is increasing dramatically. Few people are aware of appropriate conventions to use. These conventions (often called `network etiquette', or `netiquette') are important because it is easy to dispatch email messages very quickly, and not think about how a message will be received.

For example, if you had intended something in fun, will the humour be evident? If not, it could become quite offensive. A simple convention is to use what are known as 'smileys': for example, :-) means that what you wrote is a joke.

Here are some suggestions for good e-mail etiquette:

1. Make the subject line a headline - Good e-mailers summarize their message into a single subject line of no more than 5-8 words.

2. Be courteous in all e-mail - "Flame mail" (angry messages that insult or ridicule), are now common in cyberspace. Don't participate in this rude behaviour, be as courteous face to screen as you would be face to face.

3. Be careful what is said and promised - E-mail is written so it holds more weight in a court of law. All e-mail accounts provided to employees by employers are property of the employer, who is within his rights to read all email sent to his e-mail accounts. Be careful what you say and to whom you say it. This is especially important for those sending messages to or receiving messages at an e-mail address at work. If you have your own business, be really careful not to promise anything that cannot be fulfilled since e-mail is as valid as a stamped letter in a court of law.

4. Do not send unsolicited files - There is nothing more annoying for an Internet user than to have to wait for 10 minutes to download an file they did not ask for that is attached to an e-mail message. Ask a recipient's permission before sending a file via e-mail.

5. Do not overuse fonts, colours, graphics and clipart in e-mail messages.

6. Do not respond to spam messages - Spam is the nickname given to all unsolicited commercial e-mail messages sent to you. They have earned the name spam as a result of their "canned" appearance. If you frequently receive spam, you might be tempted to request that the spammer remove you from his list. This is the worst possible thing you could do. A reply to a spam message only confirms to the spammer that your e-mail account is valid. Instead, simply hit the delete button.

7. Don't use too much punctuation!!! - You'll see lots of e-mail messages where people put a dozen exclamation points at the end of a sentence for added emphasis. Exclamation points are just another form of ending a sentence. If something is important it should be reflected in writing, not in punctuation.

8. Use smileys carefully - Smileys are simple strings of characters that are interspersed in the e-mail text to convey the writer's emotions (cues). A common example is :-). Turn your head to the left and you should see a happy face (the colon is the eyes, the dash is the nose and the parentheses is the mouth). Smileys are usually found at the end of sentences. Use them carefully because their translations are not universal (a miss-interpreted smiley could cause an angry response).

9. Use the appropriate salutation - In a non-business situation, simply use the person's name. You may also use "Dear" and the person's name (e.g., "Dear Virgil" or just "Virgil"). In a business situation, use the following as a guide: If you normally address a person as Miss/Mr./Miss/Ms. Smith then that's the way to address them in e-mail. If you normally call them by their first name then either omit the salutation or simply use their name or "Dear" and their name. If you are unsure, stick to the formal salutation. It's the safest bet.

10. Use a signature to identify yourself - Since it is not possible (yet) to sign your e-mail, users will sometimes include their name and company name (minus the signature) at the bottom of all e-mail messages. If your email address is a business address, include your title and company name in the signature. Normally, this might be part of a letterhead, but in the e-mail world letterheads are not used (wasted space). You will sometimes see a user's signature that contains a quote (as in "...the secret to life is that there is no secret.") after the person's name. This has become a fairly common practice. If you choose this option choose a quote that is a reflection of yourself. Keep it short. You don't want the quote to be longer than the message.

11. Continue the thread - Once you send that first e-mail, you will probably get a response. If you want to reply to that response what should you do? The wrong thing to do is to start a new e-mail message. This breaks the link (called a thread) between the original message, the response and your soon-to-be-created response. Without the link, it can get difficult for the users on each end to follow the sequence of messages, especially after several exchanges. The correct thing to do is to reply, which is essentially the same thing as creating a new message, but maintains the thread.

12. Use quotes - Nothing is more wasteful than to reply to an e-mail by including a complete copy of the original with the words "I agree", "Okay" or "Ditto" at the bottom. The correct method is to use quotes.

This is best explained by an example:

>*and do you agree with the proposal to hire Ms. Ross to handle our legal services?*

>>**Yes. Please make the necessary arrangements**.

Quoting can occur again and again as in the example:

