

# Customer Service Panel

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*“In everything, do to others what you would have them do to you.”*

## THE GOLDEN RULE

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## 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!

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## 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

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## 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.

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**BUSINESS PHONE ETIQUETTE TIPS**  
— FOR THE MODERN AGE —

YOU DON'T GET A SECOND CHANCE AT A FIRST IMPRESSION.

Since every phone call is a new opportunity to win over a customer, it's important to deliver on caller expectations while delighting in unexpected ways.

The graphic features an illustration of a person wearing a headset working at a computer. Below the main text, there is an illustration of two business professionals, a man and a woman, both wearing headsets, standing next to a large screen displaying a question mark and a speech bubble.



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# 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.

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## Focus on the call/avoid distractions.

Multitasking is incredibly inefficient, and callers can always tell when they aren't getting your full attention.



## LISTEN ACTIVELY



### SUMMARIZE

Just repeat back what you've heard. This simple strategy can help ensure you're staying focused on the conversation instead of just waiting your turn to speak.



### ASK

Follow-up questions. Clarification can save serious time and energy for both parties.



### CONVEY

Just plain or action-based words into your gathered. Callers like to be part in the loop and may even offer insight into possible solutions.



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## — FOLLOW — THE GOLDEN RULE

Facilitate the kind of call you would want if you were calling a business. Keep kindness at the forefront of every conversation.



**YEP**  
**NO WAY**  
**LOL**

Skip the slang...and the jargon. Don't be too informal, and while overly technical language might sound impressive, it can alienate callers who aren't familiar with such terms.

**!** **Avoid putting callers on hold.**  
Nobody likes to wait. Some callers may even opt to hang up and dial your competitor while you're away from the conversation.

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## PHONE FAUX PAS

**Finish snacking before picking up the phone.**  
Even the most discreet munching can be heard by callers.



**STOP**

**Avoid interrupting the caller.**  
Practice patience, even when the person on the other end of the line is talking slowly or repeating themselves.



**Leave succinct messages and voicemails.**  
If you have to leave a message for a customer, get straight to the point - you don't want to waste anyone's time.



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## PHONE ETIQUETTE MUSTS

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**Practice empathy above all.**  
Imagine the caller is a friend or relative who is in need of support and treat them how you'd want your loved one to be treated.



**Be patient, especially when speaking to older callers or those whose first language isn't English.**  
It's impossible to know the story of every person you talk with, so give folks the benefit of the doubt whenever you can.



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 <b>Email etiquette</b>	<ul style="list-style-type: none"> <li>Always proofread</li> <li>Be polite and professional</li> <li>Respond in a timely manner</li> <li>Keep it brief</li> </ul>
 <b>Phone etiquette</b>	<ul style="list-style-type: none"> <li>Don't call unannounced</li> <li>Use reasonable tone and clarity</li> <li>Deliver messages promptly</li> <li>Create a professional voicemail</li> </ul>
 <b>Video etiquette</b>	<ul style="list-style-type: none"> <li>Mute yourself</li> <li>Engage with your body</li> <li>Don't interrupt</li> <li>Dress appropriately</li> </ul>



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## 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!

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# 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



## Customer Preference Sheet

Brakeage

Agent Name

- Prefer to be called

Assistant Name

Business Partner

Preferred contact method

- Call
- Text
- Email

Contact buyer/seller directly?

Preferred Close

- Second choice if preferred not available

Closing package preference

- Copy package
- Email package

Notes:

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*“Do unto others, whenever possible, as they would want to be done to them.”*

# THE PLATINUM RULE

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