THE CUSTOMER EXPERIENCE EXPERTS

# Best Practice
# Call Handling Techniques

***Practical training for frontline staff***

*Good call handling doesn't need to be complicated. From building skills for the first time to refreshing long-established habits, strong call handling starts with the fundamentals.*



This practical workshop takes frontline staff through the foundations of handling a customer call, with simple techniques for opening the call, understanding the customer's needs, keeping the conversation on track and guiding it towards a clear outcome.

## Your frontline team will come away with:

- A simple structure they can apply to everyday calls
- Practical techniques for keeping conversations on track
- Greater confidence in situations where they're not sure what to say or do next
- Strategies for balancing customer needs with professional boundaries

## Built around your workplace

This workshop will be tailored to your organisation and the types of customer conversations your team handles, with practical scenarios that make the learning relevant to their day-to-day work.

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**INTENDED AUDIENCE**

**Frontline staff**

**DELIVERY MODE**

**Onsite or video conference**

**DURATION**

**½ day OR virtual equivalent**

**GROUP SIZE**

**Approximately 15 participants**

## Aim

To strengthen participants' ability to confidently manage customer conversations by understanding needs, guiding interactions, managing expectations, and maintaining professional boundaries.

## Benefits

- Improved first contact resolution through more effective needs discovery, tailored responses and clearer next steps.
- Reduced repeat contact and avoidable escalations by helping customers get complete, relevant information the first time.
- More efficient call handling, with staff better able to manage complex conversations, set boundaries and close calls professionally.
- A more consistent and customer-focused experience that supports stronger customer confidence, satisfaction and trust.

## Course content

- Taking ownership of the interaction from the beginning
- Clarifying needs through purposeful, layered questioning
- Personalising calls while maintaining appropriate professional boundaries
- Supporting first contact resolution by anticipating follow-up questions
- Using signposting and empathetic interjection to maintain control
- Recognise when a conversation is moving beyond the purpose of the interaction and using language that naturally redirects conversations
- Setting respectful boundaries while ensuring the customer still feels heard
- Confidently and politely wrapping up a conversation without feeling abrupt or dismissive.

## Learning outcomes

By the end of the workshop participants will:

- Begin conversations in a way that builds rapport, confidence, and ownership
- Use a layered questioning technique to clarify needs
- Provide clear, complete, and tailored responses that manage expectations
- Recognise when conversations are moving beyond customer needs
- Use respectful language to wrap up a conversation with confidence

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