

# Customer Service: Phone Etiquette & Reception work

Presented by  
Frontier Supply Chain Solutions, Inc.

# CUSTOMER SERVICE

Topics of Discussion

# TOPICS

## TOPIC'S OF DISCUSSION:

- USING EMAIL AND BASIC PHONE SKILLS
- HOW TO USE THE SOFTPHONE & THE OFFICE PHONE - BASIC FEATURES
- PHONE GREETINGS
- HOW TO TRANSFER A CALL
- HOW TO PUT SOMEONE ON HOLD
- RECEPTION (ANSWERING THE GENERAL PHONE LINE)
- SECURITY AND SCREENING CALLS

# CUSTOMER SERVICE

## Topics of Discussion

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## TOPIC'S OF DISCUSSION CONTINUED:

- TYPES OF PHONE CALLS AND WHAT DEPARTMENT TO TRANSFER TO:
  - PARS CALLS
  - PAPS CALLS
  - SALES/QUOTE CALLS
  - LINEHAUL/LOGISTICS CALLS
  - ACCOUNTING/BILLING ISSUE
  - HR/HIRING/PAYROLL CALLS
  - DISPATCH CALLS (WPG, TOR, SK)
  - APPLE EXPRESS CALLS
  - TRACKING CALLS
- PHONE SCRIPTS FOR WEEKEND AND EVENING STAFF



