

4 Phone Interaction Design

Care Begins When the Phone Rings!

Phone skills are some of the most important skills a Hospice can develop. The world is FULL of average to low-quality phone practices. This makes it relatively easy to stand out as an extraordinary organization with some thoughtful phone *Standards* and training!

“Thank you for calling the New AT&Teez! We want you to have a great customer experience! This call may be monitored for quality purposes. All customer service representatives are currently with other customers. Calls will be handled in the order they are received. Your call is extremely important. We are currently experiencing unusually high call volume. You can get quicker help on the web. [Hold music, cheesy with static with bragging “Want to quickly resolve your issues? Use our new customer service app or access the web!”]”

This is what a Caller gets when they call most organizations. Most ignorant companies try to push every Caller to web or use an automated system that doesn’t understand what you want. It is rare to get a real person immediately! To get to a “real” person is normally only accessed after a LONG wait, where the Caller stands a very real chance of being cutoff...and having to call back to get “in the cue” again! When you finally get through to a “real” person, the person normally is not empowered enough to solve the Callers issue. Thus, the Caller is given yet “another number” to call or is transferred, where the Caller has re re-tell his or her story again... AND this is considered NORMAL and ACCEPTABLE by most organizations!!!!

This is why Sunny Day does NOT copy or imitate average organizations. We seek the practices of the few companies that are extraordinary as well as practices we develop ourselves. The point is to be *Extraordinary!*

Why Focus on Telecommunicative Skills?

As we move into the future, an increasing amount of the care we provide is going to be done via telecommunicative means. Phone interactions, emails, voicemail messages and texts are examples of modes of telecommunications. Each of these needs to be considered. Some may not be viable or best. But each needs to be considered. It is important to step back and notice



how people in the modern world get their communications and use them if deemed to be beneficial.

Therefore, as part of Sunny Day's Model, we do not take phone interactions, or any interactions for that matter, for granted...nor do we assume that everyone knows how to create a satisfying customer experience via telecommunicative means. This short film will help to demonstrate some of the expected elements and qualities of Sunny Day's phone interactions. The effective use of a phone or other telecommunicative device is a skill. And as we advance into the future, our ability to convey our compassion, care and competence will be increasingly through telecommunicative means.

Expand your Ideas about the Phone!

You can win over a referral source with a "single" phone call or voice message you leave! You can make a person's day! IF a call or message is "jarringly warm" and impacts a person's FEELINGS sufficiently, a person will be "won over" to Sunny Day. This is what we are aiming for when we use telecommunications! If we are "copying" what most other organizations do, we will be AVERAGE. The bar of quality regarding telecommunications is LOW! We take phones skills to a higher level!

1st Impressions

For most organizations, the first contact with the company is over the telephone. A call comes in and an impression is made. Most of us know the importance of first impressions. They can be lasting. In fact, an organization can lose its opportunity to serve right there if the call is not handled well.

You only have one chance to make a *1st Impression!* This is true. In fact, if an organization blows the *1st Interaction* (which is normally a phone call), the organization will spend an enormous amount of Energy trying to recover...and the organization may not ever recover! It is best to do an AMAZING job in the first place! The purpose of our phone interactions, and certainly the *1st Interaction*, is to win people over to be fans of Sunny Day.

Focus on How You Make People FEEL

"People will forget what you said, people will forget what you did, but people will never forget how you made them feel."

Maya Angelou



The primary thing a phone interaction needs to do is make a person FEEL good! This has to do with the tone, pace, words used, the attentiveness of the listener... The Caller wants to FEEL that he or she is HEARD! It is an energetic exchange! The Caller also wants to know that the organization is addressing his or her issue.

Would Patients Prefer a Phone Call Over a Visit?

This question must be asked. It can be often answered by putting ourselves in the Patient Chair. Of course, it depends upon the situation. Also, we have a POC to comply with! So that has to be considered too! Miss ONE visit and it could cost a Hospice \$28,000! Missing just ONE visit! But the thing is, we often have flexibility when we visit.

Imagine...you, the Caregiver, have been up half the night. Mom had a rough night but the situation has been handled. The house is a disaster with dishes piled to the sky and stuff spread all over the place. You are in your favorite Batman pajamas and you are now very comfortable. At this point, do you want a visit? Most all humans want to put off a good image and not look dumb or incompetent. So with the knowledge that a Hospice Clinician is going to visit, what will most people do? They will start cleaning up the house. They will get out of their comfortable Batman pajamas. They will put a lot of effort into getting prepared. ALL OF THIS COULD BE ELIMINATED WITH A SIMPLE PHONE CALL! The Clinician needs to perceive and discern what would be preferred and best for that situation. What would make that patient and family FEEL the best?

