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About Telephone Doctor, Inc. Customer Service Training

Telephone Doctor, Inc. is a St. Louis based customer service training company that offers products and techniques designed to improve the service skills of customer contact employees. Through DVDs, web-based courses, books, audio programs and instructor-led workshops, Telephone Doctor, Inc. has helped tens of thousands of organizations increase revenue, improve customer satisfaction ratings and reduce employee turnover. For additional information, please visit www.telephonedoctor.com.

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The Goal of the Course: *Email Matters - The Art of Better Service*

This Email Matters series consists of 19 effective chapters. Email communication is a fundamental component of everyday business life. Email is so ubiquitous that it can be easy to forget that it has only been with us since the mid 90s. While most team members know how to send and receive email messages, there are dozens of important nuances which can make the difference between your customers and coworkers getting mediocre service vs receiving top of the line treatment. Each module takes about 8 minutes to complete.

The goal of this series is to present trainees with various workplace email communication challenges and help them to develop the skills and techniques to turn these challenges into opportunities for delivering stellar customer service.

**Objectives:**

In support of the above goal, participants who have successfully completed this course will be exposed to written, verbal, and/or skill practice exercises, to improve email communications.

- Synchronous vs. Asynchronous communications
- Subject Line
- Address Fields Opening and Closing Lines
- Composing a Message
- Proofreading
- Message Length
- Writing With Conviction
- Jargon and Shortcuts
- Respond Promptly
- Confidentiality
- Handling Irate Customers
- Replying to All
- Humor in Email
- Tools for Emphasis
- Authoring Emails When Angry
- Internal Customer Service
- Inappropriate Topics
Training Outline: Email Matters ~ The Art of Better Service

I. Introduction to the Topic (See “The Goal of the Course” on page 3) (3 min.)
   A. State the goal of the course in your opening comments
   B. Include the class objectives

II. Getting Acquainted (see “Before You Begin: Tips for Trainers” on pages 5-6) (15 min.)
   A. Introduction of trainer
   B. Use an icebreaker activity or buy-in activity

III. View Program: Email Matters (Varies with teaching method)

IV. Application of Discussion Questions (15 min.)
   A. For each question:
      ♦ Review and discuss responses provided in the Leader’s Guide
      ♦ Optional: Use corresponding Skill Practices

V. Wrap Up (see “Before They Go” on page 40) (15 min)
   A. Select method of review
   B. Use a commitment activity
   C. Ask participants to complete evaluation

NOTE: The normal total length of this class is approximately 2 hours and 30 minutes using the questions only. For each Skill Practice activity included in the session, increase the total length of the class by approximately 10-15 minutes. For example, if using Skill Practices #1, 3 & 5, the total length of the class is approximately 3 hours. Depending on the time available and with some imagination, the training can be as short as only watching the program or extended to a full day session.
Before You Begin: Tips for Trainers

To help participants receive the maximum benefits from this course, here are some tips for success:

Assemble Learning Resources

- Locate DVD program *Email Matters ~ The Art of Better Service*
- You’ll need:
  
  A flip chart, or white board and markers, or chalkboard and chalk. Also have paper and writing instruments available for note taking and activities.
  
  Media equipment: TV with DVD player or computer with DVD drive, speakers and screen or wall.

Create a Comfortable Learning Atmosphere

- Choose a comfortable, well-lighted room with no distractions.
- Arrange straight tables in a U-shaped set-up or use round tables. Either way, it is important that each participant be able to make eye contact with other participants.
- Use name tents or name tags for participants.
- Encourage note taking for reinforcement purposes.
- Introduce yourself. Give the participants a brief sketch of your background, your experience and how you relate to the training subject. The more comfortable the participants are with you, the more effective you will be in facilitating their learning.
- Allow the participants to get comfortable with each other. Use self-introductions or icebreaking exercises to get the group relaxed.
  
  1. The participants can use your introduction as a model, which will help them overcome any natural reluctance to talk about themselves.
  
  2. Divide the class into groups of two. Give each pair of participants a few minutes to interview each other. Each one in turn introduces his or her partner to the group. This will speed the process of getting the participants to function as a group.
  
  3. Multiple sources for icebreaker exercises exist. Bring your own or visit your favorite bookstore or local library for ideas.
- Schedule breaks as needed.
Before You Begin: Tips for Trainers (Cont.)

Create a Comfortable Learning Atmosphere (Cont.)

■ Acquaint the participants with “housekeeping” items. Advise the participants regarding the important features of the training environment (e.g., location of restrooms and lounge facilities, breaks, etc.).

■ Establish clear goals. The specific learning objectives for this class are included in the Leader’s Guide (page 3). Keep in mind that the clearer the participants’ understanding of their objectives, the more likely it is that they will achieve those objectives.

Involving the Participants

■ Choose the segments of the program that best meet your needs. Decide the viewing method that works best (start/stop, all inclusive, minus the review segment, etc.).

■ Verify participant understanding by asking questions. They should do most of the work. Resist the urge to take over. Facilitate, but don’t dominate. Ask questions, coax answers, encourage give and take.

■ Encourage involvement of the participants by beginning questions with phrases such as:
  “What did you think about that?”
  “Tell me what you just saw.”
  “How do you relate to that vignette?”
  “That was interesting; what was your take on it?”
  “What were your initial impressions?”
  “How did that segment make you feel?”

■ Reduce participants’ apprehension by positively reinforcing their comments with statements such as:
  “That’s interesting; tell me more about what you mean.”
  “I hadn’t considered that angle yet.”
  “Good point.”
  “Okay, thanks for sharing that with us.”
  “That’ll be one of the things we need to consider.”
  “I really like your insight.”
  “That’s sure a unique perspective. Who else has some ideas?”

■ Reward participants for their enthusiastic participation. Prizes are always coveted.

NOTE: Telephone Doctor encourages you to create your own Skill Practices for each question to simulate issues specific to your organization.
Buy-in Activity

Let’s get started with a buy-in activity. As a group, using a flip chart or smart board, facilitate a 10-15 minute brainstorming session and create a list of ‘Pet Peeves’ your staff has with email communications.

Email Pet Peeves

Expect to hear responses such as:
Spam, timely responses, no signature details, personal notes, missing or HUGE attached files, common courtesy issues, formatting, misinterpreted humor, unanswered, viral messages, TMI – overloaded with details, spelling errors, harsh verbiage, capital letters, jargon and abbreviations, too technical, BCC, CC, forwarded notes with long trails, group reply all’s…

When participants have shared and discussed their ‘Peeves’, it’s now time to launch the Telephone Doctor chaptered DVD customer service training program *Email Matters* and improve communication skills.

Then follow through this Leaders Guide’s Discussion Questions, Skill Practices and Key Points. Continue the above process and view each chapter. ENJOY!
Chapter 1 – Introduction

In this opening module, we learned you should always comply with your organization’s policies. This series provides many tips spread across a series of sub-topics. If you encounter anything that seems to be in conflict with an organizational policy, you should always yield to that policy.