If we say that our customers are our #1 priority but they can never get a hold of us, then what message are we really sending?

## **AVOIDING THE PHONE**

With the advent of e-mail, most of us have taken to avoiding the phone at all costs. The thing is that **a 5 minute phone call can often do the work of 5 e-mails with hefty attachments.** "Think of how long that would take you,"

## **USING THE PHONE OVER EMAIL**

This is a problem because when we are on the phone, how we speak and what we do has a big impact on the company.

It can take 4 to 5 good connections to make someone forget one bad connection.

# CUSTOMER SERVICE

Using Email &  
Basic Phone Skills

# SOFTPHONE & OFFICE PHONE

How to use Both the Softphone & Office Phone

## PHONE SETTINGS

Make sure your phone has been set up with our IT department. Most of Frontier's office phones will look like the image to the right.



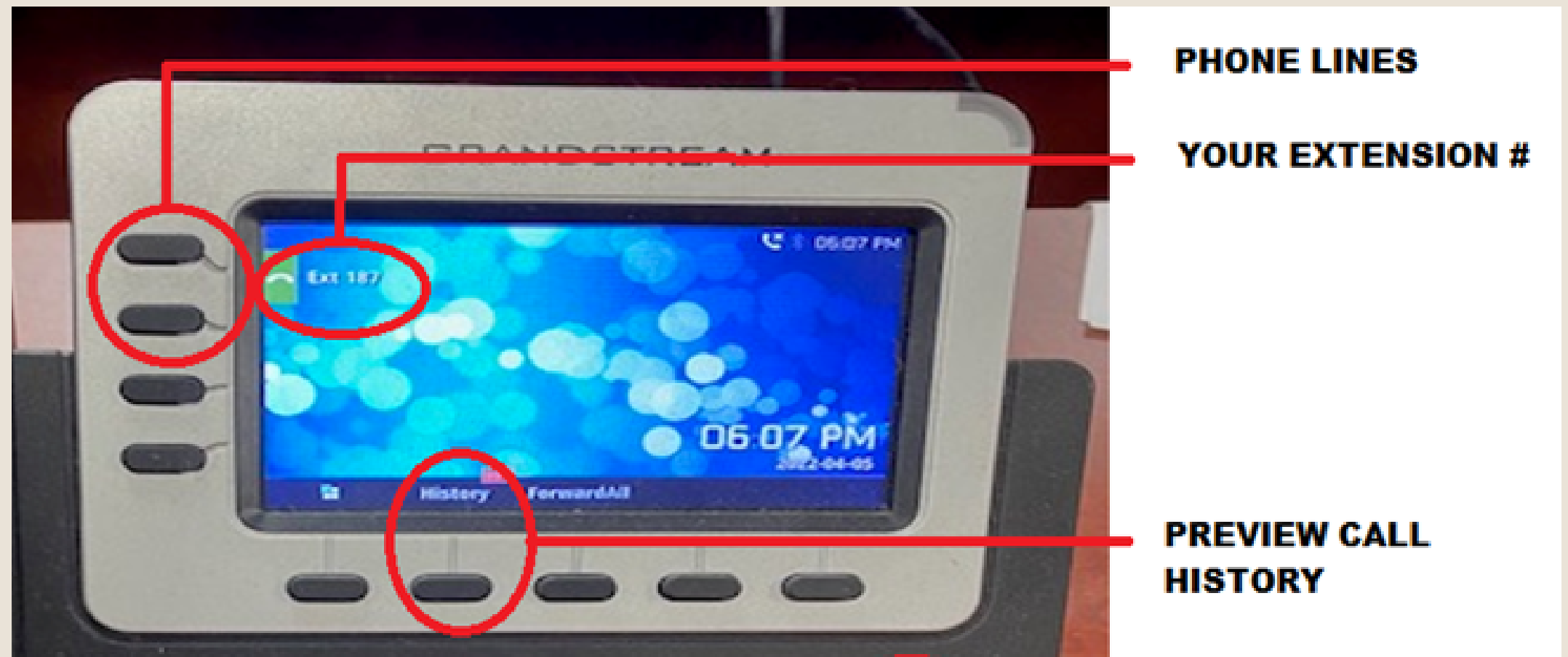
## COMMON FUNCTIONS USED WHEN USING THE OFFICE PHONE