The 6 Phone Skills that all Sunny Day Staff must Master

There are 6 phone skills that 100% of Sunny Day staff must Master via *System7* and are learned in this **sequence**. They are:

1. How to Answer the Phone.
2. How to Place a Caller on Hold.
3. How to Transfer a Call.
4. How to Dig!
5. How to Communicate what Sunny Day is about!
6. How to Handle a Service Failure.

These skills can be taught in a variety of ways! However, here is the best way we know now!



- (1) Issue the Self-Learning Sunny Day MP3 file to your staff. It can be downloaded from the website or accessed from the People Development area. Issue the Phone Skills Study Guide.
- (2) In a group setting, have your Students with their Sunny Day Phone Pads in front of them.
- (3) The teacher then uses the Call-Out teaching method, putting the Student on the spot with a “Ring Ring Ring” and the Student answers the call.
- (4) We try to “make the pill small” starting with repeated practice before their peers with “How to Answer the Phone.” Once you have went around the room a time or so and your Students have that mastered, then progress to “Placing a Caller on Hold.” When you have went around the room and your Students have demonstrated they know how to do that, then add “Transferring a Call.” Do the same thing as you did with the other skills. Then add the final skill of “Dig!” or “Digging!” This can and should be a FUN teaching and learning experience! The scenarios you can come up with can range from easy to difficult to hilarious!
- (5) Progress to the remaining skills of “How to Handle a Service Failure” and “How to Communicate what Sunny Day is about!”

Each of the skills builds upon the prior. These sequence provides ample practice until the skill of Digging! is mastered!

This training method is not only for initial phone training, but should be done periodically and, at minium, anuually.

The Sunny Day Phone Skills MP3

A Sunny Day MP3 with our way of handling phone is available to all staff. This audio file is POWERFUL and will imprint exact words, phrases and tone into the memory bank! In fact, exact words are imprinted and use of such words and phrases become natural and easy via familiarity.

Listening to audio files helps Sunny Day staff redeem “windshield time.” They can be used between visits and during commutes to and from work. When the audio message is heard, if a visual image has been established, that image will be replayed in the mind of the listener. For example: If you see a movie and susequently you hear the audio of the movie, many of the images will appear in your mind! Therefore, audio files can be applied to nearly anything that needs to be taught and learned! It can range from Visit Structures to clinical skills...and of course Phone Skills!



Use Your Professional Judgment!

With Phone Interactions as well as the Sunny Day Visit Structure, know that all calls and visits require professional judgment. **70%** of Phone Interactions and the Visit Structure is based on professional judgment. Only 30% is prescriptive! The structures provide guidance and help support Sunny Day staff when the person is tired and Energy levels are low which happens to all people. Example: There are times when “Matching” would not be appropriate or might even embarrass the Caller. A Master Teacher is *sensitive* to the Caller and can helpfully guide a person without being “mechanical” or “robotic.” Like in the Visit Structure, paraphrasing is required and a talent we highly desire at Sunny Day.



IRM Phone Pads

Phone pads or phone call sheets provide IRMs to help people that answer phones to your phone Standards! An IRM helps people remember and do Standards in low-Energy states. Below is an example of a Phone Pad!

1) Sunny Day, this is _____! or Sunny Day, _____ speaking! [SMILE]
2) Salutation (Mrs. . Miss Mr. ↓ _____ First Name
3) Zen Listening
4) Validate & Match "NAME, just to make sure I understood/heard you corre

All of the BASICS are covered in this simple form!



How Sunny Day Handles the Phones!