Discussion Questions:

1. Business email is used to better communicate with your customers and internal employees. Why is email such an effective method for your organization?
   
   - Fast (almost instantaneous)
   - Free (eliminates postage and envelope)
   - Record keeping (virtual paper trail)
   - Marketing (spreads info)

2. Email became a business communication touch point in the mid 1990’s – previously how did we communicate with clients.

   - Face to face, telephone, fax, and letters.

3. Some issues involving emails may revolve around legal matters or operational procedures unique to your organization. True or False? Discuss the whys’.

Skill Practice: Allow 10-15 minutes

Divide your class into several small teams with 2-4 participants.

- Assign an appropriate ‘Buy-In Activity – Email Pet Peeve’ to each team (page 7).
- Instruct these teams to discuss their peeve topic – give examples and explain the whys.
  
  Example:
  
  Harsh verbiage – “I cancelled my cable service because their technical support person replied to my email with abrupt words and it seemed they didn’t care about my needs.”
  
  Email from tech support: “We’re experiencing technical problems, expected repair time 24-48 hours.”

- To recap, ask teams to select someone to read their responses to the class.

KEY POINTS:

- Email communication is a fundamental component of everyday business life. It's fast, free and highly effective.

- The objective of this series is to provide tips, recommendations and reminders to help employees improve their communication skills with co-workers and deliver a higher level of service to customers.

- Always comply with your organization’s policies. If there is a conflict between a policy and something you see in this series, yield to the organization’s policy.
Chapter 2 – Synchronous vs. Asynchronous

Asynchronous communication has several advantages when emailing. Emailing reduces the chance for work to be interrupted, lends itself better to multi-tasking and the parties can answer when it’s convenient.

Discussion Questions:

1. When immediate attention is needed, which methods can you select?
   - Synchronous - choose face-to-face, on-line chat, video conferencing, or pick up the phone

2. The main problem with email is that it has a tendency to interrupt what the recipient is doing and forces them to respond to you immediately, even if it is not convenient for them to do so. Discuss why this statement is false.

3. Which approach, synchronous or asynchronous should be taken when responding to an upset customer who left a voice message late last night? Explain the why’s.
   - Synchronous - please pick up the phone. Your upset customer will hear your apologetic tone and appreciate that you called to take ownership and resolve the issue.

Skill Practice: Allow 10-15 Minutes

In this practice exercise, lead a discussion on ways your company will choose to respond to angry voice mails or emails. What is your plan?

Examples: Call as soon as you’re aware of the issue. Offer an apology and empathy. Help is here attitude! When leaving a voice message, send an email as well.

Consider posting your plan in a common area of your office for future reference.

KEY POINTS:

- Synchronous communication methods are those that take place in real time. Such as; face-to-face communication, on-line chat, video conferencing, and telephone conversations.

- Asynchronous communication methods are those that are not at the same time. There is a time-lag between responses. Such as; email, texting, voice mail, and snail mail.

- Advantages of asynchronous communication methods include reducing the chance of work being interrupted and making it easier to multi-task.

- Email can be efficient but sometimes is not the best solution for dealing with customer problems. When communicating via email, it can be very challenging to use important human relationship tools like a sincere helpful tone or warmth and empathy.
Chapter 3 – Subject Line Discussion
How to use the subject line to the best advantage when composing an email message.

Discussion Questions

1. What are some of the negatives to having an ineffective subject line?
   - Emails won’t be read, may be deleted, may confuse recipients, get lost in the shuffle...

2. When updates are made or subjects are changed in an ongoing email, what is an effective way to draw attention to this new information?
   - BOLD the Subject Line.
   - Flag the revised email.
   - Select ‘Read Receipt’ option.

Skill Practice: Allow 10 Minutes

On a white board or large paper, discuss what effective subject line will draw the readers attention.

Subject Lines:

Expect to hear responses like:

email will get attention,
avoid SPAM blockers,
quick responses,
easily tracked or referenced

KEY POINTS:

- The subject line in an email message is a very simple component and easy to gloss over, but it is very important and is one of the first things you want to put in your message.
- Subject lines should be short and concise and give a clear idea of the content of the message.
- Using a question in the subject line of a sales-related message can help get it noticed.
- Be careful not to use words and phrases in your subject line that could trigger spam filters.
Chapter 4 – Address Fields

Learn the differences between the three address fields and the proper way to use each of them.

Discussion Questions

1. What is the criteria to select a recipient name(s) for the ‘To’ field?
   - Only include the recipients’ who need to respond or be alerted to the topic.

2. True or false? Courtesy Copy is used to keep all “CC” recipients ‘in the know’.
   - True – these folks are not expected to respond.

2. When a recipient replies to an email - all To, CC and BCC will get the communication back. Why isn’t this accurate?
   - Only “To and CC” recipients’ will receive this reply

Skill Practice: Allow 10-15 Minutes

Most of us have accidently sent an email to the wrong address. Let’s share a few examples of the outcomes of sending an email to the wrong recipient(s). Next, get the facts by asking these follow-up questions below:

A. How did it happen?
   (Auto generate tool filled in similar name, selected “Reply all”, typing error…)

B. What was the outcome?
   (Got reprimanded, legal issues, hurt feelings, sent confidential details and lost a customer…)

C. How can we prevent these errors? (Double-check before sending anything)

KEYPOINTS:
- Each of the address fields (“To:” “CC:” and “BCC:”) has a distinct function.
- The addresses you use in the “To:” field will be those of the individuals directly involved in the subject matter and from whom you may need a response.
- Those addressed in the “CC:” field are people who would derive value from being included in the discussion but whose input is not necessarily needed.
- The “BCC:” field may be used in a variety of ways:
  - When you want to keep others informed of developments without openly displaying their email addresses to all the other recipients.
  - When you want a member of management copied without influencing any co-workers who might react differently if they knew management was being copied.
  - When you need to protect yourself by covering all of your bases.
Chapter 5 – Opening and Closing Lines

Explain the reason why business friendly greetings and closing phrases can be so important and how to better compose them.

Discussion Questions

1. Why are personal greetings and friendly closing phrases important?
   
   A. Can put the reader at ease.  
   B. Starts and ends notes with a ‘Business Friendly’ tone.  
   C. Says you’re dealing with a human instead of a machine with generated responses.  
   D. Says that you are a business friendly person to work with.  

2. Explain your reaction to emails that start with very formal verbiage, such as:  
   To whom it may concern, Dear Mr. or Mrs., Attention Sir or Ma’am, Hello Customer…  
   
   A. This is a huge company, too big to be friendly or care about me.  
   B. It’s impersonal.  
   C. Stuffy, formal, fancy, ceremonial, official, strict…

Skill Practice: Allow 10-15 minutes.

In small groups or as a class, let’s improve our communication skills by brainstorming and creating lists of effective opening and closing phrases:

<table>
<thead>
<tr>
<th>Opening Phrases:</th>
<th>Closing Phrases:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Now, discuss responses and select the groups ‘Top Picks’ lines with an (X).

Have participants raise their right hands and take an oath to apply these on every email.