- PHONE LINES
- YOUR EXTENSION #
- PREVIEW CALL HISTORY
- VOICEMAIL
- TRANSFER CALL
- HOLD
- MUTE
- ANSWER CALL ON SPEAKER

# SOFTPHONE & OFFICE PHONE

## Office Phone Basic Feature Functions



### PHONE LINES

We have two available phone lines that can be used simultaneously

### YOUR EXTENSION NUMBER

Displays the local extension

### PREVIEW CALL HISTORY

If you click on the button, it allows you see all calls 'Answered', 'Dialed', 'Missed' and etc.

# SOFTPHONE & OFFICE PHONE

## Office Phone Basic Feature Functions



### **VOICEMAIL:**

To access your personal voicemail

### **TRANSFER CALL:**

To transfer current call

### **HOLD:**

To put the caller on hold

### **MUTE:**

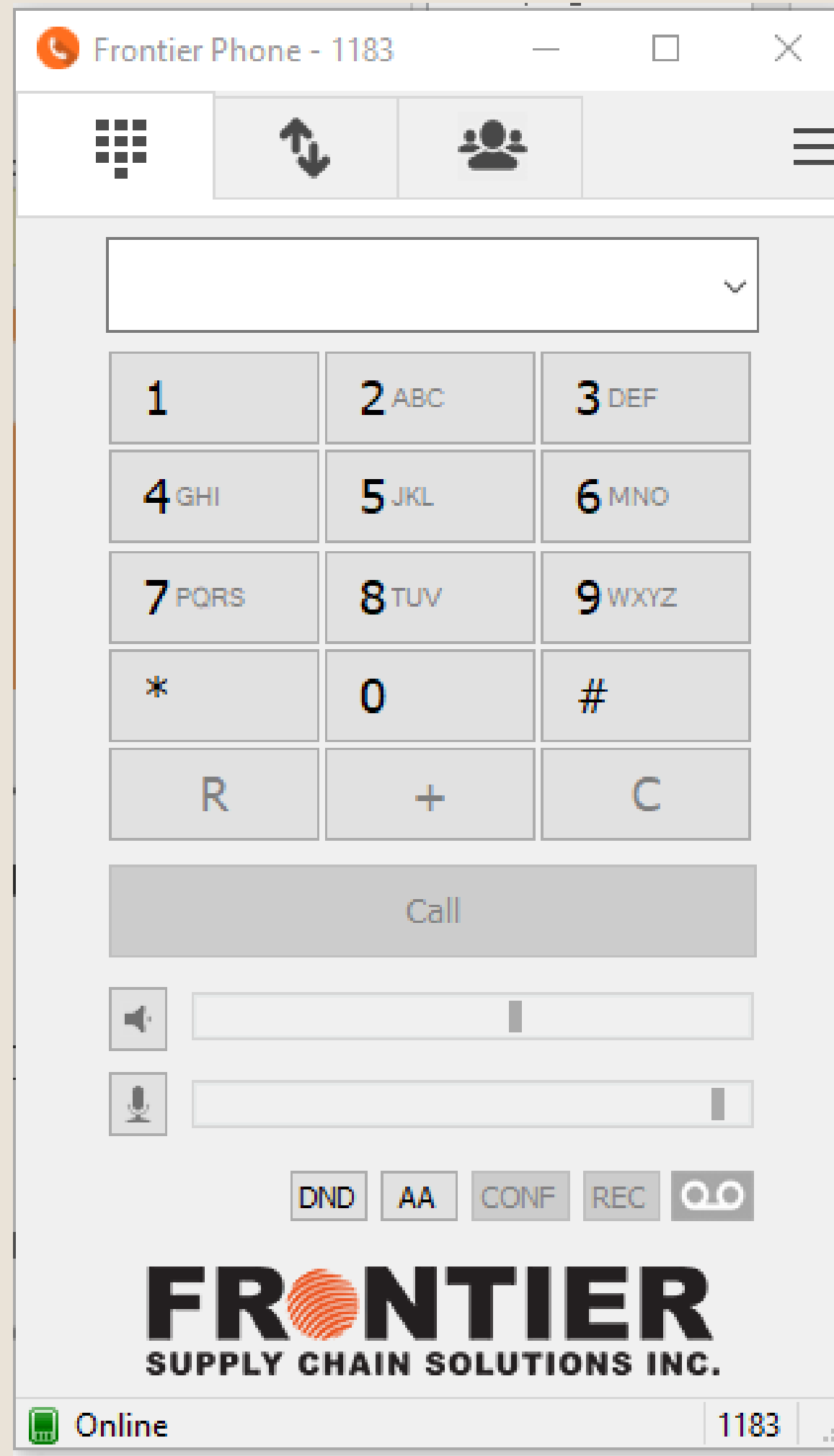
To mute your mic but still allow you to listen to the caller