>>*and do you agree with the proposal to hire Ms. Ross to handle our legal services?*
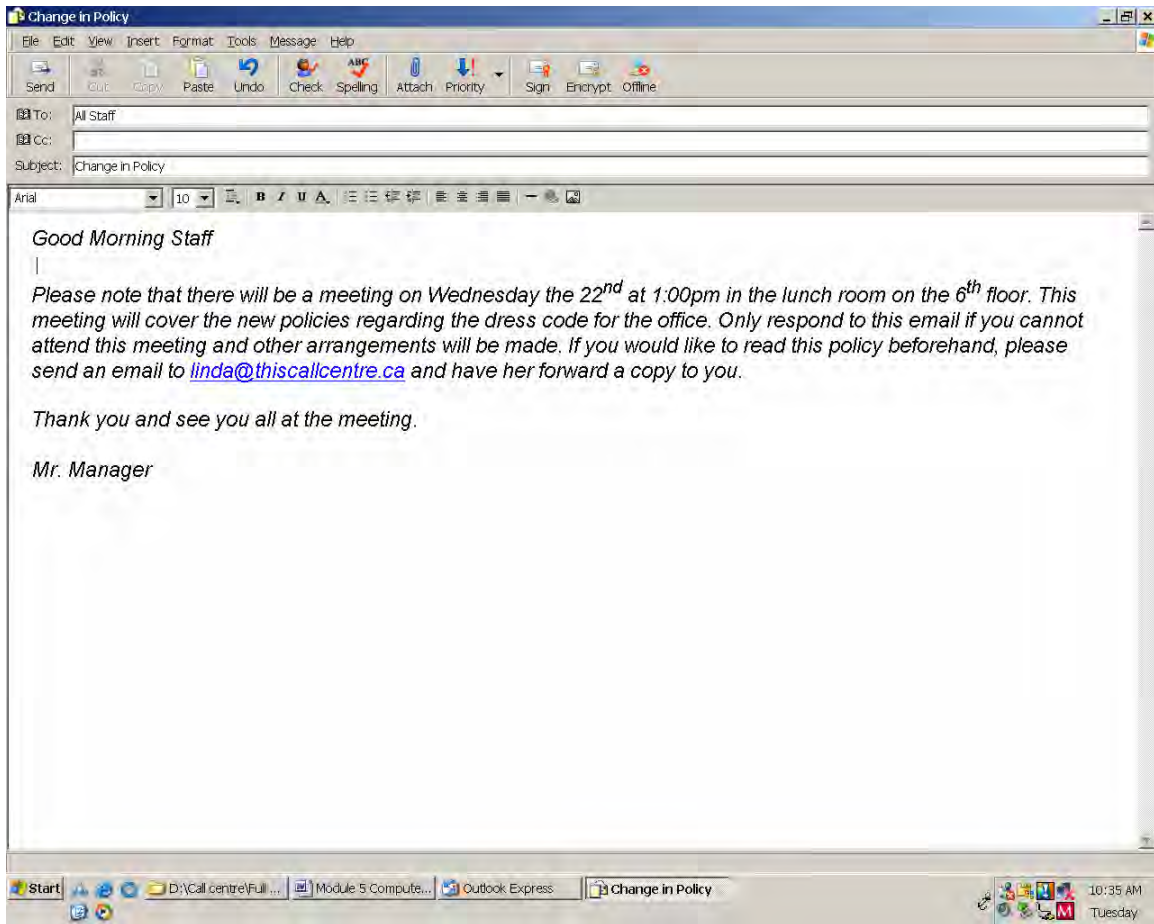
>**Yes. Please make the necessary arrangements.**

>>*Arrangements made. Our first meeting is scheduled for tomorrow morning.*

LEARNING ACTIVITY # 9

Read the following email and answer the questions using complete sentences.

1. Who is this message being sent to?
   _____
   _____

2. What is the subject of this email?
   _____
   _____

3. When and where will the meeting take place and what is it about?

    _____
    _____
    _____
    _____

4. Should you respond to the email to inform the manager you will be at the meeting?

    _____
    _____
    _____
    _____

5. How do you get a copy of the new policy?

    _____
    _____
    _____
    _____

QUIZ:
What do you know about Computer Skills?

The following questions are about the computer skills within the call centre industry in Ontario. Circle the letters beside the correct answers. In some questions, there is more than one correct answer.

1. Some examples of computer hardware are:
> a) monitor
> b) DOS
> c) scanner
> d) Solitaire

2 Some examples of computer software are:
> a) keyboard
> b) printer
> c) Windows 2000
> d) Microsoft Word
> e) mouse

3. A photocopier is an input device.
> a) false
> b) true

4. An ink jet printer is an example of:
> a) an input device
> b) an output device

5. All viruses are transported to your computer via Email.
> a) true
> b) false

6. You only need to run an anti-virus if your computer is already infected.
> a) true
> b) false

7. You don't need to use grammar, spelling or punctuation when writing a professional email.
> a) true   b) false

8. You should never write anything in the subject headline of your email.
    a) false
    b) true

9. When you are sending an email, you should:
    a) include profanity, offensive material, or any type of material which could be misunderstood.
    b) send unsolicited files that will take a long time to download
    c) overuse fonts, colours, smileys, clipart and graphics
    d) keep a professional or polite tone

10. You should always include your name, position and contact information at the end of every business email you send.
    a) true
    b) false

11. It is proper email etiquette to respond to an email with a one word answer such as "sure", "okay", or "no".
    a) true
    b) false

12. You need to be careful what you write in your email because someone other than the intended recipient may see it.
    a) true
    b) false

13. Application software allows you to control internal and external hardware.
    a) false
    b) true

14. An operating system is what interacts with and controls the applications.
    a) true
    b) false

15. A firewall is the last line of defense on your computer and does not really protect your system at all.
    a) false
    b) true

QUIZ:
What do you know about Computer Skills?

Name: _____

Date: _____

Score: _____

Module 6
Health and Safety

Important Laws Workers Need to Know

Employment Standards Act

The Employment Standards Act gives the minimum standards for salary, overtime, vacations, maternity benefits, termination and equal pay.