KEYPOINTS:

- Greeting phrases create a warmer platform from which to start your business email.
- Personal greeting and closing phrases can make your message seem more warm and friendly.
- A friendly welcoming phrase and a warm closing phrase will make a big difference in the way your recipient interprets your email message.
Chapter 6 – Composing a Message

Understand the basic components to writing an effective email message and how to put them all together in the most effective message possible.

Discussion Questions

1. Our course outlined several steps you should take when composing a business email message. Which of the following is NOT one of them?
   - Friendly opening greeting.
   - Warm opening buffer statement.
   - Address your objective.
   - **Discuss the history of your relationship as a wrap up.**

2. What does the term "Business Friendly" mean? How can it effect the tone of an email?

3. If your message is composed effectively, you can expect your recipient to spend a great deal of time reading it and formulating a detailed reply. Your message should contain all the necessary supporting documentation so there is only one document related to your objective. Explain why this is a false statement?

Skill Practice: Allow 10-15 minutes

Divide participants into small teams. Ask participants to compose an email to discuss this month’s sales. The objective is to invite their co-workers to a brief meeting on Tuesday morning and offer suggestions to increase sales. Include an excel attachment.

Ask teams to share the versions they created. Compare and critique versions to highlight the most effective segments.

KEYPOINTS:

- Strive for the right tone in your business email messages. Make sure they are neither too formal nor too familiar, but they are "Business Friendly."
- Know the objective you wish to achieve by sending this email.
- Follow our simple, four-part process for composing a successful business email message:
  - Start with a friendly opening greeting.
  - Include a warm buffer statement.
  - Address your objective(s).
  - Close with a warm wrap-up statement and your signature line.
- Expect recipients to have only a minute or two for your message so make it concise and include necessary documentation as an attachment.
- Always proof and reread your email prior to sending.
- When you are the recipient of an especially successful email message, pay attention to it and learn from the techniques used in it.
Chapter 7 – Proofreading

Learn the importance of proofreading all email messages before sending and get some guidance of common errors.

Discussion Questions

1. Customers, co-workers or supervisors may judge you or draw conclusions about your intelligence if they receive written communications from you that are below the minimum standards they expect. Why is the answer true?

2. Misspellings and common typos are so typical, it's okay to have a few in your emails. It will humanize you and make you seem more "real" to your recipient. Why is this false?

Skill Practice: Allow 10-15 minutes

On flip chart paper or smart board, make a list of common errors that are easily caught in emails by proofreading.

<table>
<thead>
<tr>
<th>EMAIL ERRORS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responses you may hear:</td>
</tr>
<tr>
<td>Spelling grammar punctuations missing attachments, incorrect addresses incorrect dates formal verbiage subject line doesn’t match content missing signature line way too much information or details</td>
</tr>
</tbody>
</table>

Now, “1” being most common, rank this “1 - #…” Next, how can we prevent these?

Suggestions: by slowing down, third time’s the charm, speed is not success, keep a list of common errors nearby…

KEYPOINTS:

- Make it a practice to always carefully proofread every email message before sending.
- Double-check each field in your email message before hitting the send button.
- Start at the top of your message and read it slowly, all the way through. Does it make sense to you? Are there any sections that could be misunderstood? Can it be edited down and made more concise?
Chapter 8 – Message Length

Learn why “less is more” when it comes to the length of an email message and tips on getting your messages read.

Discussion Questions

1. We heard a reference to the old adage, "Less is more." In general, this means that which is less complicated is better understood and more appreciated than that which is more complex. In the context of this course, to what does this old cliché refer?
   • Because of crowded inboxes, increased workloads and limited attention spans, it's highly recommended that you send brief emails whenever possible.

2. The presenter in the program pointed out that often people will begin to read an email, discover that it is too lengthy to complete at that moment, and then put it aside with the intention of finishing it later. Often these emails will go unread for days and may never get read. Do you agree or disagree?

3. True or false? When you must send a longer message, starting out with an overview of what is to come, is the "kiss of death" as far as getting the message read. Telling people up-front how long a message will be is sure to get it relegated to the recycle bin. Why is this false?

Skill Practice: Allow 10-15 minutes

Ask participants to take notes to help retain answers shared in this activity.

We all agree that long rambling emails are an annoyance. When composing emails, we need to keep in mind that many people view their messages on their iPhone, iPad, and on an I-WATCH. Let’s explain why some people still write excessive details, facts and provide in depth information in email communications?

KEYPOINTS

• An email message that is too long is an invitation for a busy person to either ignore it or scan it and then put it off for future reading, if at all.
• If your goal is to get your message through, then less really is more.
Chapter 9 – Writing with Conviction

Become aware of why some words are better than others when you have a message to communicate and identify words that should be avoided.

Discussion Questions

1. Starting sentences with “Let’s” is another effective technique that conveys conviction. Explain why and create a few examples.

2. Which one of the following statements is a good example of “Writing with Conviction”? (C)
   A. I guess we can switch your delivery date to Tuesday.
   B. We might be able to install that by the end of next week.
   C. Jackson, this proposal makes sense for your organization.
   D. I’m just writing to tell you about our big sales event.
   Statements (A, B & D) Use “Weak Wimpy Words” as explained in this segment.

3. True or false? To send emails that convey conviction, you will need to completely rewrite your emails to remove the “Weak Wimpy Words.” This statement is false because?

Skill Practice: Allow 10-15 minutes

It’s a fact, customers will lose confidence in company representatives that use ineffective verbiage. In this activity, offer large sheets of paper and divide class into two teams.

Instruct ‘Team A’ to create ineffective phrases while ‘Team B’ creates confident effective alternatives; then share and compare responses.

TEAM A ~ Ineffective Weak Wimpy Words:
maybe, if I can, let’s try, I’m not sure, might, I guess, yes but, I believe, ummm, actually, unfortunately, just me, I don’t know, I’m new here…

TEAM B ~ Effective Confident Alternatives:
Let’s do this, certainly, let me help you, absolutely, you contacted the right place, let’s work together, let me research this for you, allow me time to resolve, here’s what we can do, one option to consider…

Key Points:

• To convey conviction, eliminate the use of “Weak Wimpy Words” from your email messages.
• A technique that conveys conviction is to start a sentence with the word “Let’s.”
Chapter 10 – Jargon and Shortcuts

Learn ways to avoid being too casual in business email writing and avoid the dangers associated with using company jargon and shortcuts in your email messages.

Discussion Questions

1. There may be a number of terms and abbreviations used within your organization that are meaningless to anyone outside the organization or your industry. Do you think it’s a good or bad idea to make your customers more familiar with these terms to get answers and orders processed?

2. Jargon is a specialized language used by particular groups. Why do we need jargon?

3. True or false ~ there are certain shortcuts that serve a purpose in texting or emailing friends and family, but they should be avoided in emails, chats or any other interactions with customers and co-workers. Why is this a true statement?

4. Some writing shortcuts, primarily used in instant messaging applications, have become so ubiquitous that they can now be found in the latest edition of Webster’s Dictionary. If the shortcut is listed there, it’s perfectly okay for you to use it in your business emails. Explain why this is a false statement.