### **ANSWER CALL ON SPEAKER:**

To remove the caller off speaker, just pick up the phone

# SOFTPHONE & OFFICE PHONE

Softphone - Phone Settings

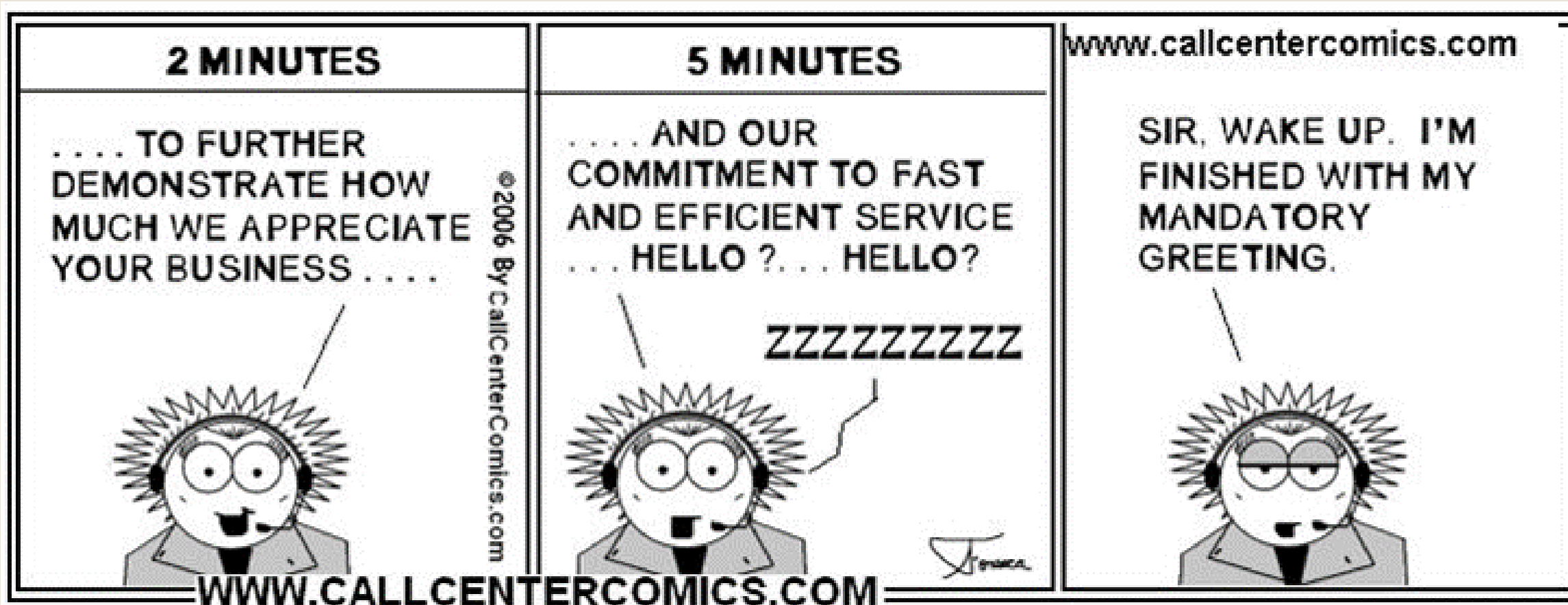


## PHONE SETTINGS

When working remotely, this is what the softphone looks like on your screen.

\*Notice your extension is displayed in the top right hand corner and the bottom left hand corner of the screen





## FRIENDLY GREETINGS

Answering a phone call in a friendly and polite manner sets the way a call will carry on.

## MAIN COMPONENTS TO A BASIC GREETING:

- Hello
- Frontier Supply Chain Solutions (Company Name)
- Your First Name
- Question: Ask for assistance i.e "How can I help you?"

**Ex: "Thank you for calling Frontier Supply Chain Solutions, my Name is Suzette, how can I help you?"**

# PHONE GREETING

Greeting on behalf of Frontier

**FRONTIER**

# TRANSFERRING A CALL

Top 3 Things to do  
Before Transferring  
Calls:

## WHAT TO DO *BEFORE* TRANSFERRING CALLS:

### **1. WHEN THEY'VE ALREADY BEEN TRANSFERED**

If you find out the caller has already been transferred, try to resolve their call without transferring. Sometimes callers get upset when they are transferred too many times.

### **2. CONFIRM THAT YOU ARE TRANSFERING THEM TO THE RIGHT PERSON**

Ask the person who you are transferring to and confirm if they can handle the caller's issue.

### **3. COMMUNICATE THE CORRECT DETAILS TO THE TRANSFEREE**

- If you have confirmed whom you are going to transfer to, explain to the caller why you are transferring
- Give them the correct name and phone# of who you're transferring to
- Make sure you call someone at the other end before you transfer
- Explain what the caller wants before you complete the transfer

# HOW TO PUT A CALLER ON HOLD

Letting the  
customer know

**69% of  
customers**

said they were  
on hold for too  
long when  
seeking help  
from a company.



## **PUTTING SOMEONE ON HOLD:**

- Advise the caller that you are putting them on hold
- Let them know how long the wait will be
- Do not put them on hold more than a couple of minutes without checking on them, retrieve the call and advise them they will be on hold longer
- Giving them the option of calling them back at a set time if you are unsure of getting a response to them right away
- Remember to thank them for holding



## DUTIES AND OBJECTIVES

Part of your role in Customer Service is tending to all the calls inbound and outbound to our general line. This part of the role is called Phone Reception work. We are the first contact and first impression through phone that represents Frontier, so we want to showcase our professionalism and efficiency.

