



### Competencies that are addressed:

#### PRIMARY COMPETENCY CATEGORIES:

- **Customer Acquisition—**  
Identifies and converts prospects who should be doing business with us into customers who are champions for our organization.
- **Customer Experience—**  
Creates an environment with customers to maintain a positive long-term relationship. Leverages positive experiences to create customer loyalty and a desire for them to be a champion for our organization.

#### RELATED COMPETENCY CATEGORIES:

- **Attitude—**  
Maintains a friendly, positive, and enthusiastic outlook.
- **Interpersonal Skills—**  
Displays a consistent ability to build solid relationships of trust and respect inside and outside the organization.
- **Communication—**  
Advances the abilities of individuals and the organizations through active listening supported with meaningful oral and written presentation of information.

# Telephone Skills: Outbound

## SUMMARY

Outbound phone calls are made for a variety of reasons, including selling, conducting surveys, service follow-up, promotions, prospecting, and responding to inquiries. People receiving these calls will be more receptive when we learn how to use engaging telephone techniques, handle rejection, and apply a call purpose outline that motivates the receiver to engage in a conversation.

## CONTEXT

Customer service professionals are sometimes reluctant to make calls. They don't like to think of themselves as an intrusion, and have to deal with rejection a large percentage of the time. Worse still, people are getting harder to reach. Just because you have their phone number or their e-mail address doesn't mean they want to hear from you.

Conducting yourself in a friendly, professional way in outbound call situations is one way that you can differentiate your organization from your competition. Looking at each interaction with a customer as a defining moment that can make or break the relationship sets a context for the skills in this module. You will look at ways to streamline the process and make your results more predictable so that you can repeat success.

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### At the completion of this module, participants will be able to:

- Determine "Defining Moments" when customers form lasting positive or negative opinions of your organization
- Improve customer interactions to exceed their expectations
- Use principles for outstanding outbound telephone effectiveness
- Gain credibility by using Call Purpose Outlines

*"We have 50,000 moments of truth everyday, each of those in which a customer comes into contact with any aspect of the company, however remote, and thereby has an opportunity to form an impression."*

—Jan Carlzon