

Delivering The BEST CARE to Our Customers

Service Excellence is the ability to provide predictably positive experiences that meet or exceed our customer's expectations.

The **BEST CARE** model provides a shared easily understood methodology for how staff members across Client Services connect with and engage our end-users, vendors, as well as one another. This model contributes directly to the building of trust between individuals.

This involves four stages –

Connecting with the customer;

Asking questions to gain understanding;

Responding appropriately; and

Ensuring satisfaction.

As a strategy toward re-branding the **MM Service Experience**, telephone scripts will be built to:

- Ensure a consistent response from Client Service reps which reflects that we want to deliver the BEST CARE to our customers
- Position Client Service reps as Service Ambassadors for MM
- Brand the Client Service telephone customer's experience in a customer-centric way
- Be used by every employee with every customer every time

Connect with Caller Client Services Scripts

Action Step

Sounds Like

1 Greet the Caller

- Buffer statement
- Department name
- Ask for name
- Introduce self
- Ready to help

Good morning. You have reached Client Services and your call is important to us. May I start by asking for your name?

Hi <Name>

My name is _____ and I am ready to help you.

2 Provide Assurance

- Use one of these statements

I'd be happy to help you with that.

Absolutely. I can help you with that.

I can definitely do that for you.

Sure. I can do that for you.

I can certainly help you with that.

3 Gain Permission to Ask Questions

<Name>, I'm going to need to ask you just a few questions to get started. Would that be okay?

~ Or ~

<Name>, can I ask you a few questions so that I can get this resolved as quickly as possible for you?

~ Or ~

I'll just need to get some information from you in order to pull that up in our system if that's okay with you?



Whenever someone responds to your question, respond with "Terrific" or "Great" or Thank you.

Asking Questions

Client Services Scripts

Action Step	Sounds Like
<p>1 Provide Benefit to answering question</p> <ul style="list-style-type: none"> a. Explain how the information will help expedite the resolution b. Makes the caller feel respected 	See detailed scripts
<p>2 Avoid interrogations</p> <ul style="list-style-type: none"> a. Too many closed ended questions can make the caller defensive and will start to feel like an interrogation b. Fosters a climate of helpfulness and capability 	See detailed scripts
<p>3 Respect the Caller</p> <ul style="list-style-type: none"> a. Every time they answer a question for you, say <i>Thank you</i> b. Occasionally use their name when you are asking multiple questions 	See detailed scripts

Respond Appropriately

Client Services Scripts

Action Step	Sounds Like
<p>1 Provide Empathy</p> <ul style="list-style-type: none"> a. Acknowledge the customer's point of view before you respond b. Use a blameless apology if caller is upset 	<i>I'm sorry to hear that you haven't had a good experience. My goal is to make sure that you are completely satisfied with this call today.</i>
<p>2 Provide Information</p> <ul style="list-style-type: none"> a. Proactively provide the caller with appropriate information b. Anticipate their informational needs — Avoid making the caller have to ask you for basic information 	See detailed scripts
<p>3 Set Realistic Expectations</p> <ul style="list-style-type: none"> a. Tell the caller what you can and cannot do b. Explain limitations and possibilities early in the conversation to avoid surprises or disappointments later 	See detailed scripts
<p>4 Personalize the call</p> <ul style="list-style-type: none"> a. Add the words <i>for you</i> when you state an action that you are going to take for the caller b. Use the caller's name at least twice during the call 	See detailed scripts

Ensure Satisfaction

Client Services Scripts

Action Step

Sounds Like

1 End by Ensuring Satisfaction / Agreement

- a. Offer more help before ending call
- b. Ask about survey
- c. Thank caller by name

Before you hang up, is there anything else that I can help you with while you have me on the phone?

Providing our end-users with the BEST CARE possible is our goal. Your feedback will allow us to monitor our progress toward reaching that goal.

Can I email you a brief survey about your level of satisfaction with this call?

Thank you <Name>. and enjoy the rest of your day.

Ask and Respond Appropriately

Purchase Orders

- 01 – Expectations
- 02 – Incorrect Vendor
- 03 – No PO / Invalid PO
- 04 – Order Status
- 05 – Expedite PO
- 27 – Returns
- 33 – Procurement Card

Purchase Orders

01 – Expectations

Not getting processed
it is in match exception

Connect with Caller – refer to poster

Ask Questions

The Purchase Order number is the quickest way to access that information. Do you happen to have the Purchase Order number?

Reply with Thank you.

Respond Appropriately

I am showing that Purchase Order in our system, but there appears to be an issue with your invoice not matching the PO. Let me review it closer to see what is causing the hold.

It will take just a few seconds for me to review that for you.



CS rep should reveal to end-user what the issue is if you can determine why it is in match exception.

I am not seeing anything definitive on my screens so what I'd like to do for you is to check with the specialists that work specifically on these issues. That will ensure that we get an answer and get this resolved ASAP for you.

Let me provide you with a ticket number in the event that you need to follow up with us for any reason. The ticket number will enable all client services reps to be able to access this record in our system for you and can therefore provide you with information/updates.