Skill Practice – Allow 15-20 Minutes

Have participants work independently on the two items below.

Step 1. Make a list of commonly used jargon, terms and abbreviation used at your company.

<table>
<thead>
<tr>
<th>Company Jargon, Text Shortcuts, Lingo, Terms and Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOL YW LMFO B4 IDK TTYL OMG ROFL BRB BTW</td>
</tr>
</tbody>
</table>

Step 2. Explain what happens when someone is unfamiliar with these terms?

Step 3. How can we prevent the use of these terms in emails?

Key Points:

- Using company or industry “jargon” should be avoided in your business emails.
- In your business emails, do not use writing shortcuts common to texting. Doing so can cast a negative light on you and your company’s professionalism.
Chapter 11 – Respond Promptly

Delaying a response can make the sender wonder if their message was received. Gain knowledge on the importance of a prompt reply to business email messages even when an immediate reply is not possible.

Discussion Questions

1. True or false ~ promptness is a relative matter and most people don’t expect email messages to get an immediate response. You should handle your email messages in the order received and don’t worry that much about the time it takes to respond to each one. Better to have all the details ready for a thorough response than to shoot off a quick reply that will simply clutter up someone’s inbox and provide no useful information. Why is this false?

2. “Excellent customer service involves aligning the customers’ expectations with the likely outcomes.” What is meant by this, according to this course?
   - It means communicating and letting customers know what to expect.

3. Engaging an auto-reply message is one tool our course encouraged as a way of managing customers’ expectations. What key points should be in the reply?

Skill Practice – Allow 10-15 Minutes

Let’s brainstorm various prompt responses we could send to advise the sender that we received their email:

Prompt Email Responses:

- Thank you for your email, let me research your issue and reconnect in an hour.
- Please allow my team 1-2 hours to track your shipment. Stay tuned…
- My managers and I will review your questions and call you today at 10am.
- Thanks for sending this request. I’ll respond to your email on the next business day. For assistance now - please call 800-291-5905.

Key Points:
- Customers tend to expect a fairly prompt response to their email messages. When unable to do so, manage your customer’s expectations by sending a brief reply to acknowledge receipt of their message and an estimated time to expect your full response.
- When you need to be out of the office, engage an auto-reply message which includes the pertinent details:
  - The fact that you are away from the office.
  - The date/time you expect to return.
  - The name and contact details for someone who can assist in your absence.
Chapter 12 – Confidentiality

Address some of the confidentiality pitfalls of email communication and learn the types of information that would be better not to share in email messages.

Discussion Questions

1. One of the great benefits of using email for business, besides its efficiency and convenience, is its level of security. You can confidently send out any kind of sensitive information you wish via email and be assured it will remain confidential. Why is this false?

2. Email is a powerful communication tool, and it’s important to understand the limits when it comes to confidential and sensitive topics. Explain why sensitive topics should be limited.

3. What were a few of the tips shared in regards to the use of email for confidential information?
   - Don’t send unprotected, confidential information by email.
   - When supervising or managing, avoid using email to discipline someone.
   - Avoid using email to terminate an employee or a vendor.

Skill Practice: Allow 10-15 Minutes

Write the activity below on a white board or flip chart page.

Ask participants to define and discuss this statement from the vignette.

“Criticize in private. Praise in public.”

What does this statement mean?

Discuss what could happen when an email is circulated which criticize a customer?

KEYPOINTS:

- Email is a powerful communication tool and it’s important to understand the limits when it comes to confidential and sensitive topics.
- Don’t send anything through email that you wouldn’t be comfortable seeing on the front page of a news site.
- Tips regarding confidentiality in email messages:
  - Don’t send unprotected, confidential information via email – period.
  - When supervising or managing, avoid using email to discipline someone.
  - Avoid using email to terminate an employee or a vendor.
  - Avoid sending bad news via email. In most cases, having a human voice to deliver unfavorable news is preferable.
Chapter 13 – Handling Irate Customers

Learn how to properly handle and defuse upset and irate customers and how to separate yourself from the thing the customer is upset about, discover some techniques for defusing and satisfying the customer and when it’s best to abandon email and talk to the customer directly.

Discussion Questions

1. Have you ever taken a call and been greeted by a blast of angry words? How did you respond? What happened?

2. What are the steps to be followed in using the ASAP Technique to help an irate customer?

3. Have you ever had to deal with a customer who used profane or abusive language in voicing a complaint? How did you respond?

4. When you’re dealing with a customer who is upset about an error your company has made, do you try to “explain away” the mistake? Why do you think people tend to do that?

Skill Practice: Allow 10-15 Minutes

Let’s create an ‘ASAP Technique’ Shield of Defense. Invite the class to help brainstorm a list of issues that cause customers to become angry.

Responses you may hear: Late shipment, backorders, out of stock, no follow-up or returned phone call, pricing error, warranty issue, misunderstanding, etc.

Copy the worksheet (page 21) and examples below. Next, assign participants an issue and write an ASAP response. To recap, ask a few volunteers to share their ASAP Techniques.

**APologize  SYmpathize  ACcept RESPONSIBILITY  PREpare to HELP**

End this technique by always asking an engaging question

- What is the number on your invoice?; What number can I call you back at 2pm today?;
- When can we schedule a conference call to discuss this issue?

**KEYPOINTS:**

- When a customer is irate, it’s nothing personal. The customer is upset at a problem, not at you.
- Use the Telephone Doctor® ASAP Technique to handle irate customers:
  - A – Apologize sincerely and acknowledge the customer’s feelings.
  - S – Sympathize (and empathize) with the customer.
  - A – Accept responsibility for the situation and don’t pass blame.
  - P – Prepare to help.
- You can satisfy most of the people most of the time.
Let’s create an ASAP Technique Shield of Defense!

Issue:

Apologize/Acknowledge

“I apologize for the delay in your shipment. No wonder you’re upset.”

Sympathize/Empathize

“I don’t blame you. It’s slowing down your production.”

Accept Responsibility

“I’m happy to research a solution; my team will find options for you; let me get our technician to email directions; Again, my name is ______, here’s what we can do…”

Prepare to Help: (ask an engaging question to resolve.)

“Tell me when you need these supplies? When is the best time to call you? Where should we send your replacement parts, How about we cover the shipping costs on this order? Will you be available at 3pm for a conference call? What’s your direct phone number?…”

When you receive a complaint:
Step 1. LISTEN to the facts.
Step 2. Be prepared and personalize your technique.
Step 3. Deliver this technique as one sentence, end with a question to redirect the frustration to resolve the issue.
Chapter 14 – Replying to All

Explore the pitfalls of unnecessary “reply to all” responses.

Discussion Questions

1. Discuss how participants relate to this vignette. Has this happened at your office?

2. When someone replies “To All” unnecessarily or accidentally, it is sometimes referred to as “Reply Apocalypse” or “Email Storm.” So when is it okay to “Reply All”?
   - Only when the author requested you to: “Reply All”

3. One major benefit of using email for business communication is the time-saving potential it offers. But unnecessarily replying to all can cause a huge waste of time multiplied over the number of people getting the email. Explain why this is a true statement.

