# Customer Service: When to pick up the phone

In most Account Management interactions email is the way to go, because it’s efficient and allows us time to give questions thought before we respond. However there are plenty of situations where the right play is to pick up the phone, such as to...

* Remove uncertainty
* Break bad news
* Reverse a bad rating
* Pitch a sale idea
* Sidestep unreadable text
* Communicate “off the record”
* Gauge reactions
* Pin down non-responders

## Examples

### Pick up the phone…

* When customer gives any indication that they did not understand your email
* When your email would go beyond 5 paragraphs
* When the topic requires back-and-forth confirmation
  + e.g. you need to ask questions about their problem, and then those questions will need further clarification
* (Subjective) When you know the customer prefers it (e.g. they always call you)

### Direct the Customer

* Don’t reject the customer’s negative statements; redirect them.
* Sidestep “he said/she said” situations. Don’t contradict; respond “What I see is \_\_\_\_”, followed by next steps.
* Use partnering language instead of “us” and “them” language
  + “Let’s \_\_\_\_”
  + “What we want to do next is \_\_\_\_”
  + “Go ahead and \_\_\_\_”
* Use visual language when guiding
  + Colors
  + Shapes
  + Locations

### Lead the Interaction

You are an authority on all things Vision Internet. They called you. You lead the interaction.

### Think on your feet

* There are times when it’s okay to ask the customer Vision-specific information!
  + You want to communicate, “I can look this up fairly quickly, but if you happen to know off the top of your head if your account has [\_\_\_\_\_\_ feature] I can answer more immediately.”
  + You **don’t** want to communicate, “I’m not really sure, so I’m hoping you can help me answer it.”
* There are times when it’s okay to admit you don’t know the answer to their technical question!
  + Communicate: “I don’t have that answer memorized, but I’m confident we’ll quickly arrive at the answer together if we open it up and look right now.”
  + Don’t communicate: “I don’t know.”