Courtesy

The way you sound.

Behavior marked by excellence of manners, social conduct and respect for others

Expected Behavior	Supporting Behavior	Supporting Behavior	Supporting Behavior
Identification	obtain the full name of the customer (and relationship to account holder)		
Polite & Professional	choose proper words to present professionalism throughout the interaction, for example, courtesy words	appropriate energy level displayed throughout the call	further personalize by using the customer's name
Tone	be friendly, positive, upbeat, engaging, and inviting	be approachable, supportive and caring	use appropriate tone throughout the interaction
Respect Diversity	maintain professional demeanor when speaking with or about other depts, employees or customers, etc.	demonstrate patience and respect with all customers through word choice, actions, and demeanor	
Clear Communication	speak at a proper pace throughout the call; when correspondence is written, utilize proper grammar, punctuation, spelling and sentence structure	provide clear communication - yield to customer, apologize if you accidentally speak over the customer	direct all communication to the customer while on the call
Hold/Transfer Technique	ask permission/thank the customer	offer customer explanations, updates, and phone number	use warm transfer, when possible and appropriate
Closing	use appropriate closing statement	tailor closing to the interaction	leave a lasting positive impression

Concern

The words you use.

Behavior marked by understanding, sensitivity, and sharing the feelings of another

Expected Behavior	Supporting Behavior	Supporting Behavior	Supporting Behavior
Build a Relationship (Connection)	demonstrate or take an interest in your customer throughout the interaction	engage with the customer regarding their business needs and help the customer feel good about the interaction	honor commitments made by you and the company
Empathy	acknowledge the customer's emotional state throughout the interaction	take special care to defuse upset or angry customers	
Active Listening	restate and clarify the customer's needs	take care to ensure customer will provide information one time only	listen to fully comprehend the customer's need
Own the Interaction	demonstrate a willingness to help by using a specific ownership statement tailored to the interaction	take full responsibility and show initiative so as not to unnecessarily escalate	use positive word choices throughout the interaction to reflect what we CAN do for the customer
Gather the Details	ask pertinent and probing questions	ask open ended questions to clarify a point	probe to find the true reason for the contact

Timely Resolution

Behavior marked by efficient and effective use of company and customer time

Expected Behavior	Supporting Behavior	Supporting Behavior	Supporting Behavior
Easy to do Business With	only transfer the customer when necessary, limit unnecessary contacts	be flexible and responsive to the customer throughout the interaction	respect the customer's time, pace the interaction to match your customer
Pro-Active	use expertise to anticipate customer needs (one-step ahead)	be empowered to make decisions	
Appropriate Length for the Interaction Type	limit hold duration/delayed response/long silences throughout the interaction	respect the company's and the customer's time by moving efficiently through the interaction	provide efficient and concise explanations and clarifications for customers
Control the Interaction	be attentive - stay on topic throughout the interaction	be ready to receive the call	use proper flow; skillfully refocus if the interaction goes off track

Technical Knowledge

Behavior marked by accurate and complete adherence to policies and procedures. Provide correct information and thoroughly educate the customer

Expected Behavior	Supporting Behavior	Supporting Behavior	Supporting Behavior
Verify Customer Information	fully authenticate the customer	update contact information where appropriate	
Fully resolve reason for customer's contact	process the transaction properly	follow policies and procedures	
Educate the Customer	provide accurate information throughout the interaction	explain "the why"	
Adding Value to Customers	offer various programs and services	provide options/next problem prevention	
Use resources and tools	seek information from all resources	use all available tools advantageously	
Documentation	fully note the appropriate system(s)	include specific and relevant details	
Summarize the Interaction	recap the details	set expectations accurately and appropriately for all ensuing action	take accountability by appropriately following up including sharing accurate time frames