# PHONE RECEPTION WORK

Answering the  
General Phone  
Line



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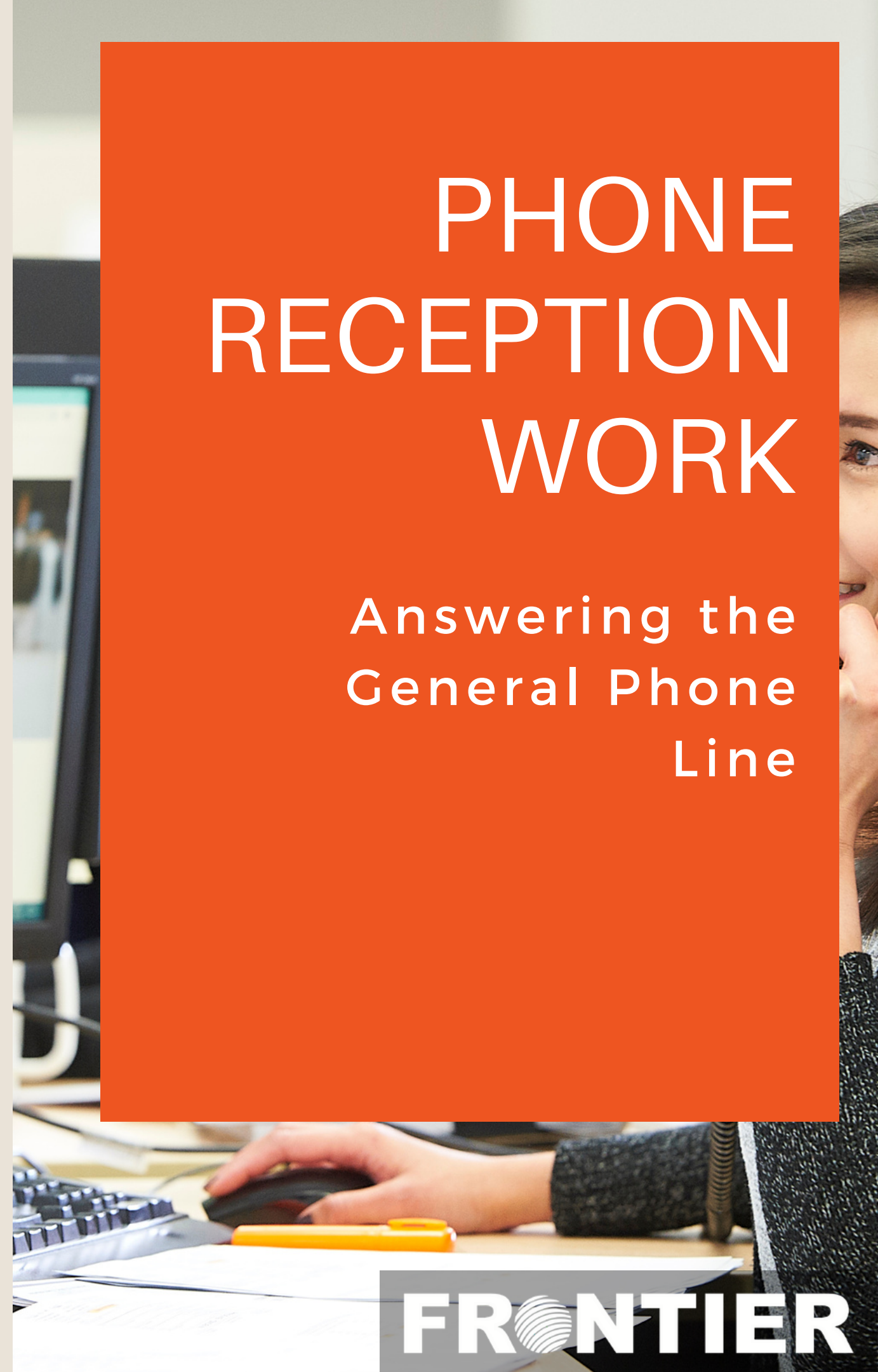


## GENERAL DUTIES INCLUDE:

- Welcomes visitors by greeting them on the telephone; answering or referring inquiries
- Directs visitors by using the latest updated employee and department directories; giving instructions
- Maintains security by following procedures; monitoring logbook; screening calls
- Maintains telecommunication system by following softphone and phone procedures and voicemail follow up
- Maintains continuity among work teams by documenting and communicating actions, irregularities, and continuing needs
- Contributes to team effort by accomplishing related results as needed

# PHONE RECEPTION WORK

Answering the  
General Phone  
Line





# PHONE RECEPTION WORK

Security and Screening Calls

## SECURITY AND SCREENING CALLS

Because we are in a service industry that depends on communication, we receive many phone calls, and some calls may not necessarily be for Frontier. Other calls can be malicious or “spams calls” that we would need to filter out before deciding to transfer the call to another employee.





## SPAM CALLS

Spam calls are similar to email spam in the sense that they're a form of unwanted communication. Spam calls and text messages are distributed in bulk and are, in most cases, unsolicited, which means they occur without any prior request.

## EXAMPLES

- Telemarketers, who are typically live agents hoping to sell legitimate (albeit, unsolicited) services.
- Robocalls, which deliver a pre-recorded voice statement with the same goal of making a sale. But, like email spam, robocalls are illegal without prior consent

In other words, a spam call can come from a telemarketer selling you a real product or service, or someone whose product or service is fake or doesn't apply to you.