Occupational Health and Safety Act

The Occupational Health and Safety Act protects the health and safety of workers in the workplace.

Ontario Human Rights Code

The Ontario Human Rights Code forbids discrimination against a person because of race, colour, religion or sex.

Worker's Compensation Act

The Worker's Compensation Act helps workers who are injured at work or get sick from their work.

Real story

Mr. C & Ms. M – Telemarketers

A telemarketing company based in the Parkdale area of Toronto hired Mr. C and Ms. M. The company employed about 20 people to do "cold calling" – choosing numbers from the phone book and phoning people to drum up (get) business for a cleaning company.

Mr. C and Ms. M worked for the company at separate times. Each worked from 9:30 a.m. to 3:30 p.m., 5 days a week. They expected to be paid, but they were not, so they quit.

The company closed down. Mr. C and Ms. M are trying to get the wages owed to them through the Employee Wage Protection Fund.

The company seems to have opened up again under a new name.

Source: Parkdale Community Legal Services, Toronto

LEARNING ACTIVITY #1

Which one of the four Acts applies to the story, Mr. C & Mrs. M –
Telemarketers?

1. Employment Standards Act

2. Occupational Health and Safety Act

3. Ontario Human Rights Code

4. Worker's Compensation Act

LEARNING ACTIVITY #2

Instructions: Search for and go to the Ontario Ministry of Labour Web site
and find the answers to the questions below.

1. What is the minimum wage in Ontario for (call centre) workers?

2. How many weeks of vacation do most workers in Ontario have every year?

3. Is Remembrance Day a public holiday in Ontario?

4. How many public holidays are there in Ontario?

5. Can employers deduct income tax from your pay cheque?

6. How much vacation pay do most Ontario workers get?

7. How much is overtime pay?

8. When must workers have a meal break?

Vocabulary
minimum wage
coffee break
meal break
injury
injured
compensation benefits
overtime pay
public holidays
workplace standards
vacation
vacation pay
statutory holiday
payroll deductions
termination of employment
fire
quit

LEARNING ACTIVITY #3

Here is a pay cheque stub for two weeks. Fill in the pay stub with this information:

1. This person worked for 75 hours.

2. The regularly scheduled hours were 72.5.

3. The total pay before deductions was $915.00.

4. Canada Pension Plan contributions were $27.45.

5. Employment Insurance (EI) deductions were $18.30.

6. She received $45 overtime pay.

7. Union dues were $12.00.

8. Taxes deducted were $228.75.

			✦ Detach Cheque Here ✦				
EARNINGS			**DEDUCTIONS**				
Time		Gross pay	Income Tax		CPP		NET PAY
72.5 hr	2.5 hr						
$	$	$	$	$ 18.30	$	$12.00	$

Occupational Health and Safety Act

The Occupational Health and Safety Act gives workers three basic rights:

1. the right to know about health and safety hazards

2. the right to participate in keeping their workplace safe and healthy. Workers can give ideas and complain about problems

3. the right to refuse work that they think is unsafe.

> **By law, the Health and Safety Act must be posted in every workplace.**

Employers and workers must work together to identify and solve health and safety problems in the workplace.

LEARNING ACTIVITY #4

Identify the following tasks as an employer or worker responsibility by placing **E** (employer) or **W** (worker) beside the appropriate task.
An employer or worker must:

1. __ not work or operate equipment in a way that could be dangerous to themselves or anyone else in the workplace.

2. __ give workers the information, training and supervision they need to protect their health and safety.

3. __ help the health and safety committee representative.

4. __ use the safety equipment that their employer says to use.

5. __ keep safety equipment in good condition.

6. __ tell their employer if they see any broken equipment or safety devices.

7. __ make sure safe work procedures are followed and equipment is used properly.

8. __ report any violations of the Ontario Health and Safety Act to the employer.

Human rights

The Ontario Human Rights code protects workers in Ontario from discrimination and harassment by their employers or co-workers. It also reminds all workers to treat each other with respect.

Discrimination

Discrimination is what happens when you are treated differently from other people. It is against the law to discriminate against people because of the following:

- Where they were born (place of origin)

- Where their *ancestors* were born (ancestry)

- Ethnic group (*ethnicity*) (black/white, etc.)

- Religion

- Sex (male or female)

- *Sexual orientation* (heterosexual or homosexual)

- Age

- *Marital status* (married, single, divorced or separated)

- Children (yes or no)

- Receiving welfare or family benefits

There are situations in which the employer is allowed to choose on the basis of citizenship, age or handicap.

Harassment

Harassment is a situation in which someone threatens, bothers or insults you. Discrimination and harassment can occur in:

- job ads

- job applications

- job interviews

- the way your employer or co-workers treat you.

What to do in case of discrimination or harassment in the workplace

Racial harassment and discrimination include racial jokes and comments, whether they are directed at you or not. Sexual harassment or discrimination includes unwanted touching, comments, sexual jokes and suggestions.
If you feel that someone is discriminating against you or harassing you, get help. If a coworker harasses you, report it to your employer. If an employer harasses you, tell them that the behaviour is not welcome.
If the harassment continues, talk to your lawyer or community legal clinic. Ask about your rights and the "Human Rights Complaint Form."