	IRM	Our Language	What?	Why?
	God Help Me		<p>Ask for help and guidance in your phone interactions. Ask for Energy and insight in order to be as helpful as possible. Set aside your own positions and judgments of others.</p> <p>Sunny Day is an organization that favors Spiritual values and not a particular belief system. We believe that we are more than a physical body and that Life continues.</p>	<p>This is the same way all Sunny Day visits start. In a state of Humility, we open ourselves up to Energy and insight that is beyond our own capabilities. This is a high Spiritual understanding that transcends logic and thought. A person's Energy INCREASES when we let go of our ego and control. Surrender to "All that is..."</p>
1	NO Automated System! Real People!		<p>Sunny Day does not use an automated system. Rather we use real people.</p>	<p>Sunny Day does not use impersonal automated phone systems. This attention to service immediately separates Sunny Day from other organizations. People highly desire a personal experience. Voice mail is available as a last resort. But even that voice mail must be "Life-Changing!" A live "kind" voice on the line is a great comfort to a person calling Sunny Day. Automated phone systems are not Sunny Day's way as they frustrate Callers with menu options and questioning prompts causing people to hang up and even become hesitant to call. The sad fact is that people expect automated phone systems today. Therefore, a live caring person on the phone sets us apart and results in a more satisfying patient and family experience. In addition, this helps to create long-term and loyal referral sources that implicitly trust our high-quality and predictable processes.</p>



	IRM	Our Language	What?	Why?
2	Answer the Phone within 3 Rings		We answer the phone within 3 rings. Time is important to our patients, families and referral sources.	We do not want people waiting for a response for long periods of time. When the phone rings over 4 times, it causes anxiety for Callers. This is why we have a system with multiple people. We have a first ring, second ring, and third ring person. If a call is not picked up immediately, the next person takes the call.
3	Your Voice...	<p>“Sunny Day, this is Jill!”</p> <p><i>Alternative</i></p> <p>“Sunny Day, Jill speaking!”</p>	<p>This is how we answer the phone - every time!</p> <p>Add NOTHING to this such as “Thank you for calling” or “How can I help you?” These are wastes of time and do little to help Callers. Cell phone responses may be slightly different.</p> <p>At Sunny Day, we are respectful of time. We do not place any judgment as to the reason(s) behind a call as it may be a referral, a compliment, the need for something, a complaint or a thank you. This simple answer does not pre-suppose the reason for the Call.</p>	<p>“Sunny Day, this is Jill!” This short greeting communicates 3 important things. (1) The Caller has contacted the right organization, (2) The Caller is speaking with Jill, a real person and (3) Jill is HAPPY, full of energy and is ready to serve! She is happy to be working for a great organization! Your voice is your advertisement. Within seconds, the Caller creates a mental picture of you, judges your educational level, your FEELINGS towards Sunny Day, origins, energetic state and other things.</p>



	IRM	Our Language	What?	Why?
4	ZEN Listening! Listen and Perceive!		<p>Write down the <u>First</u> and <u>Last</u> name of the Caller on a Sunny Day pad!!!</p> <p>Listen and Perceive, "seeing beyond" the spoken need. Concentrate on the Caller without "reloading" or trying to think about how you are going to respond. Just LISTEN directing your focus on the person and FEEL their situation.</p>	<p>Listen and Perceive! Listen not only to the words being spoken, but to the tone and the "unspoken need" if there is one. An example would be to ask someone about something and the response is affirmative but lackluster. The Caller is usually sending a clue about how they really feel. With these clues, we can gracefully delve deeper and discover the real situation. Listen and seek to understand before speaking. Over the phone, you must develop relationship building skills. When you seek to understand the other person first, without mentally "reloading" or thinking about what you are going to say in return, you will gain their confidence. The Caller should "FEEL" they have been heard. Once you have insight into the Caller's concern, you can intelligently deal with the situation.</p>