Most people have suffered through the experience of being pummelled with dozens of annoying and unwanted spam calls that interrupt their day.

# PHONE RECEPTION WORK

Security and Screening Calls





# SPAM

## STEPS TO RESOLVING SPAM CALLS

- 1.** Identify the call is an actual spam call.
- 2.** If the call is a robocall, or pre-recorded voice statement, you can terminate the call immediately. Please remain calm and refrain from any obscene language during these calls as you are still representing the company and the call might be recorded.
- 3.** If you are dealing with a live agent, politely refuse and hang up. For example try saying something like: **"I'm sorry we do not need this product, Thank you"**
- 4.** Tell your peers about the call, this is helpful, in case they call again (some spam calls will continue to call until they receive an answer they want)



# PHONE RECEPTION WORK

Security and Screening calls





## SCREENING CALLS

Frontier's Upper Management are responsible for a lot of corporate decisions so certain calls will need to be screened before transferring to them as any unimportant calls will take up much of their valuable time.

Specifically, any calls that request to talk to the CEO of the Company, Business Owner, or specifically to Michael Butterfield, we should inquire what the call is about and decipher if the call pertains to him.

Once you have concluded that the call is for him, you can take a message and send the message to Mr. Butterfield via Teams or through email.

\*Please note that if Mr. Butterfield has spoken to this person already, he would have provided his direct extension or personal contact information during their communication. If they do not know him by name, there is a high chance this might be a spam call.

# PHONE RECEPTION WORK

Security and Screening calls



# PHONE RECEPTION WORK

Types of Phone  
Calls and What  
Department to  
Transfer to

## DECIPHERING WHAT THE CALL IS ABOUT

The best way to complete a call is to decipher what the call is about at the beginning of your conversation. The faster you figure out what they need, the more time you have on resolving their issue.

- PARS /IMPORT
- TRACKING NUMBER/TRACE A SHIPMENT
- ACCOUNTING/BILLING ISSUE
- PAPS/ EXPORT
- SALES CALL
- LINE HAUL/LOGISTICS CALL
- LOCAL COURIER CALL( WPG, SK OR TOR)
- HR OR HIRING
- APPLE EXPRESS

# TYPES OF PHONE CALLS

## PARS CALLS

## PARS CHECK PHONE CALLS

Ask for the PARS number and search for it in Visual Importer to check the Status.

<b>File is Accepted:</b>	"You're good to go at <u>(port of crossing)</u> ."
<b>File is Rejected:</b>	"The file was transmitted but is currently in rejected status. We will correct the issue and re-transmit as soon as possible. Please check our website for status updates or call back again before crossing the border."
<b>File is Transmitted:</b>	"Your shipment has been sent to customs, and we're just waiting for a reply. Please check our website for status updates or call back again before crossing the border."
<b>File is not Transmitted:</b>	"We have received your paperwork. It has not been processed yet but everything looks good. Please check our website for status updates or call back again before crossing the border."
<b>File has Notes that something is missing or wrong:</b>	If you know what is missing or wrong, ask for the missing information or discuss the problem with the caller. Give the necessary information to the person working on the file so they can finish it. If you're not sure what is wrong, transfer the call to the person or team working on the file so they can discuss it with the caller.
<b>Driver is waiting or about to cross:</b>	Tell them we will work on the file right away and offer to take their number so we can let them know as soon as it's ready. Tell the person or team working on the file that the driver is waiting or crossing soon and give them the driver's number to call once it's accepted.
<b>File is not in the system:</b>	Ask who the shipment is for and if you don't recognize the name, look it up in Trade Partners to see if it is our client and check which team it's assigned to. Ask when they emailed the paperwork and look to see if we have received the email, or transfer to the team to ask if they received it. If we have received the email, take a quick look at the paperwork to make sure everything we need is there, then tell them we are working on it and to check back again later.
<b>Client does not exist:</b>	Ask for other parties involved in the shipment (who is the shipper, consignee, purchaser, etc), and check all of those names in the Trade Partners. Ask when they sent the email and check to see if we received it, then look at the paperwork to see if there is anything recognizable on it that they may not have mentioned. Put the caller on hold and check with your teammates to see if they recognize it, since some clients will go by different names. If none of the names are recognizable to anyone, let the caller know that this is not for Frontier to clear. If we did not receive the paperwork, let them know that we do not recognize it as one of our clients, but offer that they can send the paperwork to us and we can take a look to make sure.