Skill Practice: Allow 10-15 Minutes

Write the activity below on a white board or flip chart page.

Ask participants to brainstorm when not to ‘Reply All.”

FYI News – Do Not “Reply All”

Examples may include:
Weather, Birthdays, Customer Comments, Sales and Product info, Illness, Who’s on Vacation, Cartoons, Political,…

KEYPOINTS:

- "Reply to All" means exactly what it says. Every name in the "To" and "CC" fields are going to get your message.
- Unnecessarily "Replying to All" can cause a huge waste of time.
- If you are replying to a group message and only some of the people need to see your answer, as a courtesy, simply remove the group members not affected.
Chapter 15 – Humor in Email

What are the benefits of safe, gentle humor in building business relationships? Let’s identify the types of humor that are okay to use in business email messages and explain why it is important to avoid those that are inappropriate.

Discussion Questions

1. When you are communicating face-to-face or by video conference, it's much easier to judge the meaning of the words because you gain information from visual communication cues such as facial expression and body language. These cues aren't available in email and this makes the communication of humor a tricky matter. Discuss why this is true.

2. When it comes to humor in email, one type you should never use is sarcasm. Explain why this is a safe practice.

3. What should you keep in mind when incorporating humor into your email messages?
   - Avoid controversial humor.
   - Review for possible misunderstanding.
   - Use gentle humor.

Skill Practice: Allow 10-15 Minutes

On white board or large paper, as a group - let’s discuss what topics should always be ‘off limits’ in work emails and why.

<table>
<thead>
<tr>
<th>“Off Limit Email Topics”</th>
<th>“The Whys”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flirting  Job Searches  Politics</td>
<td>May damage relationships</td>
</tr>
<tr>
<td>Religious Beliefs  Office Rumors</td>
<td>Different views may cause conflicts</td>
</tr>
<tr>
<td>Complaining about boss or others</td>
<td>Put your job in jeopardy</td>
</tr>
<tr>
<td>Salaries  Sex “Current Hot Topics”</td>
<td>Emails may be forwarded on and on…</td>
</tr>
<tr>
<td></td>
<td>Unprofessional image of yourself</td>
</tr>
</tbody>
</table>

KEYPOINTS:

- Avoid sarcasm in messages. It's too risky and won't translate the way you meant it.
- Use gentle humor when appropriate. While it won't produce crying laughter, it can warm a relationship and build rapport with your customer or co-worker.
- Always avoid political humor, religious topics or sensitive matters. There's little upside and major downside if you offend a client or a co-worker.
- Take time to review your emails before sending to check for content or wording that could be easily misinterpreted.
Chapter 16 – Tools for Emphasis

Explores methods to deliver a particular “tone” through the written word. Learn the tools available for creating a particular tone or emphasis in their email messages and to help them learn when (and when not) to use them.

Discussion Questions

1. This module explained that email lacks the tone, inflection and emphasis qualities we have with voice communication. There are, however, certain tools you can use in your email messages to help your recipient read your message in the tone you intended. List the tools recommended in this module.
   - Bold
   - Italics
   - Underline

2. While tools for written emphasis can help you bring tone to written messages, it’s important to use them sparingly and with great care. Discuss the cons of authoring a ‘flowery’ email.
   - Content may not be taken seriously
   - Challenge your professionalism or motive
   - Confusion over your intentions

Skill Practice: Allow 10-15 Minutes

In small groups, let’s practice and make changes to reduce the errors we’ve learned from this program. Copy and distribute the worksheet on page 25. Ask a few volunteers to share their changes.

KEYPOINTS:

- Use a single font or type style and a consistent size throughout your message.
- Use tools like bold, italics, color or underline to emphasize specific words or sentences that are crucial to understanding, but use these tools sparingly.
- When using these writing tools, keep two things in mind:
  - Not every email platform or software will display messages in the exact same way. It’s possible for the recipient to receive your email with a different appearance than what left your screen.
  - Remember that a growing number of recipients will be viewing your message on a hand-held device and thus a smaller screen. This can affect the viewing of your emphasis tools.
- Avoid the use of all caps. This is widely considered to be the equivalent of screaming or yelling and is highly unprofessional in a business environment.
- Use standard rules of writing to keep from distracting your recipient from the main message.
- Be sure and know your organization’s policy on the use of emoticons or emoji before including them in business correspondence.
EMAIL ERRORS WORKSHEET

In small groups, let’s practice and make changes to reduce the errors we’ve viewed in this program. Ask a few volunteers to share their changes.

To: Kathleen@acme.mail.com; Cafestaff@acme.mail.com; husband@homemail.com;
CC: mommaStout@mail.com; CEO@acme.mail.com; HR@acme.mail.com; hairdresser@mail.com
BCC: co-workers@acme.mail.com; friends@mail.com; dogsitter@mail.com; BIGAL@acme.mail.com;
SuZ-Q@acme.mail.com; stephen@acme.mail.com
Subject: HELP - Complaint against lunch menu options. Who decides on our ‘gluten free’ options?
Several team members have flour allergies – who can make this happen??? ASAP – Urgent!

Dear Katy-did, 😞 I would like to lodge a FORMAL complaint regarding the lack of variety in our cafeteria’s MENU. On the 27th day of March 2015, I’s jowned by several co-workers (Brenda, BIG AL, Sue Z Q, STEFFF-HAN – for a quick lunch in company cafeteria @ appro 11:31am – 2:15pm. Our GLUTEN FREE options only included: Chicken AND Rice soup AND SALAD bar (ewwww). WHO can broaden our options????????

TTYL, TA TA FER NOW! Love ewes, Lucy Stout aka self-appointed ‘Gluten FREE Queen’

ACME Sales and Service – Level III Manager, Quality Control lucy@acme.mail.com
131 Sunny Street Burbank Calif. 800-123-5467 Cell: 800-321.4567 Home: 800-555-5555

To:
CC:
BCC
Subject:

Eye have a spelling check her. It came with my pea sea. It plane lee marks four my revue Miss steaks aye can knot sea. Eye ran this poem threw it, your sure reel glad two no. Sayed its now red Dee 2 go.
Chapter 17 – Authoring Emails When Angry

Discuss the lasting effects of authoring or replying to emails when you are angry, and emphasize why angry comments are better left unsaid.

**Discussion Questions**

1. When you receive an angry email message or a co-worker has made you angry, it’s okay to send them an angry email in response. As long as it doesn’t turn into a prolonged back-and-forth battle, there will probably be no harm done. Discuss why this a false statement.

2. True or false? “Fortunately, if you make a mistake and send an angry email to a customer or co-worker, it will only be a temporary thing. Emails don’t last forever.” Lead a discussion why this is false.

3. Sometimes, situations in your personal life carryover and upset you at work. You may take out your frustration on an unsuspecting customer or co-worker. When you let the emotions of one situation leak over and affect another totally unrelated situation, it’s called “Emotional Leakage.” Discuss why a brief “waiting period” is recommended before replying to any aggressive or angry message from a client or co-worker.