	IRM	Our Language	What?	Why?
5	<p>Validate & Match</p> <p>Match refers to using the exact words of the Caller to help the person FEEL heard.</p>	<p>"Mrs. Smith, just to make sure I understood/heard you correctly..."</p> <p>Or</p> <p>"Mrs. Smith, just to make sure I got it right..."</p> <p>"Should we address you as Miss or Mrs.? We try to be respectful!"</p> <p>"What is best call-back number?"</p> <p>Or</p> <p>"Is the number you are calling from a good number to reach you at?"</p>	<p>Use the Caller's name to show recognition. Give comfort by showing you really "heard" them by using the EXACT words of the Caller when appropriate. Then LISTEN for the strength of the Caller response. A "strong affirmation" indicates you "got the order correct." A "weak affirmation" indicates there is something that is "off." In this case, Dig deeper!</p> <p>If in doubt about the salutation of the Caller such as Miss, Mrs. or other respectful identification, politely ask. Sir and Ma'am? With etiquette on the phones, there is a high degree of professional judgement. Most of our clients are older people and statistically FEEL good when such terms of respect are used, but we must be sensitive in a modern and changing world.</p>	<p>Everyone wants to be heard. This is a basic human desire. At Sunny Day, we do not "reinterpret" what the Caller said as this either demeans the person or makes the Sunny Day representative seem "less than bright." By using the EXACT words, the Caller knows that he or she was heard! Of course, professional judgment has to be used in all interactions. The Sunny Day representative then LISTENS for the "affirmation" after the question. Then, via professional judgment, the Sunny Day representative has a good grasp if they understood the Caller and "got the order correct" or if perhaps didn't or if there are other issues which are veiled behind the response. Listen Beyond the Spoken Need!</p>
6	Dig!	<p>"Why is someone ill?" "Mrs. Smith, what is your biggest concern?" "I think we can help!" We can get someone out immediately to help you sort through your options."</p>	<p>If you perceive there is more than is spoken in your professional judgment, in good taste, gracefully ask questions to try to determine the real reason the person is calling.</p>	<p>Nobody calls Hospice for a good time. If a call is received, usually someone is in need. If someone asks where to get a piece of DME equipment or a health care product, there is probably a patient or family we can serve related to that call. In these situations, we "dig!" "Why is someone sick? I think we can help?" This must be done gracefully and with tact. You have to perceive the comfort level of the Caller and sometimes you need to help the Caller express difficult things.</p>



	IRM	Our Language	What?	Why?
7	A Brief Description of the Sunny Day Experience	"You did the right thing by calling us! "Sunny Day has a unique way" of creating a care experience unlike any other Hospice. We are conscious of the small details as well as large aspects of the care experience just like this phone experience. The reason for this meticulous attention to detail is simply because we care and love enough to do such..."	Assure the Caller that they made the right call! You made a great choice! Differentiation: Explain "why" we are different from any other Hospice! This comes from the "heart" as well as our attention to detail and process. Paraphrasing is important when describing Sunny Day! Be real and speak your heart about our company!	Give the Caller comfort. Let the Caller know that they are choosing a "stunningly" high-quality and highly organized Hospice that has considered every aspect of the care experience! Anything that is promised can be done for every person, every time. Bottom-line we LOVE people enough to be this considerate. At Sunny Day, we aspire to the highest ideals of unconditional Love.
7a	You Have a Voice Regarding Your Care	"We build the experience around you! We provide a menu of options so you can choose what's best for you!...and you can modify it any time you wish!"	We let patients and families choose what they want. We put you in the control seat of the experience. This is NOT how most Hospices operate as they "cookie cutter" Hospice care.	We build the "experience" around you! We sit down with you and explain your care options because we want what is "just right" for you!



	IRM	Our Language	What?	Why?
7b	We are Guests & Are Aware of Sacred Time	"We view ourselves as "guests" in your home and do not want to take away precious time with your loved ones. We stay as long as necessary to assist and help, being considerate not to intrude on your sacred time."	<p>We demonstrate excellent manners and respect the home that we have been invited to serve.</p> <p>We do not want to stay longer than necessary. We want to visit an ideal amount of time.</p>	<p>The "guest mindset" reminds us that we are temporary people in the lives of those we have the privilege to serve and that we are to be utterly considerate. We are Teachers guiding people through an experience that we are most familiar with and the setting of this experience is in a very personal space that has been conditioned by those that live there. We respect this!</p> <p>A Sunny Day Visit is not too short or too long. It is just right. We recognize that there is a principle of diminishing returns when visits last beyond the time needed to calmly and confidently teach. We are sensitive to time. As a Hospice, we understand the importance of time and view it as sacred and possibly the most valuable thing a person possesses. Therefore, we do not "take" time from patients and families by overstaying our welcome.</p>
7c	Not Today	"If a visit would not be convenient or would somehow not be beneficial, you can just say to our staff "Not Today" or hang one of our "Not Today" signs on your entry door. We are sensitive to your time with your loved one as it can never be redeemed."	<p>We provide Sunny Day "Not Today" door hangers so a family can communicate that a visit is not wanted on that day.</p> <p>The opposite side of the "Not Today" door hanger says "Quite Please" – these are used far more! And they have Sunny Day's phone number on them for EASY access!</p>	<p>The "Not Today" door hanger helps families avoid interruptions with little effort or pain. Perhaps the family is watching a special TV show that came on or a special visitor dropped by.... In these cases, a Sunny Day visit WOULD CAUSE PAIN! Even having the caregiver explain that a visit would not be ideal is a PAINFUL experience for the caregiver! Therefore, Sunny Day has thought ahead and made it EASY!</p>