LEARNING ACTIVITY #5

Match the type of discrimination with the definition.

1. __Place of origin	a) Single, married, divorced, common law
2. __Ancestors	b) Relatives from many generations back
3. __Ethnicity	c) Where you were born
4. __Sexual orientation	d) Caucasian, Asian, African
5. __Marital status	e) Heterosexual (straight), homosexual (gay)

LEARNING ACTIVITY #6

For each situation below, decide if the person is being discriminated against or harassed.
Then, match each situation with the type of discrimination or harassment.

1) __ Andy answered an advertisement for a "Girl Friday." The duties of the job involved typing, filing and sorting. When he asked for an interview, he was told that the job was for "girls" only.

> a) place of origin
> b) religion
> c) ethnicity
> d) race
> e) sex
> f) disability
> g) age

2) __ Nathan works in a machine shop. He is black. Most of his coworkers are white. Last week his co-workers were telling "black jokes." Nathan asked them to stop, but they just laughed and went on with the jokes.

3) __ Ameena applied for a job as a receptionist. Ameena is East Indian. She speaks English very well, but she has an accent. At the job interview the employer told her that she was not right for the job. He said that the company needed someone who spoke English with no accent.

4) __ Andrea is a stutters when she speaks. One of her co-workers makes fun of her when she stutters. He knows that this makes it harder for her to speak, but he does it anyway.

5) __ Ute has been looking for a job for almost two years. She can't understand why it is so difficult. Her friends say that it will be impossible for her to get a job because she is 52 years old.

6) __ Olivia has worked in a small factory for three years. She has never had a raise. Olivia is from the Philippines. When Olivia asked her boss for a raise, he said: "You Filipinos are all the same. You take jobs away from Canadians, and then you want a raise too".

7) __ Ahmed is a Muslim. He has a special prayer time every Friday. Every Friday one of his co-workers teases him: "There goes Ahmed to the mosque again!"

Adapted from: Discrimination and Harassment at Work, CLEO. August, 1993

Health Concerns in Call Centres

The main health and safety concerns in call centres are *work-related* upper *limb disorders* (RSI), voice loss, stress and a feeling of being *cooped-up*. To avoid voice loss, call centre workers should drink plenty of liquids. Since regular movement can reduce *body fatigue*, workers should *periodically* get up and stretch.

Comfort is even more important in a call centre than in a normal office situation. Temperature needs to be at comfortable levels with no cold *drafts*.

Wrist Injuries

The main form of wrist injury, often caused by keyboarding, is called *carpal tunnel syndrome*. It must be treated by exercise or by seeing a doctor, or you could be permanently injured.

Try to tap the keyboard instead of pounding it. Practice typing with a light touch. You may tend to type harder when you're tired, hurried or under stress. Pay extra attention to your keyboard force at those times.

Check your posture. Keep your wrists relaxed but not bent upward or downward. Be sure your monitor is at eye level or a little below. Make sure you are in a comfortable position.

Don't drink too much coffee or tea. Caffeine can cause increased tension, resulting in increased force when using the keyboard.

Pain, stiffness, burning, or numbing in your hands or arms are signals that something is not right. If you have pain, see your doctor, and you may avoid more serious injury.

The stages of carpal tunnel injury

Stage One

1) Pain and fatigue near the end of the day.
2) Symptoms ending overnight and on days off.
3) No reduction in work or school performance.

Stage Two

1) Recurring pain and fatigue earlier in the day.
2) Night symptoms causing sleep disturbance.
3) Reduced work capacity.
4) Physical signs such as swelling.
5) A nerve-conduction study, or other medical tests, showing injury.

Stage Three

1) Pain and fatigue even during rest and non-repetitive movement.
2) Nighttime pain causing sleep disturbance.
3) Reduced work capacity.

Danger signs

1. Numbness, tingling or burning sensations.
2. Persistent symptoms.
3. Pain-related behaviour, such as frequently massaging yourself, or pain when someone touches you.

Suggestions

You should do a five-minute exercise warm-up before starting computer work, just as athletes stretch before a game, to prevent injury.

You should also stretch and bend your arms, shoulders, and back before starting computer work.

LEARNING ACTIVITY #7

Listen to the instructor. Mark the syllable stress in these words and phrases, then practice saying each one.

periodically   work-related   body fatigue
limb disorders   carpal tunnel syndrome   cooped-up

LEARNING ACTIVITY #8

1. What are some signals that something is wrong with your hands or arms?

2. How can you protect your wrists from injury?

3. What happens if you drink too much coffee, tea, or cola?

4. Is it good to pound the keyboard?

LEARNING ACTIVITY #9

Try this exercise in class:

1. Extend and stretch both wrists and fingers bent upwards as if they are in a handstand position. Keep that position and count to five.

2. Straighten both wrists and relax fingers.

3. Make a tight fist with both hands.

4. Bend both wrists down while keeping your fists closed. Keep that position and count to five.

5. Straighten both wrists and relax fingers. Keep that position and count to five.

The exercise should be repeated ten times. Then you should let your arms hang loosely at your side and shake them for a couple of seconds.

Ergonomics

Ergonomics is the process of matching the job to the worker so they can perform their duties without any unnecessary strain.