**Skill Practice:** Allow 10-15 Minutes

Most everyone has “Emotional Leakage”. Some people are better than other at not sharing these issues. Ask participants to brainstorm on paper what triggers their emotions.

<table>
<thead>
<tr>
<th>Common “Emotional Leakage” Triggers:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Examples:</td>
</tr>
<tr>
<td>Unexpected bills or repairs</td>
</tr>
<tr>
<td>my children</td>
</tr>
<tr>
<td>traffic issues</td>
</tr>
<tr>
<td>bad weather</td>
</tr>
<tr>
<td>rude people</td>
</tr>
<tr>
<td>Dirty dishes in break room</td>
</tr>
<tr>
<td>spouse or partner</td>
</tr>
<tr>
<td>illness</td>
</tr>
<tr>
<td>pets</td>
</tr>
<tr>
<td>meetings</td>
</tr>
<tr>
<td>daily tasks</td>
</tr>
<tr>
<td>The stuff that life is made of</td>
</tr>
<tr>
<td>never have enough money to make ends meet</td>
</tr>
</tbody>
</table>

**KEYPOINTS:**

- Never respond with an angry reply in a business email message. It will come back to bite you.
- When necessary, wait a period of time before authoring your reply.
- Be the "bigger person" when handling these incidents. Putting an angry response in writing to a customer or co-worker is a recipe for trouble.
- Avoid "Emotional Leakage" - taking out the negative emotions from one situation on another uninvolved individual.
Chapter 18 – Internal Customer Service

Realize that everyone in an organization serves customers – either directly or indirectly – so every action you take should be undertaken at the same high level of service you would provide to external customers.

Discussion Questions

1. Do you agree or disagree? The modern office is generally completely free of drama and friction.

2. It's effective to apply two different styles of communication at work. It's easy to “switch gears” depending upon whether the customer is external or internal. Why is this a false statement? Why does this mentality cause internal challenges?

Skill Practice: Allow 10-15 Minutes

Let’s “HUDDLE UP” by separating participants into three teams. Provide paper and ask these team to write a list of simple changes to support the concept of “WACTEO” in our company.

Expect responses such as:
Support each other, be consistent, use these effective email techniques internally, display a positive attitude, don’t rush staff, avoid drama, don’t gossip, remember the Golden Rule, be obviously friendly, work as a team, make eye contact, acknowledge staff when coming, going and hall passing each day, return all department calls promptly, be polite, don’t let staff calls go to voice mail…

Share and compare each teams suggested changes.

KEYPOINTS:

• Remember the concept of WACTEO - We Are Customers To Each Other.
• It makes sense to use the same respectful communication tools with both internal and external customers.
• There should only be one level of service - your highest level. It’s simpler to operate that way.
• Use the same great communication tools with both internal and external customers:
  • Emails that use respectful phrases.
  • Emails that use the same warm greeting and closing phrases.
  • Author clear and concise email messages that are respectful of the reader's time.
Chapter 19 – Inappropriate Topics

Gain a better understanding of the extreme dangers of emailing sensitive topics, off-color messages and negative information.

Discussion Questions

1. What were the suggestions made in this module?
   - Keep all your emails free of derogatory comments about other team members, managers, clients and the company.
   - Never author or forward email with obscene remarks, racist content or pornographic images.
   - Never send or forward chain letters, viral hoaxes, political cartoons or any questionable material around your organization.

2. Most everyone has a private email address for personal emails. You should make sure all your friends know to direct all personal emails to your private account rather than to your work account. Discuss the reasons this is a true statement.

3. True or false. If you are ever unsure whether an email you receive is legitimate or might actually be dangerous, it’s best to open it just long enough to read the first line or two and see if you can tell who it’s from. If not, then you can delete it. What makes this a false statement?

Skill Practice: Allow 10-15 Minutes

As a class, come up with scenarios when a customer or co-worker has offended you or others by emailing inappropriate topics.

Examples: Obesity, smoking, drugs, sexual orientation, politics, religious beliefs…

Depending on the size of your class, break into small teams and assign a scenario to each group. Allow time to script how ‘they’ would respond to a customer or co-worker who has made an inappropriate comment by email. Then, present each scenario to the class. ENJOY!

KEYPOINTS:

- Keep all your emails free of derogatory comments about other team members, managers, clients or your organization.
- Never author or forward emails with obscene remarks, racist comments or pornographic images.
- Never send or forward chain letters, viral hoaxes, political cartoons or any questionable material around your organization.
- Inappropriate emails can result in a range of problems – from disciplinary to termination.
- Beware of dangerous emails. Using common sense can save you from serious trouble.
PROGRAM QUIZ

1. Synchronous communication, according to our course, means “taking place at the same time.” It’s communication happening in real time. Which of the following is an example of synchronous communication?
   A. Email.
   B. Video Conferencing.
   C. Text Messages.
   D. Voice Mail.

2. While email is excellent for delivering rapid responses, it lacks many of the human relationship tools that are available to you when on the phone or talking face-to-face.
   A. True.
   B. False.

3. The individuals addressed in the “CC:” field are those who would derive value from being included in the discussion, but their direct action, input or response are usually not required.
   A. True.
   B. False.

4. Greeting phrases create a warmer platform from which to start your business email. Which of the following is an example of a good greeting phrase?
   A. “Did you hear back from Brian?”
   B. “Hi Noah.”
   C. “Not sure who to send this email to... ”
   D. ”Yes, email the client.”

5. Our course outlined several steps you should take when composing a business email message. Which of the following is NOT one of them?
   A. Friendly opening greeting.
   B. Warm opening buffer statement.
   C. Discuss the history of your relationship as a wrap up.
   D. Address your objective.

6. The goal of a business email is to convey your thoughts as if the recipient was on the other side of the world, since he/she very well could be. Be sure that the message is less casual and more formal.
   A. True.
   B. False.
QUIZ (continued)

7. You heard a reference to the old adage, "Less is more." In general, this means that which is less complicated is better understood and more appreciated than that which is more complex. In the context of this course, to what does this old cliché refer?
   A. Because of crowded inboxes, increased workloads and limited attention spans, it's highly recommended that you send brief emails whenever possible.
   B. Less time on the telephone and in face-to-face conversations makes a more productive day possible. Email is much more efficient.
   C. The less time you spend working means the more time you'll have for more rewarding pursuits. You should always use the most efficient communication method available.
   D. The less you use personal pronouns in your messages, the more impactful they will be.

8. Three of the following statements use "Weak Wimpy Words" as explained in the video segment. Which one of the following statements is a good example of "Writing with Conviction?"
   A. Jackson, this proposal makes sense for your organization.
   B. I guess we can switch your delivery date to Tuesday.
   C. We might be able to install that by the end of next week.
   D. I'm just writing to tell you about our big sales event.