Ensure Satisfaction – refer to poster

Purchase Orders

02 – Incorrect Vendor

Connect with Caller – refer to poster

Ask Questions

Do you have the Purchase Order number so that I can look that up for you?

Reply with Thank you.

Respond Appropriately

I am showing that Purchase Order in our system, but the vendor name listed is different. Can you confirm the dollar amount of that PO just to be sure we are looking at the correct one?

The dollar amount matches, but it appears that the wrong vendor name was entered. The good news is that I can actually get this resolved quickly by contacting the Buyer directly for you.

If you can you provide me with the correct vendor name, address, and the items being purchased, I'll go ahead and get this correction started for you with the Buyer.

Ensure Satisfaction – refer to poster

Purchase Orders

03 – No PO / Invalid PO

Connect with Caller – refer to poster

Ask Questions

I'll call the vendor to get the updated shipping information for you and will call you back. What is the best number to reach you at today?

Reply with Thank you.

Respond Appropriately

I spoke with the vendor and they stated that they did not get a request. I have confirmed the fax number to be sure that the next request goes through.

I want to be sure that we use the best shipping method for you. Before I speak to the Buyer, is there a revised timeframe for when you need to receive these items?

I will notify the Buyer of the non-receipt status of this order and request that they follow up with you directly. Would you like me to cc you on that email?

If they do not have a PO number

Do you have a req ID number? Can I have your User ID?

Ensure Satisfaction – refer to poster

Purchase Orders

04A – Order Status No issues

Connect with Caller – refer to poster

Ask Questions

The Purchase Order number would provide us with all of the required information. Do you happen to have that available?

Reply with Thank you.

Respond Appropriately

It will take just a moment for me to access that PO and review the comments screen to be sure that there are no outstanding issues with this order. Would you mind holding for just a minute while I do that for you?

I have read through everything and it appears to be in order.

I'd like to confirm the items included on that PO with you before calling the vendor. Would that be okay?

Read through and confirm the contents of PO

Call vendor to check on status. Then call end-user to update

<Name>, I was able to reach the vendor and I have good news. The products were shipped. Provide date, shipping method, whether they were already signed for or provide the tracking number if not yet received, location of package according to tracking number.

Ensure Satisfaction – refer to poster

Purchase Orders

04B – Order Status Back Order / Discontinued

Connect with Caller – refer to poster

Ask Questions

The Purchase Order number would provide us with all of the required information. Do you happen to have that available?

Reply with *Thank you.*

Respond Appropriately

It will take just a moment for me to access that PO and to read through the comments screen to be sure that there are no outstanding issues with this order. Would you mind holding for me for just a moment while I do that?

Wait for an answer

Thanks for holding <Name>.

I have read through everything and it appears that <item> has been backordered / discontinued.

If backordered – The new shipment date is expected to be...Does that timeframe still work for you?

Would you like me to speak to the Buyer and have them source it from another vendor for you?

I will send an email to the buyer and will cc you on that email as well. Can I have your email address?

Ensure Satisfaction – refer to poster

Purchase Orders

05 – Expedite PO Needs PO set up immediately

Connect with Caller – refer to poster

Ask Questions

Could I first ask for the reason that this Purchase Order set up needs to be expedited?

Reply with *Thank you.*

If valid reason is provided, continue with: I'll need the requisition ID number for this order. Do you have that available?

Take all required information to complete PO set up.

Reply with *Thank you.*

Respond Appropriately

I have all of the information required. At this point I'll work directly with the Team lead in our Purchasing Department to expedite this for you.

!! *If reason is that they have had a bad prior experience and do not want to repeat that experience...*

I'm sorry to hear that you had a negative experience with us in the past. I do want to reassure you that this is not typical. Expediting a PO set up is something we can do on an exception basis but it is resource intensive and a fairly involved process.

I would like to ask that you give us another chance first so that we can regain your confidence. If your PO is not set up in 3 days, you can email me directly and I will follow up with you personally.

Will that work for you?

Ensure Satisfaction – refer to poster

Purchase Orders

27 – Returns

Connect with Caller – refer to poster

Ask Questions

Respond Appropriately

The good news is that all of the information you need to do a return is provided on Partners Pulse. I can either tell you how to navigate to that page

<http://pulse.partners.org/forms/returns.htm>

or if it's easier, I can email that link directly to you right now so that you do not have to spend time navigating through Partners Pulse looking for it.

Which would you prefer?

If emailing: Could I ask for your email address so that I can send that to you right away?

Reply with *Thank you.*

Ensure Satisfaction – refer to poster

Purchase Orders

33 – Procurement Card

Connect with Caller – refer to poster

Ask Questions

What information would you like?

Respond Appropriately

The person who oversees this is the actually the Procurement Card administrator. But I'd like to help you to avoid having to make another call. I can take all of the required information from you right now and then I will personally get it to the administrator for you.

If I can just ask for the following information...

That's everything I need. As I said, I will forward this to the right person and you should get a confirmation from that area once it's all set.

!! Take all of the information from end-user and then take to the appropriate person personally.

Reply with *Thank you.*

Ensure Satisfaction – refer to poster