Ergonomic hazards that should be addressed are the following:

- Awkward working positions

- Forceful movements

- Repetitive movements

- High pace of work

- Temperature extremes

- Vibrations

The most common avoidable mistake in an office setting is not adjusting the workstation to fit the individual worker. Here are the things that must be done to ensure a healthy working environment.

Body position

There is no single body position that is recommended for sitting. Every worker can sit comfortably by adjusting the angles of their hips, knees, ankles and elbows. The following are general recommendations. Occasional changes beyond given ranges are acceptable and sometimes beneficial.

- Keep the joints such as hips, knees and ankles open slightly (more than 90°).

- Keep the upper body within 30° of an upright position. (see next diagram)
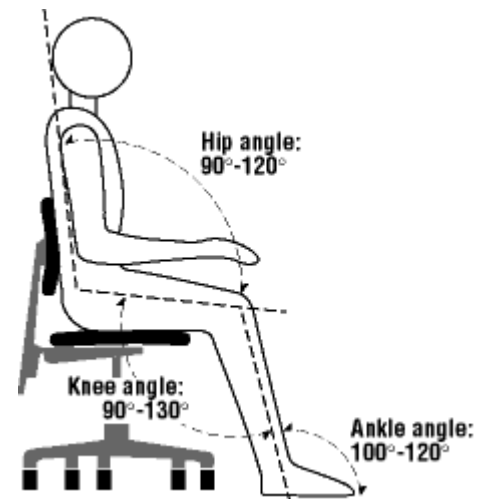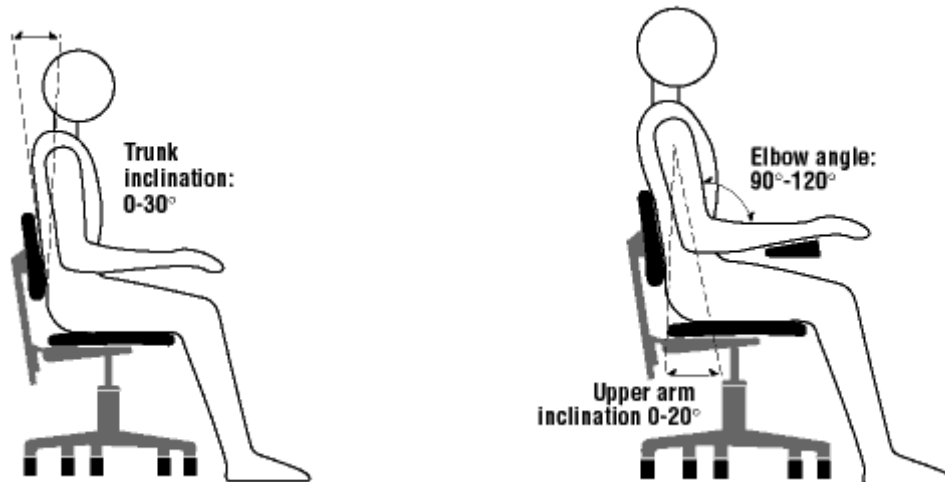
- Always keep the head aligned with the spine.

- Keep upper arms between vertical and 20° forward.

- Keep elbows at an angle between 90° and 120°.

- Keep forearms between horizontal and 20° up.

- Support the forearms.

- Keep the wrists straight and aligned with the forearms.
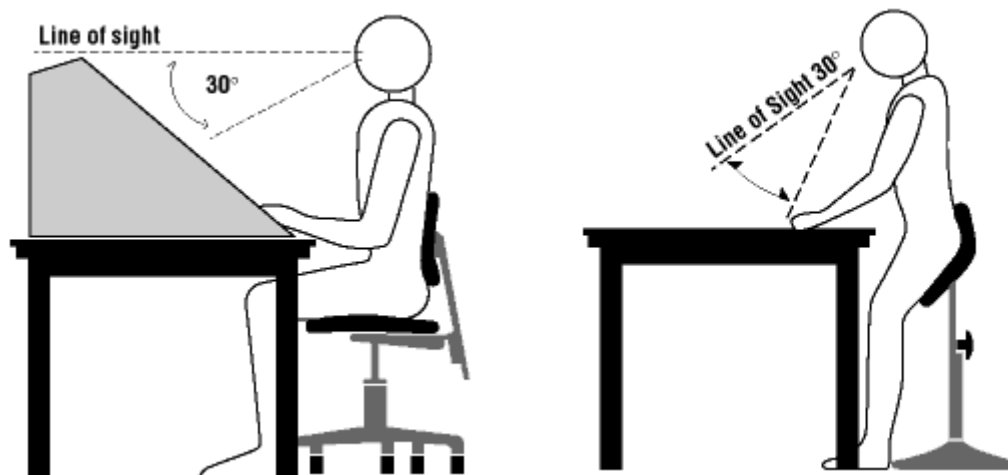
Place the working object so that it can be seen at viewing angle of 10° to 30° below the line of sight.

The Monitor

Common complaints among computer operators include discomfort, aches and pains in the neck and shoulder, but also eyestrain. The sheer number of such complaints indicates that the proper position of the monitor has not received enough recognition as an important factor in the arrangement of a computer workstation.