9. Which of the following is an example of a "Weak Wimpy Word" as explained in the video segment?
   A. "Just. . ."
   B. "I think. . ."
   C. "Maybe. . ."
   D. All of the above.

10. There may be a number of terms and abbreviations used within your organization that are meaningless to anyone outside the organization or your industry. It's an important job for you to make sure your customers get familiar with these terms in order to facilitate their ability to get their questions answered and their orders processed.
   A. True.
   B. False.
QUIZ (continued)

11. Promptness is a relative matter and most people don’t expect email messages to get an immediate response. You should handle your email messages in the order received and don’t worry that much about the time it takes to respond to each one. Better to have all the details ready for a thorough response than to shoot off a quick reply that will simply clutter up someone’s inbox and provide no useful information.
   A. True.
   B. False.

12. “Excellent customer service involves aligning the customers’ expectations with the likely outcomes.” What is meant by this, according to our course?
   A. It means using surveys and other methods of finding out what customers really want and finding a way of providing it to them.
   B. It means finding out what customers really want and then developing the proper marketing tools to make them think that whatever it is you offer is totally aligned with what they want.
   C. It means communicating and letting customers know what to expect.
   D. It refers to a multi-departmental initiative to ramp up production and promotion of products that align with the latest consumer trends.

13. Our course stressed the importance of having a system in place for handling customer inquiry emails when someone is out of the office or otherwise unable to respond immediately. Engaging and auto-reply message is one tool our course encouraged as a way of managing customers’ expectations. Which of the following were suggested for inclusion in this message?
   A. The information that you are away from your office.
   B. The time you are expected to return.
   C. The contact details for the person who can help them if they’re unable to wait.
   D. All the above.

14. A number of tips were presented in this module for handling irate customers successfully. Which of the following was NOT one of them?
   A. Keep in mind that it’s nothing personal. These are people that are unhappy at a problem and are simply venting their anger at you.
   B. Use the Telephone Doctor® ASAP Technique.
   C. It’s normal to feel emotionally upset when you need to deal with irate customers via email. Let your emotions guide you to the best solution.
   D. You can satisfy most of the people most of the time.
QUIZ (continued)

15. The “P” in the “ASAP Technique” stands for:
   A. Promise a solution within 24 hours.
   B. **Prepare to help.**
   C. Pour out your heart when helping others.
   D. “Potty Mouths” will get no help.

16. When a customer uses bad language in an angry email to you, this is the one and only time you are allowed to respond in just as angry a manner as the customer.
   A. True.
   B. **False.**

17. When someone replies to all unnecessarily or accidentally, it is sometimes referred to as:
   A. A "Digital Storm."
   B. An "Email Overload."
   C. **A "Reply Apocalypse."**
   D. A "Big No-No".

18. In the video you viewed, you heard about documented stories regarding large organizations being involved in epic wastes of work time because someone accidentally replied to a huge group. What happened after the initial "reply to all" that multiplied the waste of time?
   A. Some of the recipients then accidentally forwarded the email to another group they were a part of and now there were two groups of people wasting time.
   B. Many of the group members continued to "reply to all" asking to be removed from the group - all except for the one recipient for whom the reply was actually important. He was ignoring the "Reply Apocalypse" and ended up wasting more time by not communicating needed information on a timely basis.
   C. There was no such story in the video I watched.
   D. **Some of the recipients replied back again to all, asking to be unsubscribed from the group, which further caused others to ask to be removed.**

19. Keep in mind when incorporating humor into your email messages. Which of the following was NOT one of them?
   A. Use gentle humor.
   B. Avoid controversial humor.
   C. Review for possible misunderstanding.
   D. **Use sarcasm freely.**
QUIZ (continued)

20. Which of the following is the best choice to summarize the theme?
   A. Internal customers deserve respect, but aren’t nearly as important as external customers.
   B. The idea of internal customer service is really a misconception. Co-workers are not customers.
   C. Internal customers should receive the same level of excellent service you provide to external customers.
   D. Email messages to co-workers are in a completely different class from those that leave the walls of the company and you should know the differences.
Key Points: Email Matters - The Art of Better Service

Chapter 1 Introduction

- Email communication is a fundamental component of everyday business life. It’s fast, free and highly effective.
- The objective of this series is to provide tips, recommendations and reminders to help employees improve their communication skills with co-workers and deliver a higher level of service to customers.
- Always comply with your organization's policies. If there is a conflict between a policy and something you see in this series, yield to the organizational policy.

Chapter 2 Synchronous vs Asynchronous

- Synchronous communication methods are those that take place in real time.
  - Face-to-face communication
  - On-line chat
  - Video Conferencing
  - Telephone Conversations
- Asynchronous communication methods are those that are not at the same time. There is a time-lag between responses.
  - Email
  - Texting
  - Voice Mail
  - Snail Mail
- Advantages of asynchronous communication methods include reducing the chance of work being interrupted and making it easier to multi-task.
- Email can be efficient but sometimes is not the best solution for dealing with customer problems. When communicating via email, it can be very challenging to use important human relationship tools like a sincere helpful tone or warmth and empathy.

Chapter 3 The Subject Line

- The subject line in an email message is a very simple component and easy to gloss over, but it is very important and is one of the first things you want to put in your message.
- Subject lines should be short and concise and give a clear idea of the content of the message.
- Using a question in the subject line of a sales-related message can help get it noticed.
- Be careful not to use words and phrases in your subject line that could trigger spam filters.
Key Points: *Email Matters - The Art of Better Service* (continued)

Chapter 4 **Address Fields**

- Each of the address fields (“To:” “CC:” and “BCC:”) has a distinct function.
- The addresses you use in the “To:” field will be those of the individuals directly involved in the subject matter and from whom you may need a response.
- Those addressed in the “CC:” field are people who would derive value from being included in the discussion but whose input is not necessarily needed.
- The “BCC:” field may be used in a variety of ways:
  - When you want to keep others informed of developments without openly displaying their email addresses to all the other recipients.
  - When you want a member of management copied without influencing any coworkers who might react differently if they knew management was being copied.
  - When you need to protect yourself by covering all of your bases.

Chapter 5 **Opening & Closing Lines**

- Greeting phrases create a warmer platform from which to start your business email.
- Personal greeting and closing phrases can make your message seem more warm and friendly.
- A friendly welcoming phrase and a warm closing phrase will make a big difference in the way your recipient interprets your email message.

Chapter 6 **Composing a Message**

- Strive for the right tone in your business email messages. Make sure they are neither too formal nor too familiar, but they are "Business Friendly."
- Know the objective you wish to achieve by sending this email.
- Follow our simple, four-part process for composing a successful business email message:
  - Start with a friendly opening greeting.
  - Include a warm buffer statement.
  - Address your objective(s).
  - Close with a warm wrap-up statement and your signature line.
- Expect recipients to have only a minute or two for your message so make it concise and include necessary documentation as an attachment.
- Always proof and reread your email prior to sending.
- When you are the recipient of an especially successful email message, pay attention to it and learn from the techniques used in it.