	IRM	Our Language	What?	Why?
7e	Best Time to Visit	"What is the best time to visit? We can be there as soon as you'd like and it won't take long! Do you have special TV shows or things you do at specific times in the day? We don't want to interfere with these activities. Our work is about you!"	<p>We recognize any special daily or weekly events where a visit or phone call would interfere and avoid those times. We don't want to intrude.</p> <p>For possible Admissions, we gently press for a "same day" visit as Sunny Day Admission visits are short! In fact, we have a response for every reason to delay an Admission visit. There is NO NEED for patients to suffer unnecessarily.</p>	As time is viewed as sacred at Sunny Day, we take the time in the beginning of the relationship to find out the best time to visit. We visit according to the wishes of patients and families. We are not a 8am to 5pm Hospice and make routine visits using the same staff members that routinely visit in most cases regardless of the time of day. If a visit or call would be more ideal at 7pm when a caregiver gets off work or after a certain TV program, that is what we do.
7d	Manage Expectations Regarding the Frequency of Visits.	"We will visit on a regular basis as well as when you need us for situations that arise. At first, we may only visit once or twice a week and more frequently if needed. However, as the disease progresses, know that we recognize this and will be there!"	We visit when needed or when a visit is desired by our patients and families. Thought is given to each visit. We visit differently based on the diagnosis and circumstances of the patient and family.	We visit on a regular basis to monitor the situation. Many times a call is sufficient to monitor the situation. We manage the expectations regarding our services as we recognize that <i>anything that is less than the expectation results in disappointment.</i>
8	Gratitude	" Mrs. Smith , thank you for letting us serve you!"	Express your gratitude! This is a high Spiritual state!	A spirit of gratitude and thankfulness is a wonderful "FEELING" for everyone involved. It provides Energy for the patient and family as well as for you! At Sunny Day, we aspire to live and serve in a "spirit of gratitude" every day! It is a spiritual value of our organization.



	IRM	Our Language	What?	Why?
9	Log Your Call!		Document the call in the Internal System.	Sunny Day has created an internal call system for tracking calls. This call system was created from a follow-through perspective and we are continually refining it. Every call is logged. Anyone can check up on anyone for outstanding issues. It can tell if someone is not returning calls or if we are experiencing less or more of certain types of calls. It is just another way that we can make sure our promises are being kept and that people are not being disappointed.



How to Place a Caller on Hold

	IRM	Our Language	What?	Why?
10	A Moment...	" Mrs. Smith , may I place you on hold for just a moment?" (Pause/ Listen) "Thank you."	We <i>gracefully</i> put Callers on Hold.	If call volume is heavy and a Caller must be put on hold, manage the person's expectation saying "May I place you on hold for just a moment?" At this point, an expectation has been created. A Caller must not be on Hold for more than a minute or two. If the Hold is going to be longer, then ask if you can call them back.
11	Experience our Hold Messages!		Our Hold messages are actual testimonies of caregivers that want to tell how we touched their lives.	At this point, the Caller gets to experience testimonials of actual caregivers and patients. We do not "sell" or "brag" with our Hold music and messages.
12	Off Hold with Grace!	"Thank you for being so patient Mrs. Smith! How may I help you?" <i>or</i> "I appreciate your patience Mrs. Smith! How may I help you?"	Gracefully, thank the Caller for their patience and address their "voice."	Upon taking the Caller off Hold say "Thank you for being so patience. How can we help you?" Again, the tone is happy and upbeat!



How to Transfer a Call! A WOW Experience!

