Customer Service Panel

Panelists:

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Moderator:

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"In everything, do to others what you would have them do to you."

THE GOLDEN RULE

Customer Service

Customer Service is Selling!

How do you identify different types of clients in a transaction?

- Lender
- Realtor
- Buyer
- Seller
- Attorney

Don't be afraid to ask! View the Purchase Agreement or Lender Order

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Email Etiquette

5 C's of Email Etiquette:

Clear

Be clear about your message!

- Cohesive
 - Stay on topic
- Complete
 - Complete your idea "Thanks Suzy, I have added the price addendum to our file and will send out an update commitment shortly" vs. "Received".

Concise

- Eliminate unnecessary words
- Concrete
 - Use precise words. Avoid using acronyms. Don't assume the reader knows what you think they should know!



Email Etiquette

- PROOFREAD! Then, proofread again!
- Use proper email punctuation
- Know your audience
- Practice good grammar
- Choose your salutation carefully
- When to "Reply All"/Forward/Escalate
- Delayed responses/error acknowledge your delay or error!

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Phone Etiquette

- When to use the phone vs. email
 - Difficult conversations
 - Complicated conversations
 - Time-sensitive matters
 - Follow-up with email summarizing discussion



Phone Etiquette



 Give the other person time to process – be comfortable with small bouts of silence.

How to handle conversations that get off track? Why did the conversation get off track?

- Is the person getting defensive?
 - Defensiveness = feeling "unsafe" they don't feel like you are coming from a place that has their best interest at heart.
- Know when to end the conversation!
- Be comfortable admitting you don't know the answer to something and committing to finding it and returning the call when you've found the answer.



START STRONG



Introduce yourself.

By putting a name to your voice, you set the stage for connection and understanding.





Speak clearly, not too softly or too quickly.

Enunciation is everything, especially when speaking with callers who are elderly or hard of hearing.



LISTEN ACTIVELY

SUMMARIZE



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ASK



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CONVEY

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Avoid interrupting the caller. Practice patience, even when the person on the other end of the line

themselves.

o customer, get straight to the paint - you don't want to waste anyone's time.

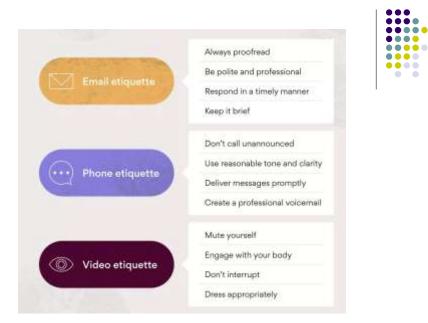
PHONE ETIQUETTE MUSTS

Practice empathy above all, Imagine this caller is a friend or middles who is in need of support and front them how yourd want your loved one to be treated.



Be patient, especially when speaking to older collers or those whose first language isn't English. It's impossible to snow the story of every perion you talk with, an give hills the benuft of the doubt whenever you cars.





Read the Room!

- How do they like being referred to?
- Pick up on small cues/body language
 - Do they shake hands?
 - Do they have a nickname?
- What happens if you offend someone?
 - Immediate apology, empathy, sincerity
 - Follow up with handwritten note
 - View the situation in retrospect how could it have been avoided?
 - How could you have handled communication throughout the situation better?

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Own Your Mistakes!



What happens if you make a mistake?

- Own It
 - You can't learn anything from, a mistake until you admit that you've made it.
- Reframe the error
 - How you view your mistakes determines the way you react to them and what you do next.

Analyze

- What could you have done differently?
- What can you do to fix the situation?
- Put lessons learned into practice
 - Mistakes are opportunities to learn and grow!



Tailor the experience

Each experience should be tailored to your client's preferences!

- What they want vs. what you think they want
- Concierge list have your customer fill out their preferences



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"Do unto others, whenever possible, as they would want to be done to them."

THE PLATINUM RULE