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Key Points: *Email Matters - The Art of Better Service* (continued)

**Chapter 7 Proofreading**

- Make it a practice to always carefully proofread every email message before you send it.
- Double-check each field in your email message before hitting the send button.
- Start at the top of your message and read it slowly, all the way through. Does it make sense to you? Are there any sections that could be misunderstood? Can it be edited down and made more concise?

**Chapter 8 Message Length**

- An email message that is too long is an invitation for a busy person to either ignore it or scan it and then put it off for future reading, if at all.
- If your goal is to get your message through, then less really is more.

**Chapter 9 Writing With Conviction**

- To convey conviction, eliminate the use of “Weak Wimpy Words” from your email messages.
- A technique that conveys conviction is to start a sentence with the word “Let’s.”

**Chapter 10 Jargon and Shortcuts**

- Using company or industry “jargon” should be avoided in your business emails.
- In your business emails, do not use writing shortcuts common to texting. Doing so can cast a negative light on you and your company’s professionalism.

**Chapter 11 Respond Promptly**

Customers tend to expect a fairly prompt response to their email messages. When unable to do so, manage your customer’s expectations by sending a brief reply to acknowledge receipt of their message and an estimated time to expect your full response.

- When you need to be out of the office, engage an auto-reply message which includes the pertinent details:
  - The fact that you are away from the office.
  - The date/time you expect to return.
  - The name and contact details for someone who can assist in your absence.
Key Points: Email Matters - The Art of Better Service (continued)

Chapter 12 Confidentiality

- Email is a powerful communication tool and it’s important to understand the limits when it comes to confidential and sensitive topics.
- Don’t send anything through email that you wouldn’t be comfortable seeing on the front page of a news site.
- Tips regarding confidentiality in email messages:
  - Don’t send unprotected, confidential information via email – period.
  - When supervising or managing, avoid using email to discipline someone.
  - Avoid using email to terminate an employee or a vendor.
  - Avoid sending bad news via email. In most cases, having a human voice to deliver unfavorable news is preferable.

Chapter 13 Handling Irate Customers

- When a customer is irate, it’s nothing personal. The customer is upset at a problem, not at you.
- Use the Telephone Doctor® ASAP Technique to handle irate customers:
  - A – Apologize sincerely and acknowledge the customer’s feelings.
  - S – Sympathize (and empathize) with the customer.
  - A – Accept responsibility for the situation and don’t pass blame.
  - P – Prepare to help.
- You can satisfy most of the people most of the time.

Chapter 14 Replying to All

- "Reply to All" means exactly what it says. Every name in the "To" and "CC" field is going to get your message.
- Unnecessarily "Replying to All" can cause a huge waste of time.
- If you are replying to a group message and only some of the people need to see your answer, as a courtesy, simply remove the group members not affected.

Chapter 15 Humor in Email

- Avoid sarcasm in written messages. It’s too risky and won’t translate the way you meant it.
- Use gentle humor when appropriate. While it won’t produce crying laughter, it can warm a relationship and build rapport with your customer or co-worker.
- Always avoid political humor, religious topics or sensitive matters. There’s little upside and major downside if you offend a client or a co-worker.
- Take time to review your emails before sending to check for content or wording that could be easily misinterpreted.
Key Points: *Email Matters - The Art of Better Service* (continued)

Chapter 16 *Tools for Emphasis*

- Use a single font or type style and a consistent size throughout your message.
- Use tools like bold, italics, color or underline to emphasize specific words or sentences that are crucial to understanding, but use these tools sparingly.
- When using these writing tools, keep two things in mind:
  - Not every email platform or software will display messages in the exact same way. It's possible for the recipient to receive your email with a different appearance than what left your screen.
  - Remember that a growing number of recipients will be viewing your message on a hand-held device and thus a smaller screen. This can affect the viewing of your emphasis tools.
- Avoid the use of all caps. This is widely considered to be the equivalent of screaming or yelling and is highly unprofessional in a business environment.
- Use standard rules of writing to keep from distracting your recipient from the main message.
- Be sure and know your organization's policy on the use of emoticons or emoji before including them in business correspondence.

Chapter 17 *Authoring Emails When Angry*

- Never respond with an angry reply in a business email message. It will come back to bite you.
- When necessary, wait a period of time before authoring your reply.
- Be the "bigger person" when handling these incidents. Putting an angry response in writing to a customer or co-worker is a recipe for trouble.
- Avoid "Emotional Leakage" - taking out the negative emotions from one situation on another uninvolved individual.

Chapter 18 *Internal Customer Service*

- Remember the concept of WACTEO - We Are Customers To Each Other.
- It makes sense to use the same respectful communication tools with both internal and external customers.
- There should only be one level of service - your highest level. It's simpler to operate that way.
- Use the same great communication tools with both internal and external customers:
  - Emails that use respectful phrases.
  - Emails that use the same warm greeting and closing phrases
  - Author clear and concise email messages that are respectful of the reader's time
Key Points: *Email Matters - The Art of Better Service* (continued)

Chapter 19 *Inappropriate Topics*

- Keep all your emails free of derogatory comments about other team members, managers, clients or your organization.
- Never author or forward emails with obscene remarks, racist comments or pornographic images.
- Never send or forward chain letters, viral hoaxes, political cartoons or any questionable material around your organization.
- Inappropriate emails can result in a range of problems – from disciplinary to termination.
- Beware of dangerous emails. Using common sense can save you from some serious trouble.
Before They Go

In order to reinforce the skills and techniques that have been addressed, choose one or more of these reinforcement options:

Suggested Methods of Review

- Discussion questions are provided in this Leader’s Guide for your use.

For Continued Success

- Change is more likely to occur if participants commit to implementing skills and techniques discussed during this course. Various resources are available illustrating commitment exercises.
- According to experts, it takes 21 days to develop a new skill or routine. To reinforce what insights they gained from this program, ask the participants to write them down. The participants can then refer back to the insights and share them with others.
- In order to evaluate training success and identify areas to improve, provide participants with the opportunity to evaluate the training by using an evaluation survey. (See sample below.) This is a prime opportunity to identify future training needs.

TRAINING EVALUATION

Thank you for attending a Telephone Doctor workshop today!

Please take a minute to let us know your feelings.

Rate the following: 1 - 5 (5 being the best)

- This course was useful & I enjoyed it
- Material related to my job
- Topics were clear & easy to understand
- I will use these skills
- Please rate the instructor
- Overall rating for this class

Comments are appreciated:

________________________________________________________________________________________________________________________________________________________

________________________________________________________________________________________________________________________________________________________

________________________________________________________________________________________________________________________________________________________

Your Name: __________________________________________ Date: ______________  
Instructor: __________________________________________
Closing Words

Knowing how to communicate effectively isn’t good enough. You need to put what you know to use. You need to make it work for you. If you do, you’ll get what we promised at the start of this course – more satisfaction from your job and a brighter future for your organization and for yourself.

- You’ve got the skills.
- You’ve got the knowledge.
- You’ve got the purpose.
- THE REST IS UP TO YOU!

Good Luck!

And Remember –

IT’S FUN TO BE GOOD!