	IRM	Our Language	What?	Why?
13	<p>NEVER let a Caller have to repeat their Name or Retell their Story!</p> <p>Match Again!</p> <p>Match refers to using the exact words of the Caller to help the person FEEL heard.</p>	<p>"Hello Mrs. Smith. I'm JoAnn. Jill has explained your situation to me. Let me paraphrase to make sure that we understood you correctly."</p> <p>OR</p> <p>"Did I understand you correctly?"</p>	<p>Gracefully transfer the call to the person that is able to help. We need flawless "hand-offs." Use the Caller's name to show recognition. Give comfort by showing you really "heard" them by using the EXACT words and pace of the Caller. Then LISTEN for the strength of the Caller response. A "strong affirmation" indicates you "got the order correct." A "weak affirmation" indicates there is something that is "off." In this case, Dig deeper!</p> <p>By referencing "Jill" - the transferor of the call, adds an additional WOW and good FEELING as the Caller knows they are working with an integrated team!</p>	<p>People almost fall over when a transfer is done like this!!! It is a surprising feature of customer service when the person a Caller is transferred to already knows the situation! This is IMPRESSIVE as the Caller does not have to re-tell the story or re-ask the question. The "hand-off" is critical. Many great initial phone experiences are wiped out by a "fumbled" phone transfers.</p> <p>Everyone wants to be heard. This is a basic human desire. At Sunny Day, we do not "reinterpret" what the Caller said as this either demeans the person or makes the Sunny Day representative seem "less than bright." By using the EXACT words, the Caller knows that he or she was heard! The Sunny Day representative then LISTENS for the "affirmation" after the question. Then, via professional judgment, the Sunny Day representative has a good grasp if they understood the Caller and "got the order correct" or if perhaps didn't or if there are other issues which are veiled behind the response.</p>



How to Handle a Service Failure

	IRM	Our Language	What?	Why?
1	Validate & Match!	“Just to make sure I understand Mrs. Smith , (use the EXACT words Mr. Smith used to voice her “gift” (complaint).	Repeat back to the person, using the EXACT language and pace. However, use professional judgment in this as someone may have spoken in a state of extreme anger and would be embarrassed or insulted in some cases if you use the EXACT words!	We want the Caller to FEEL and know that he or she has been HEARD! That the Sunny Day person is genuinely interested in their concern or whatever they have voiced.
2	“I’m SO Sorry, We’re SO Sorry!”	“I’m SO Sorry, We’re SO Sorry!”	We OWN the “gift” (complaint). We do not blame the Caller or blame one of our vendors or associates. At Sunny Day, we are grown-up and hold ourselves Accountable. We are responsible for the professional management of the care experience.	“I’m SO Sorry!!!” and “We’re SO Sorry!” – A “heartfelt” apology goes a long way. We at Sunny Day FEEL the PAIN of regret. Regret in this case is useful and is appropriate to LEARN! If it does not hurt, then the Sunny Day person has some growing to do in the Humility department.
3	“Thank you for sharing this Gift!”	“ Mrs. Smith , thank you so much for sharing this gift with us! It takes courage to do this! And we SO value this feedback!”	We want the Caller to FEEL good. The Caller in the case of a complaint is in a negative state of mind normally. We are shifting the negative into a positive, a positive not only for their immediate situation, but for all others that Sunny Day has the privilege to serve in the future!!!	It takes courage to share a complaint or point out a problem for most people. They are making us AWARE or conscious of something that we might be blind to... Statistics indicate that only a fraction of dissatisfied customers complain. Only 1 person in 20 will complain. So when a “gift” is received, it is an indication that there are as many as 20 more similar unvoiced complaints.



4	You have Made the World a Better Place!	“Mrs. Smith, we are going to take your “gift” and improve our processes so that this never happens to anyone else. By sharing this, we are now aware of the shortcoming. You have made the world a better place! We thank you for that!”	At Sunny Day, we are people of process. We are devoted to People Development. We will go to the ROOT of the problem, with Humility, and fix it to the best of our abilities.	Sunny Day believes that people are fundamentally good and that people want to do a good job. However, most companies do not provide people with the tools and structures to help them be EXTRAORDINARY! By addressing the process problem at its root, rather than on a symptom level, we can ensure that the place of dissatisfaction will be eliminated or reduced to an outrageously low frequency.
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Characteristics and Important Points about Phone Interactions

Characteristics and Important Points about Phone Interactions		
A	Have a Heart of Service!	Everyone at Sunny Day has a heart of service. We screen for this quality with our people selection process. A person serving via the phone must be predisposed to the idea of providing a great customer experience. The person must have a heart for it, and therefore have a heart for people. We don't believe that listening to a message or attending a course on phone skills will make someone great at it. It starts with having people within the organization that care...that care “enough” to make sure people ARE taken care of and that their expectations are met or exceeded. At Sunny Day, we do not think that a heart for service is teachable in most cases. We do not want to be a company where calls aren't returned promptly, where people are passive with little personality, are disinterested or are monotone. People need to "feel" that we care.
B	Be Courteous and Polite.	Show courtesy and be polite. This should go without saying. It should be normal behavior to treat everyone with warmth and grace. Many people on the phone are not particularly polite and courteous. This is not the case at Sunny Day! Being courteous and polite is part of the Sunny Day Way!



