

module one: customer service

Greetings and First Impressions

article:

Transitions That Work

by Laurie Guest

One area that receives the lowest scores when we conduct a guest encounter audit is the lack of smooth transitions. Imagine a track relay team. One runner has the baton. As he approaches the next runner, they stride in unison for several lengths. He then passes the baton without losing stride. What does this look like in a business setting?

When a Transition Does Not Work

Follow a couple into a bank. They are greeted by a teller at a teller window, and they explain that they want to see a loan officer about buying a car. They share the story of car shopping with the teller who nods, smiles, and listens. However, when she phones the personal banker, she only says, “Somebody’s here to see you.” A failed transition is a dropped baton.

When a Transition Works

Again, our couple enters the bank. A teller calls the personal banker and says, “I have a couple that would like to see you. Are you available?” She then escorts them to the office and makes a transition introduction, “Amy, I’d like you to meet Ted and Martha Brown, clients of ours, and they would like to talk to you about a car loan. Ted and Martha, this is Amy Thompson, one of our personal bankers, and she will be happy to provide the information you need.”

If the teller is unable to leave the counter, then the same message can be communicated by phone without the formal introduction. When the personal banker comes out of the waiting area to greet the clients, she needs to communicate that the baton was passed. “Good afternoon, Mr. and Mrs. Brown. I’m Amy Thompson, your personal banker. Please follow me to my office.” Once in the confidential space, she continues, “Mary tells me you’re interested in getting a car loan, and I’m happy to help you with this.” A successful transition is a smooth baton pass and positively impacts the guest encounter.

Another successful transition occurs in an optometrist’s office following an eye exam. Instead of just bidding the patient goodbye and walking out of the room, the doctor escorts the patient to the optician. Since this is the team member who

will help the patient select and purchase the eyewear, it’s important that a transfer of trust happens. The doctor should say something like, “Ms. Patient, allow me to introduce you to Kelly. She’s the expert around here on finding the perfect frame for the shape of your face. You are in good hands. We’ll see you next year for your annual checkup. Okay?” A transition that works leaves a favorable impression.

Transitions by phone are also important. Have you ever called somewhere knowing that the first person who picks up is not going to be the person to answer the question you have? In order to transfer you to the right person, they ask you to tell the long version of what you need. When you’re done, they say, “One moment. Let me connect you.” Then you have to start all over.

Better service would sound like this: “After getting enough information from you, I’m going to call and give a summary to the staff person who’s going to help you.” After the staff person makes a smooth baton transition, the next person in line to take care of you would say, “Mrs. Larson, this is Kelly in the billing department. Mary tells me that you have a question on your last statement. I have it pulled up here on my screen. Let me just confirm that I have the right account, and we’ll see where that extra charge is coming from.” That is a smooth transition.

Put Transitions in Place

Put professional plan transitions in place using this starter kit. First, you introduce yourself. Next, you recap the situation in one to two sentences. After the recap, you put positive positioning in place (See Positive Positioning article). You then give a head nod in confirmation that the information exchanged has been accurate. Finally, you smile and make your departure. Sound simple? Just follow the steps.

However, if your team is not accustomed to proper transitions, you may need to have a few practice sessions. Work to find the right sentences to use and make sure that every team member understands his or her role in the pass off. Soon it will be second nature in your sales process, and the positive customer service reviews will increase.