Pain and discomfort result from the effort to view the monitor when it is set at the wrong place in relation to the operator's position. Two factors come into play: viewing angle and viewing distance. Viewing angle refers to the degree above or below an imaginary horizontal line at the level of the viewer's eyes and the centre of the object being looked at; in the case of computer work, is the centre of the screen. – See Figure 1. Viewing distance refers to the space between the operator's eyes and the screen. – See Figure 1. Clearly these factors are critical for correct placement of a computer monitor. A poor angle leads to postural (neck and shoulders) discomfort, while the wrong distance can contribute to eye strain.
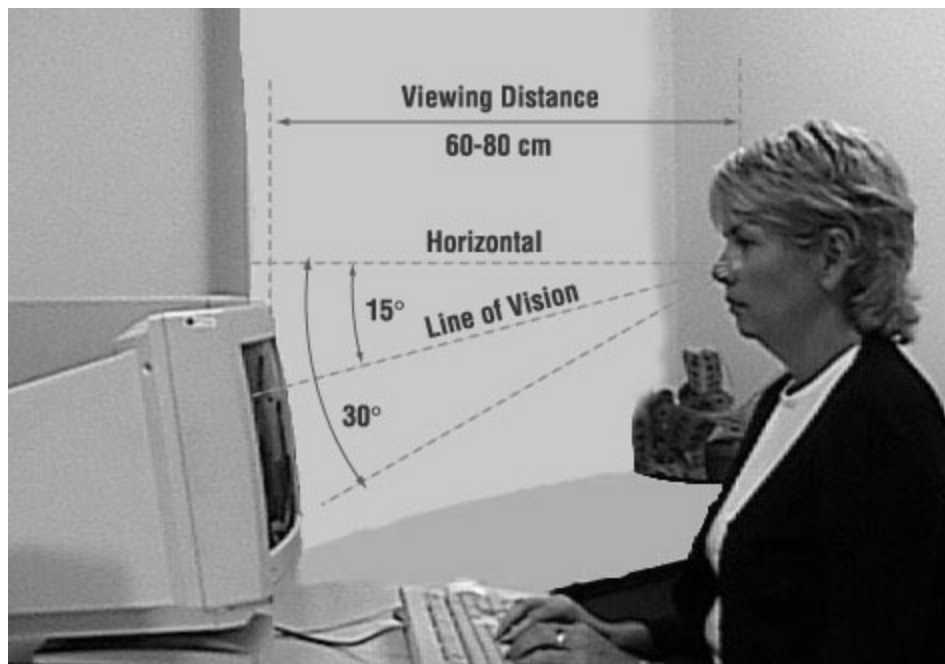

Figure 1

The Mouse

The mouse is a common piece of computer equipment which helps people use computers more quickly and easily. Since the introduction of Windows technology in the 1990s, which made mouse-intensive software popular, the mouse has become standard office equipment.

There are two reasons why using a mouse regularly can be hazardous.

First, using a mouse requires a person to make small, exact movements with their hand, fingers, and thumb. By positioning, traveling, scrolling, and clicking the mouse again and again, the same small muscles can become tired and overworked. This can cause:

- Pain (ache, soreness) on the top of the hand (Figure 1)

- Pain (ache, soreness) around the wrist (Figure 1)

- Pain (ache, soreness) along the forearm and elbow (Figure 1)

- Formulation of painful nodules, and in the later stages, ganglion cysts, around the joints and along the tendons

- Numbness and tingling in the thumb and index finger that may develop into Carpal Tunnel Syndrome (CTS)

Figure 1

The second reason using a computer mouse can be hazardous is that the placement of the mouse can make it awkward to reach. Many computer workstations have limited space; since the keyboard is already directly in front of the person using the computer; most times the mouse is placed around the upper right hand corner of the keyboard and toward the back of the desk (Figure 2).

Figure 2

When the mouse is in this position (Figure 2), it is out of 'easy reach': it is beyond the safe distance range for comfortable hand movements. In order to use the mouse, the person has to reach their arm outwards and forwards and hold it there unsupported for as long as they are using the mouse.

Designing a computer workstation which lets a person use a keyboard and a mouse (or other input devices like trackballs or graphics tablets) at the same time can be very difficult.

The complete elimination of aches and pains may not be possible, but choosing the right mouse, positioning it properly, and being aware of how you are holding your body and using your muscles can all help.

Workers' Compensation

The Workplace Safety and Insurance Board (WSIB), formerly the Workers' Compensation Board, gives compensation to workers who are injured on the job or who get sick because of their work.

No injury is too small to report!

If a worker misses work because of an injury or illness, the employer must report it to the WSIB. The worker must also report to the WSIB.
If a worker has an injury related to his or her job, they must always apply for workers' compensation.

The WSIB decides if the law covers a worker or not. Workers must report their injury to their employer immediately. Workers must also make a claim with the WSIB within six months of their injury.

LEARNING ACTIVITY #10

Write "compensation" or "accident" beside the appropriate phrase and then practice saying the complete sentences.