C	Be Confident on the Phone. Never BS!	We must be confident on the phone. Callers "feel" confidence. You cannot give what you do not have. If you are not confident in yourself or the services Sunny Day provides, you must not be on the phone as your lack of confidence will be "felt" by everyone you speak to or work with. It's not just your words that matter, but the mannerisms and tone of your interactions. The solution is to gain confidence in yourself and the Sunny Day Way. Immerse yourself in our Visit and Team Design to understand how we meticulously consider the care experience from the patient/family perspective, all within a framework that enables us to be strong and sustainable. Gain the confidence you need so that you can be convincing and assuring to those in need. Never BS! If you are asked about a subject that is not in your area of expertise, never pretend or give the impression otherwise. If you don't know the answer to a question or problem simply acknowledge it and tell the Caller that you'll make sure either you will get the answer or that you will have someone that is more competent in that area respond. The point is, know what you're talking about. Never BS people and don't exaggerate. Be credible as we are a credible organization.
D	Be Real!	Be real with people. Relax and loosen up. Be yourself on the phone. Yes, we have a basic structure regarding phone interactions. However, you don't have to play the part of someone else. You're a unique person with a unique personality. You are a one-of-a-kind! When you're on the phone, just be yourself. For many people on the phone, there's a "business stiffness" that is repulsive and cold. Your tone should be warm and caring. That's what people want on the other end. Think about the best customer service phone interaction you've experienced. It was probably from one of these naturally warm and competent people. That's what we're after with our phone interactions.
E	Don't Talk Too Long.	Don't talk too long on a phone interaction. You don't have to spend massive amounts of time or share the intricate details of your life in order to build a strong relationship over the phone. Most people are busy, so be conscious of that fact. Get to the point with grace. People that talk too much usually are doing it for their own needs and are not really concerned for the person on the other end. You can't listen and learn when your mouth is moving.
F	Prioritize!	Learn to prioritize. One of the characteristics of successful people is the ability to rank and perform tasks in their order of importance. If you have 5 clients that need help, determine which ones are most critical. Get help from other people if needed and make sure that you communicate with clients if you can't satisfy their needs immediately. Be realistic. Under promise and over deliver if you are unsure about your ability to meet a deadline. It is imperative that Caller expectations are managed. Be honest and let the Caller know the situation. They might not always like the time delay, but it's better than damaging Sunny Day's credibility.



G	Never Drop a Call!	Never drop a call. That is, never forget about a call or a commitment. This type of service failure destroys confidence in Sunny Day. We often do not get a second chance. Most of us know how disappointed we are when people don't return calls or fail to do what we expect. If you're delayed for some reason, make the Caller aware of the delay, managing the expectation. We are people that follow-through and this distinction separates Sunny Day from other organizations and Hospices.
H	When You Blow It!	All people blow it on the phone occasionally! It's part of the human experience. When you drop a call or select a poor choice of words, talk too much or fail in some way, acknowledge it to the Caller. Come clean as soon as possible. People are more forgiving than we give them credit. By acknowledging the mistake or transgression early, you will regain credibility.

Teaching Phone Skills

There are many things that need to be considered in the phone experience.

1. Tone
2. Words Used
3. Pace
4. A Sensitivity of how the Caller is FEELING
5. Seeing past the unspoken need
6. Try to get a same day visit with ALL inquires



A Few Days before the Class

Do Phone Training **before** training staff in the Visit Structure. Phone Skills are less intimidating and only take a few hours. This gives Students a win and builds confidence! *System7* is used. Provide students with:

- a. A Pre-Test/Study Guide
- b. **Self-Learning Module**/Audio (CD/MP3)