Please see information from our Weekend Training document on how to check PARS:

# TYPES OF PHONE CALLS

## PAPS CALLS

### PAPS CHECK PHONE CALLS

When a caller inquires to check their PAPS shipment, or shipments crossing to the US, simply direct them to our **Seattle Branch**. If they request for someone specific, please transfer them directly. If no one specific was mentioned, first advise them they are being transferred to another office, which is the Seattle Office called Frontier North America. Provide them with Seattle's direct phone number. If the caller is requesting for a toll free number, be sure to say that our **Seattle Toll Free number is only available during business hours, Monday to Friday**.

### PAPS CHECK PHONE CALLS

***Toll Free: 1-888-608-7783***

***Direct: (206)246-6580***

***EMAIL: PAPS@frontierscs.com***

***\*\*be sure to check our company directory for address and details  
(located on the shared server)***

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# TYPES OF PHONE CALLS

## Sales or Quote Calls



### **SALES CALLS:**

Sales calls are quite frequent and unexpected. Sometimes the callers are not aware they need to speak with the sales team, so often we need to guide them on the call to the correct department. There is a specific procedure with our sales team in dealing with providing quotes to new clients or potential clients, so we need to be precise and detailed to our sales team and advise the caller that our Sales Team will call back.

\*Please note that our Sales Team is in different offices and not just in Winnipeg. In order to fairly distribute a potential sale, we need to email the Sales Team the phone call so that whoever is available will respond. Do not directly transfer the call to a salesperson unless they have already been dealing a specific salesperson.

### **SALES CONTACT:**

[sales@frontierscs.com](mailto:sales@frontierscs.com)

[salesteam@frontierscs.com](mailto:salesteam@frontierscs.com)

# TYPES OF PHONE CALLS

Linehaul or  
Logistics



## LINEHAUL OR LOGISTICS

Any calls from our linehaul drivers or third party linehaul drivers/carriers can be directed to the logistics team. Sometimes even contracted backhauls will ask for the status of their shipment, those calls will also be for the logistics team.

# TYPES OF PHONE CALLS

Accounting/billing  
Issue calls



## ACCOUNTING/BILLING ISSUE CALLS

Our accounting department has group extensions for the following :

**Accounts Receivable : 606**

**Accounts Payable: 607**

Please make sure to appropriately direct them to the correct group. Unless the caller specifies for a direct person, then you can transfer over.

If the caller is requesting specifically for invoices, you can direct your calls to our **front desk, 128** or **[invoicerequests@frontierscs.com](mailto:invoicerequests@frontierscs.com)**, however if they are requesting for back up documents they would need to speak to the account manager of that Client.

## OTHER CONTACTS:

**[Accounting@frontierscs.com](mailto:Accounting@frontierscs.com)** (*Accounts payable or other accounting issues*)

**[AR@frontierscs.com](mailto:AR@frontierscs.com)** (*Accounts receivable*)

# TYPES OF PHONE CALLS

## HR/Hiring/Payroll Calls



### HR/HIRING/PAYROLL CALLS

Here are some examples of calls that can be transferred directly to our HR department:

- Any inquiries about Frontier hiring at any type of positions
- Inquiries about Payroll issues or concerns
- Any Employment Placement agencies requesting on employment
- Any inquires about employment history

(\*Please note that our HR department does not have a group extension)



# TYPES OF PHONE CALLS

Dispatch Calls  
(WPG, TOR, SK)



## DISPATCH CALLS (WPG, TOR, SK)

Dispatch calls can be quite confusing so you will have to make sure you can take control of the call and ask the following questions before deciding which team.

