

Boosting your customer callbacks

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Ageas, the crew behind you.

Keen to boost your callbacks from answerphone messages? It's all about balance and remembering the professional tips that will help clients to understand the value of returning your call.

There are three things you need to consider when calling customers – your rapport, your message, and your expectations – and we're going to explain how you can improve all of your relationship-building callbacks by adjusting those balances, here.

Is this really necessary if you're a seasoned broker?

Well, think of it as a refresher. If you've been making relationship calls over the phone for years, it might be useful to share these notes along with your own advice to other colleagues.

And if you're starting out or have a new campaign you're following up, there may be a nugget of advice in here that will make all the difference.



Prepare thoroughly for every call

Start by having an excellent reason for being on the phone – not just a good reason, an excellent reason: you're an expert and you have useful information that can help the clients who call you back.

- Having confidence in yourself, and your aims, will affect your demeanour and give your voice and message the gravitas they need to be genuinely inviting.
- People are reassured by being in the care of experts, people who can help them achieve their goals, and all too often the 'start of a relationship' turns into 'a dead phone message' because the person who's left the message doesn't see the call as anything more than a 'maybe'.



Don't underestimate the value of preparing yourself for the call

It's tempting, when you're good at your job and feel confident about the subject, to make outgoing calls with little preparation.

But while you may know your topic backwards, how will you handle an 'irrelevant' question from your client or a diversion into a related subject if the phone does get picked up?

Make a note of what you'd like to achieve, think about the answers to some common questions. Don't just think about them – jot down bullet point notes to check you're covering all the bases.

Develop the right rapport

Rapport is created by commonality – it's one person's natural reaction to interacting with another. So, even though you're not there in person, how can you build a rapport over the phone?

Well, the chances are, your phone or laptop has a recording function. In private, record yourself. Make a call, make that fake phone sign with your thumb and little finger and make a phone call to yourself – record how you sound, because that's your starting point. That's the best way to see how much you can improve your tone over the phone.



Style is important

Style is more important than substance. It's hard to trust someone who sounds like this: "Er, yeah, um, hi....it's, um, John here. We, er, we were going to, um, catch, up sometime and, er, you said call you maybe? So, yeah. Um, call me thanks bye." But those calls do happen.

- Be critical of the way your voice sounds.
- Always speak slightly more slowly than you planned to.
- Speak clearly, don't be afraid to pause between your introduction and your message.
- Be professional and transparent and clear about your invitation to return the call.

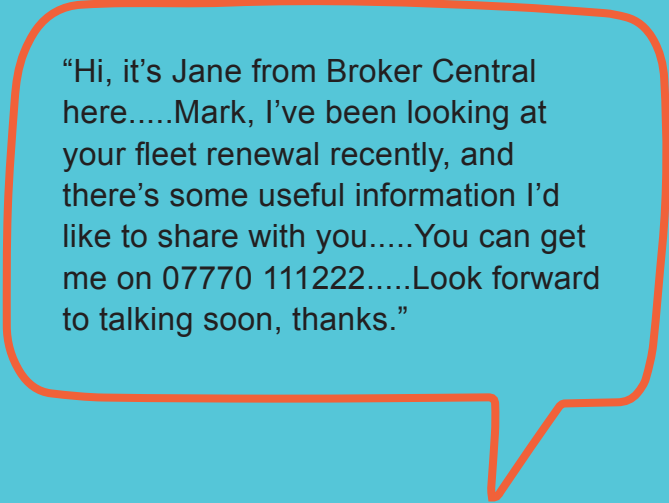
Record your call, to yourself. Try lots of different approaches. You may be surprised at how many different ways you can deliver the same message, without comprising your own style.

Quick tip from the crew to you

There's nothing worse than a fuzzy message that rambles on for three minutes, which you have to repeat JUST to get the number. Say it, say it clearly, say you'll repeat it. (Don't forget to repeat it).

Find the right balance in your message

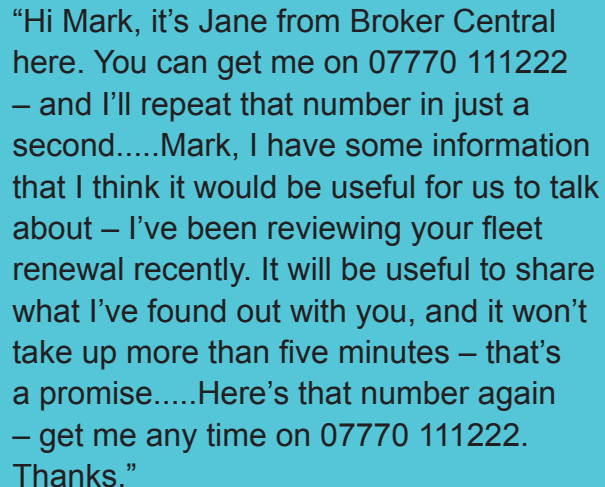
Practice this message as an example
(the extra spaces are where you need to
pause. You know what you're going to say,
but your clients need a moment to think
about what they're hearing).



"Hi, it's Jane from Broker Central
here.....Mark, I've been looking at
your fleet renewal recently, and
there's some useful information I'd
like to share with you.....You can get
me on 07770 111222.....Look forward
to talking soon, thanks."

As a style, you may be nervous that the 'firm' approach to a message will sound too 'practiced'. It won't. It will sound professional.

This is a slightly longer version:



"Hi Mark, it's Jane from Broker Central here. You can get me on 07770 111222 – and I'll repeat that number in just a second.....Mark, I have some information that I think it would be useful for us to talk about – I've been reviewing your fleet renewal recently. It will be useful to share what I've found out with you, and it won't take up more than five minutes – that's a promise.....Here's that number again – get me any time on 07770 111222. Thanks."

Again, it may sound like a sales pitch – until you hear it played back. It's not 'salesy'. It's a transparent, clear, and fair invitation, but because you've delivered it professionally, and introduced the notion that "I'm going to benefit by returning this call..." – it's also highly effective.

What's important now, is that you manage your client's expectations – and your own – in advance.

Set the right expectations

If you're working through a list of clients, perhaps to update details or plan a review, then you can test and learn, which approaches work best. The tip here is to be consistent in not only what you're saying, but also how you say it. That way, you see which calls work better than others. But here's the key:

- People like to know 'what's in it for them?' Be fair, provide the reason for returning a call and make sure it is always a valid reason.
- People want to know what your 'ask' is. Be clear about the time involved in a return call. Say it's five minutes of their time, make that time about giving an overview and booking a full appointment.
- People need to know your rationale. Always be transparent. There are firm rules on calling clients as set down by the FCA, and you'll find them all online (search for FCA COBS 4 – Communicating with clients).

Quick tip from the crew to you

Say your phone number early on, speak it clearly, and SAY that you'll repeat the phone number at the end of the call. This does two things: it sets up in your client's mind the fact there's a need to return the call. And if you've said you're going to repeat the number, your client is now free to concentrate on what you've got to say.

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