Day 1

1. Grabber: Let's call Sunny Day. Put Sunny Day on speaker and ask a tricky question. This is a demonstration that the skills are real at Sunny Day!
2. **Tell:** Explain why phone skills are important on an organizational as well as on a personal level. Reference the section in the manual devoted to this area.
3. Explain our phone skills points. Teacher solicits feedback and answers questions.
4. **Show:** Have the students listen to high-skilled staff on the phone.
5. **Test:** Test and grade on Phone Skills. Reward the first 2 students that score 100%.
6. **Practice:** Work through the group starting with "How to Answer the Phone" until 100% of the Students can do it. Then add, "Listen & Perceive" and "Validate – Match." Have each Student answer the phone and get to this added step. Then, add the next and so forth. This repetition "makes the pill" small and easier to learn as it is incremental. Make it fun!
7. Have the students separate into groups and have them call each other. Have them critically evaluate each other. This builds teaching skills and the ability to hold each other Accountable.
8. Run the students through scenario #1. Run the students through scenario #2. Run the students through scenario #3.
9. **Evaluate Practice:** Evaluate and grade (pass/fail).
10. **Certify:** Certify and then Annual Re-Certify. Record in certification tracking system with date.

Scenarios

- #1 – Basic call.
- #2 – Basic call plus anxiety
- #3 – Placing a Caller on Hold
- #4 – Transferring a Call.
- #5 – Performing a Monitoring Call with a normal caregiver
- #6 – Performing a Monitoring Call with a talkative caregiver
- #7 - Reporting a Death
- #8 - Customer Service Failure
- #9 - Wrong Department or Area



What to do with a Talkative Caregiver?

This has been described as a “high jacked” visit. You want to be polite and you definitely want to hear needs and concerns. However, a very talkative person can take a great deal of time and actually keep you from being able to do your visit or see other patients. Here are a few things you can do.

1. Establish an expectation when the patient initially makes the election that visits usually last XX minutes! Not hours.
2. Steer the conversation back to the patient.
3. Change the physical space of the conversation.
4. Never “chat” even if you have time. This creates an expectation for future conversations that will end in disappointment.
5. Provide polite cues to “move on” – body language is a good one.

The 3 Things You Do When Service Failures Happen

What is a service failure? The MVI definition is this,

A service failure (gift) is any serious expression of dissatisfaction from an external source.

What are the 3 things you do at Sunny Day if a service failure happens?

1. “I’m Sorry!!!” – A “heartfelt” I’m sorry! We are sorry! The person must FEEL our regret.
2. “Thank you for sharing this Gift!” – It takes courage to share a complaint or point out a problem for most people. They are making us AWARE or conscious of something that we might be blind to... “I” am so Sorry! – As an individual. “We” are so Sorry as a company
3. “We are going to take this Gift and improve our processes so that this NEVER happens to another person! You have made the world better by sharing this with us! Thank you so much!” – We are people of process. We are devoted to People Development. We will go to the ROOT of the problem, with humility, and fix it to the best of our abilities.



The Mystery Caller Program

Every week, there will be random quality measurement calls. The goal of this program is to help us improve our phone skills and make sure that all patients or potential patients are offered care through “digging.”

Situation: _____

Name you'll be using:		
Diagnosis/Situation:		
Patient Name:		
How you heard:		
Where you live:		
Barriers you will use:	Delay	Worries Need to Think about it

Call Greeting	
Number of rings?	
On Hold? (secs)	
Greeting you heard	
Gave their name?	
Voice clear?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Easily understood?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Caring/Happy tone?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Call Transfer	
Number of rings?	
On Hold? (secs)	
Greeting you heard	
Gave their name?	
Voice clear?	Yes <input type="checkbox"/> No <input type="checkbox"/>



Easily understood?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Caring/Happy tone?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Call Rating	
Did not seem rushed or distracted	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/> Difficult <input type="checkbox"/>
Cared about you, focused on needs and feelings	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/> Difficult <input type="checkbox"/>
Communicated at your level of understanding	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/> Difficult <input type="checkbox"/>
Effectively handled your barriers and roadblocks	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/> Difficult <input type="checkbox"/>
Offered follow-up call/said what follow-up would be	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/>
Urged you to call back at any time	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/>
Gave you a sense of help and reassurance	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/>
Tried to get your name	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/>
Asked how you heard about us	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/>
Asked about your situation/why calling today	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/>
Offered to contact the doctor on your behalf	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/>
Offered to schedule a visit to discuss needs	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/>
Urged and directed you to schedule a visit	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/>
You would call again if you needed help	Yes <input type="checkbox"/> No <input type="checkbox"/> ? <input type="checkbox"/>