Workers can get *compensation* benefits for…

Workers who have an *accident* on the job should…

1. _____	some of their lost wages
2. _____	stop working
3. _____	ask for first aid
4. _____	tell their supervisor or employer
5. _____	if necessary, see a doctor right away
6. _____	payment for pain and suffering
7. _____	labour-market re-entry assessment and planning
8. _____	make sure that the employer knows that they have been injured
9. _____	make sure the employer writes down everything about the accident.
10._____	transportation costs to their doctor or therapy
11._____	health care costs

Terminology

Call Centre Terminology

The following words provide general codes for call centre workplaces. Individual centres may offer new or different terms. (If you have access to a computer, use the Internet to search for the words: "call center terminology.")

Agent: a call centre employee.

AHT, Average Handle Time: the average amount of time an employee takes to handle calls. The employer wants this as low as possible. The employer is paid a flat rate by the call no matter how long it takes. The longer it takes, the less profit to the call centre.

Asking Questions: the employee uses this tool to get real information and to calm the customer.

Assurance: the customer must be told that you are on their side. You are there to help them with their issue or refer them to someone who will.

Borders, boundaries: Each job has a contract or rules that must be followed to serve the customer. The contract has borders, which the employee must honour. For example: if the client is getting information about a piece of software but they ask a question about their hardware that is not within the borders of their service agreement, the employee must not (is not obligated to) answer the question because it does not fall within their contract.

Call Control: the employee is required to always keep control of the call. Remember that the employee is the one with the knowledge and the customer is the one with the problem. The customer needs the employee to satisfy their needs, so the employee maintains control of the call for a positive outcome.

Call Dumping: getting rid of the customer, maybe by giving them a long computer task and telling them to call back if help is still needed.

Calls Recorded: all calls are recorded.

Call Tracking: using phone surveillance or a Data Base Profiling System. Call may be assigned a number and cross referenced to see how many calls are needed to solve the problem.

Call Volume (CV): the number of incoming calls, which can vary greatly and also the number of calls handled.

Caving in: giving in to the customer; giving extra information free or giving information that is outside the contract. In other words, working for nothing or giving freebies.

CIA, Customer Interaction Agent: a job specific term for an employee/phone worker.

Client: the company that contracts the services of the call centre. A call centre can have many clients.

Closing: asking the customer to purchase a product or service and making the sale (e.g. up-selling).

Codes: letters used to record items like meetings, training, etc. on computer logs.

Contact number: Phone number.

Contract: the specific job you are doing. The employee is assigned to work on one contract only, to do a specific job. Each job has a criteria and terms of agreement. It is the employee's responsibility to stay within the contract.

Customer: The person who calls the call centre to get help.

Data Base Profiling System: computer system used to track calls and improve productivity.

DFFR: Debug, F disc, Format, and Reinstall. This is a technique to dump the customer, who will be occupied for a long time and have to hang up to do the procedure. Not a good thing!

Direct Approach: the employee uses an assertive manner to move the call forward when the customer is stuck. This can be used to resolve items or close sales.

Employee, Agent, CIA: the call centre worker.

Employer: the call centre.

Escalations: problems with call control and anger management. Employees may be penalized for every escalation that they cause or allow.

EQS, External Quality Service: the client will contract an outside company to randomly monitor and evaluate call centre service.
Flat Rate: the fixed amount of money a call centre receives from the client for each call. This does not include extra money earned for up-selling.

Free Options: self-service website used as a last resort (another way of dumping).

Friendly Reminder: asking the customer to do something NOW. Getting the customer to take action. For example: ask the customer to go ahead and get their VISA card or ask the customer to press Control/Alt/Delete right now.

FCR or FTR, First Call/Time Resolution: solving the problem in a single call. No follow-up is required and no replacement parts are sent out. (What the client wants.)

Handle time: the actual time a call takes.

Hard Reset: having the customer reboot their whole computer or start from scratch. This is another way of dumping the customer because the call is taking too long or is out of the control of the employee. (Also see DFFR.)

Hiring Blitz: a mass hiring. These occur when a new call centre opens and again as people leave and need to be replaced.

Humour: being light-hearted or mildly witty will help both parties, if it is done appropriately.

Idle Time: time when the employee is not on the phones and not productive. The employee could be at a meeting or in training but they are logged as 'idle'.

Incentive: a bonus or reward given to an employee for selling a certain amount or reaching a high level of production.

Incoming Calls: calls made by the customer to the employee.

Key to Success: "I remember that I am in control. The call centre pays me to sit and talk on the phone. I always know that the person on the other end must listen to me to get what they want!"

KISS Principle, Keep It Short and Simple: customers will do better if things are direct and very simple. They will probably not have the same language or skill level as the employee.

Legend: a script that explains the goals of the client. For example: the client may want customers addressed by their first name only, 3 times during a call. The employee uses the legend to remember the client criteria.

Listening: attending carefully and deeply to the customer's real needs and the details of the "issue."

Logs: employees keep a record of their calls.

Maintaining Focus: the employee remembers she is in control and the customer's ideas should not be taken personally.

Managers: "mentors."

MCCI: a manager of call centre interaction. May vary according to the company.

Mentors: managers, people who train and supervise the employee.

Metrics: the numbers used or measured against to analyze productivity. For example, your call centre will measure its CV against all call centres or an employee's AHT will be measured against the AHT of their section.