- Ask the caller which location this shipment is being picked up from
- Ask the caller which location this is being delivered

# TYPES OF PHONE CALLS

## Customer Service/Tracking Calls



## CUSTOMER SERVICE/TRACKING CALLS

If a caller is requesting to track their shipment, or has not received delivery of a shipment and would like to know where it is, these are tracking phone calls and can be directed to our Winnipeg Customer service team. Here are a few ways to get a hold of this team:

### CONTACTS:

#### Email:

- [fwcustomerservice@frontierscs.com](mailto:fwcustomerservice@frontierscs.com), OR
- [info@frontierscs.com](mailto:info@frontierscs.com)

#### Phone:

- internal extension: 770
- external extension: 0



## A FEW NOTES TO REMEMBER:

- Winnipeg Customer Service (CS) Team is only available:
  - Monday - Friday, 8AM - 6PM CST
- WPG CS Team handles all Parcel/PARS inquiries and other general inquiries
- We DO NOT have a Vaughan CS Team that handles Ontario clients. The WPG CS Team will forward over to them
- If there is a call that you are unsure which department to transfer the call to, WPG CS Team can find out for you during business hours

## SCRIPTS

Dealing with parcel calls can be a bit of a hassle, especially during the weekend. If you follow some of the scripts listed on the following slides, you should be able to guide the caller to contact Customer Service during the appropriate business hours.

# PHONE SCRIPTS

Phone Scripts for the Weekend and Evening Staff



## 1. SWITCHING YOUR GREETING WHEN YOU ANSWER CALLS:

It will advise the caller from the beginning that they have reached the wrong department. Establishing your department may clarify the situation early in the call.

### EXAMPLES:

*"Thank you for calling Frontier, you have reached the brokerage department, how can I help you?"*

*"Frontier imports/PARS department, how can I hep you?"*

# PHONE SCRIPTS

Phone Scripts  
for the  
Weekend &  
Evening Staff





## 2. ADVISING THE CALLER, YOU ARE NOT CUSTOMER SERVICE

If they start announcing their parcel-tracking issue after your greeting, try to remind them again, as soon as you can, that they have reached a department that handles ONLY customs clearance. Be sure not to interrupt the caller in midsentence as they can construe this as rude and inconsiderate and might escalate the situation. I would kindly remind them as soon as you hear them pause or break in the sentence.

### EXAMPLES:

*"I apologize for interrupting; unfortunately this is the customs clearance department..."*

*"I am sorry for the interruption but I would like to kindly remind you that you have reached our brokerage department and I am unable to assist with parcel deliveries"*

# PHONE SCRIPTS

Phone Scripts  
for the  
Weekend &  
Evening Staff



### 3. SYMPATHIZE WITH THE CALLER:

Just showing the caller that you empathize with them can de-escalate the scenario. Showing compassion goes a long way!

#### EXAMPLES:

*"I am sorry to hear that, I really wish that I could help but unfortunately you have reached the Customs clearance department and we do not have access to our Parcel Tracking system..."*

*"I'm sorry to hear that you're having difficulties..."*

*"I understand how frustrating this problem has been for you, but I would suggest for you to contact us back when our Customer Service team is available to assist you further."*

# PHONE SCRIPTS

Phone Scripts for the Weekend & Evening Staff





#### **4. OFFER TO TAKE A MESSAGE FOR THE CALLER:**

If the caller refuses to call back, or prefer to speak to someone (caller might want to vent his/her/their frustration) here are a few scripts you can use:

#### **EXAMPLES:**

*"Again, I apologize that you had to deal with that. What i can do for you is document all of this information and advise the Team to look into this first thing on Monday morning."*

*"Let me take this information down for you and advise our Customer Service team to contact you when they first come in and access the issue."*

# PHONE SCRIPTS

Phone Scripts  
for the  
Weekend &  
Evening Staff





## NOTES TO REMEMBER WHEN TAKING A MESSAGE FOR CUSTOMER SERVICE:

When taking a message for Customer Service, be sure to ask them for the following information:

- Name(s)
- Tracking Number (Usually starts with PFS or LDC)
- Phone number of email address to contact back

Then email all of these inquires to [fwcustomerservice@frontierscs.com](mailto:fwcustomerservice@frontierscs.com)

## ALTERNATIVE SCRIPTS YOU CAN USE:

*"Thank you for calling Frontier, you have reached the afterhours brokerage department, unfortunately our Customer Service department is currently closed and will not be available until Monday...."*

*"Unfortunately, I have limited access to track your package, it would be beneficial that you contact us back again during the weekday so that we may better service your tracking needs."*

# PHONE SCRIPTS

Phone Scripts  
for the  
Weekend &  
Evening Staff





# Phone Based Customer Service

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