Non-confrontation: the employee is not aggressive with the customer. Aggression results in escalation, which spoils the call and causes penalties.

OJT, On the Job Training: Employees are trained as they work.

Options: free service on the website. Call centres do not get paid when customers use free options, so employees will only use this as a last resort, to 'dump' or redirect a difficult client.

Outgoing calls: calls employees make to customers.

Outbound Telemarketing: calls made to sell products or services.

Outsourced Call Centre: a call centre that is sub-contracted by, to or from the call centre you work for. For example, you may be outsourced to handle calls from another centre or a different call centre company. The customer may have passed through several centres before they are passed on to you. The customer may have been handled by several people or have been waiting in queue for a long time before you get them.

Package: a value-added, up-selling service contract or advanced agreement that will profit the call centre as well as the customer.

Penalties: employees may receive some form of punishment for mishandling calls.

Personal Call Volume: the number of incoming calls that you are able to handle on average. An employee might handle 20 calls per shift, according to their assignment.

Personal Time: bathroom breaks, personal phone calls.

PIP, Performance Improvement Plan: employees may be evaluated according to their initial and subsequent performance. If the employee does

not improve or meet a quota of calls, the employer may reprimand them or use progressive discipline.

Politically Correct Language: language that is polite and inclusive (does not exclude anyone or put anyone down) and is neutral for ability, age, gender, race etc. (respectful of diversity).

Positive Closure: asking the customer if they are happy with the service after the transaction is complete. This leaves the customer on an upbeat note.

Positive Language: the employee may look for ways to ease or diffuse calls by using gentle, non-threatening language. For example, the employee could substitute the word "problem" with the word "issue."

Praise: the employee looks for opportunities to give positive feedback to the customer. This may motivate the customer and help them deal with anxiety, frustration, etc. It may also create cooperation for a speedier resolution of the call.

Progressive Discipline: a series of warnings about performance, beginning with verbal warnings and increasing to written warnings, interviews, suspensions and termination (firing).

Queue: (pronounced 'Q') a line up of customers who are waiting in order.

Ramping up: getting established; becoming experienced and productive.

Reading the customer: with practice, the employee may learn to understand and predict the customer's mood, problems and outcome. This will improve success and satisfaction for both parties. (Useful throughout life.)
Relationship Lead or Leader: another term for manager.

Script: the written words and sentences an employee must use to handle calls according to the specifications of the client.

SDM, Service Delivery Manager: a top team manager. This type of term will vary with each unique call centre. This person will probably go out and find contracts with clients to keep the call centre in business.

Service Contract: the manufacturer's original agreement, which can be changed without notice. For example: the customer may have a full parts and warrantee contract. If the manufacturer decides the service is too expensive, they may change the terms of the contract. The contract may also expire and the customer may purchase a new contract.

Site Call Volume: the number of incoming calls that a call centre can handle compared to other call centre locations. (Belleville has one of the best records, due to the number of skilled workers and the generally agreeable manner of employees.) A call centre might receive 1000 calls per day.

Smile: it comes across in your voice. (Also see humour.)

Staggered Hours: shifts may be split up during the day. A person may work 9-12 and 4-8 and they take meals on their own time.

Stalling: the employee keeps the customer waiting if he is out of control. They may make an excuse to look for information, call the manager, etc. The customer may be put on hold or lead into a side discussion to diffuse the situation.

Stretching: body movement to prevent stress and improve well-being. Also used to describe a stalling technique.

Talk Ratio: the time on the phone. A high talk ratio is good and it includes listening. This means more time is spent on the phone with the customer than in other activities like idle time.

Ticket Number: the number assigned to a customer issue that will track through the system by being recorded in the data base and pulled up with each successive call.

Times per hour: the number of calls and the length of the calls that you can produce in one hour. After you become trained and experienced, you will expect to change your times. You will increase your number of calls and decrease the length of each call. For example, when you start you may complete 2 calls per hour and take 27 minutes to complete a call. After a few weeks you will expect to take 12 minutes for a call and complete 4 calls per hour, doubling your productivity and reducing your AHT by half.

TS, Team Supervisor: the employee's boss.

TSC, Technical Support Contract: a package for service that the customer may purchase for long-term care and savings. This may be a profitable up-sell for the employee.

TSS, Tech Support Services: the free or fee per call service to the customer.

Two Masters: the employee has two masters; the client who wants FTR (First Time Resolution) no matter how long it takes and the (call centre) employer wants high CV.

Up-selling: offering additional products or services to the customer to increase sales and/or satisfaction of the customer. For example, a customer may order a set of books. You may then offer them a rack or binder to keep them in. Another example is the customer may have a service problem and there is a charge for each service call. You may sell them a service contract so they call have unlimited service for a period of time.

Venting: the client needs time to blow off steam when they first call. The employee listens carefully and lets them vent so they are ready to get to work on the item.

Walking in: coming in 100% prepared; being ready to function on day 1.

Weeding out: eliminating employees who are not suitable or not productive in a call centre context.

Yelling: the customer is shouting, abusive and out of control. The employee may wish to park, stall or dump this customer. They may also use the 3 Strike Rule.

Compiled by C. Marks 2003