

EAP PY25 Customer Service Training

Bria Rudolph
Energy & Utilities
Customer Service
Representative

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OUR AGENDA

Discussion Points

- Customer Service Basics
- Customer Communication Tips
- Best Practices



CUSTOMER SERVICE BASICS

- ✓ Be aware of and sensitive to a customer's fragile emotional state and/or financial situation
- ✓ Be compassionate and kind
(Without crossing the line)
- ✓ Maintain a united front with IHCD and LSP colleagues
- ✓ Offer other possibilities for help when applicable
- ✓ Admit you don't know... and ask for help when you need it

AWARENESS OF AND SENSITIVITY TO CUSTOMER'S EMOTIONAL AND/OR FINANCIAL SITUATION

When customers first reach out, they may be reaching out during an emotional and/or financial crisis. Their reality may look like this...

- Many families and individuals find it impossible to afford even the basics – like rent, utilities, hygienic products, and groceries.
- An unexpected expense – say a medical emergency or car repairs – could put a household at risk of homelessness.
- Thousands rely on diaper banks, food pantries, and government programs – and aren't always treated with dignity and respect by the employees and volunteers associated with those agencies/organizations.

THAT REALITY MEANS...

Customers may feel or believe:

- There is a power imbalance between you and them, which is unfair, unjust, or even working against them.
- Scared and anxious because you (this program) are their last hope.
- Pressed for time because of obligations with work, family, and appointments for other programs/services.
- They've already spent a lot of time, energy, and patience on multiple applications and intake appointments. It all feels like unnecessary hoops they must jump through just to obtain basics for survival.
- Ashamed or embarrassed because they need help.

And there may also be a significant barrier preventing them from understanding how to navigate programs – like limited skills with literacy, technology, and/or the English language.

AS A RESULT, KINDNESS AND COMPASSION ARE VITAL

I'm sorry to hear your power is disconnected. I can help you with completing an application or provide additional resources.

Thanks for taking the time to help me understand your concerns.

I can't imagine how stressful that must be. I'm glad I can help.

It's great you're applying for help. You're right inflation has made it hard!

I hear you saying you're ashamed to ask for help. Everyone needs support sometimes. That's why we're here to help.

Please tell me more about that situation, so I can investigate this for you.

LISTEN FIRST...

Often a customer just wants to be heard first. They want you to hear their story. That story might include details about their negative experience with getting assistance in the past, a recent job loss, a medical emergency, or a miscommunication with their utility company.

1. Listen... without losing 30 minutes of your day or letting them spiral into a rage.
2. Paraphrase back to them the parts of their story that apply to your program.
 - a) This helps them know you were really listening.
 - b) It also refocuses the conversation on the real reason you're communicating with each other.
3. Then they might be more receptive to the information you provide.

BUT TRY TO AVOID...

Guaranteeing Assistance or A Positive Outcome

If you apply for EAP, you'll probably get your whole bill paid off. They'll get your lights back on today.

I know you're eligible. You just need to apply.

Using Technical Jargon or Pretentious Wording

The LSP handles the transmittals to the utility vendors.

Due to your failure to comply with program policy, your application was denied. Ergo, you will have to reapply.

Throwing IHCD or LSP Staff Under the Bus

I can't believe they denied you. They really messed up, and I'm going to make it right.

They should have never said/done that to you.

Adding Your Personal Commentary

Your family deserves this because you actually work.

They should move your application to the top of the stack.

It's only \$50.

OFFER OTHER POSSIBILITIES FOR HELP WHEN APPLICABLE

- Offering other avenues to get help can lead customers to a better quality of life AND provide a “Plan B” if they are being denied by another program.
- Suggestions could include:
 - Other IHCDA programs, like Weatherization or IERA
 - Other programs/services with the Community Action Agency near them
 - Township Trustee
 - Utility Vendor Opportunities for Energy Efficiency Assistance and Payment Plans
 - 211 Resources

This needs to be done with a delicate touch, so it doesn't seem like you are trying to “get rid of them.” If the customer doesn't seem open to other options, don't force it.

ADMIT YOU DON'T KNOW... AND ASK FOR HELP WHEN YOU NEED IT

It's totally acceptable to tell a customer, "I need to confer with my team about this. I'll call you back by..." OR "Let me look into this a little more. I'll get you an answer by..."

We are a team, so reach out for help!

Plus, it shows the customer you want to spend some time on their concern/question and do things correctly.

REMEMBER: PRACTICE SELF-CARE AND GET SUPPORT W/ CONCERNING INTERACTIONS

- Self-care is important. Don't just be kind to customers... be good to yourself too.
- If a customer writes or says something that is concerning, don't be the only one who knows about it. Share that information with your manager or supervisor.
 - Some examples of when to share:
 - Harassment/discrimination/threats
 - Suspicion of fraud
 - Mental health concern
 - Abuse/neglect
 - Unsafe conditions

TIPS FOR CUSTOMER COMMUNICATIONS

Timing

Consistent (Templates/Scripts)

Friendly Bookends

Providing Helpful Information

TIMING

- Communicate Within Standard Business Hours
 - Make sure voicemail inbox is cleared out for customers to leave one.
 - Try to make yourselves available as best as you can for customers.
- Prompt Response (within reason)
 - Reply within 24 to 96 hours, when possible, when responding to voicemails, emails, or phone calls where you had to get additional information and call back.
- Call After 9 AM to avoid waking the household
- Make sure you have time for a lengthy call and are ready to be patient/compassionate before you dial

CONSISTENT

- Use Templates for Written Communications
 - You won't forget important info.
 - You'll be consistent.
 - You'll save time.
 - You can add personal touches when needed.
- Use Scripts for Phone Calls
 - Use your templates to guide phone calls for the same reasons or prepare notes to stay on message when dealing with a unique situation.
 - Don't just read to the customer.

FRIENDLY BOOKENDS

Greetings	Closings
Thanks for calling/contacting [agency name here].	Take care.
I am happy to help. Tell me about your concern.	Do you have any other questions for me?
What can I help you with today?	I appreciate your feedback. It helps us all improve and learn.
Thanks for taking some time to speak with me today.	I hope this phone call was helpful for you.

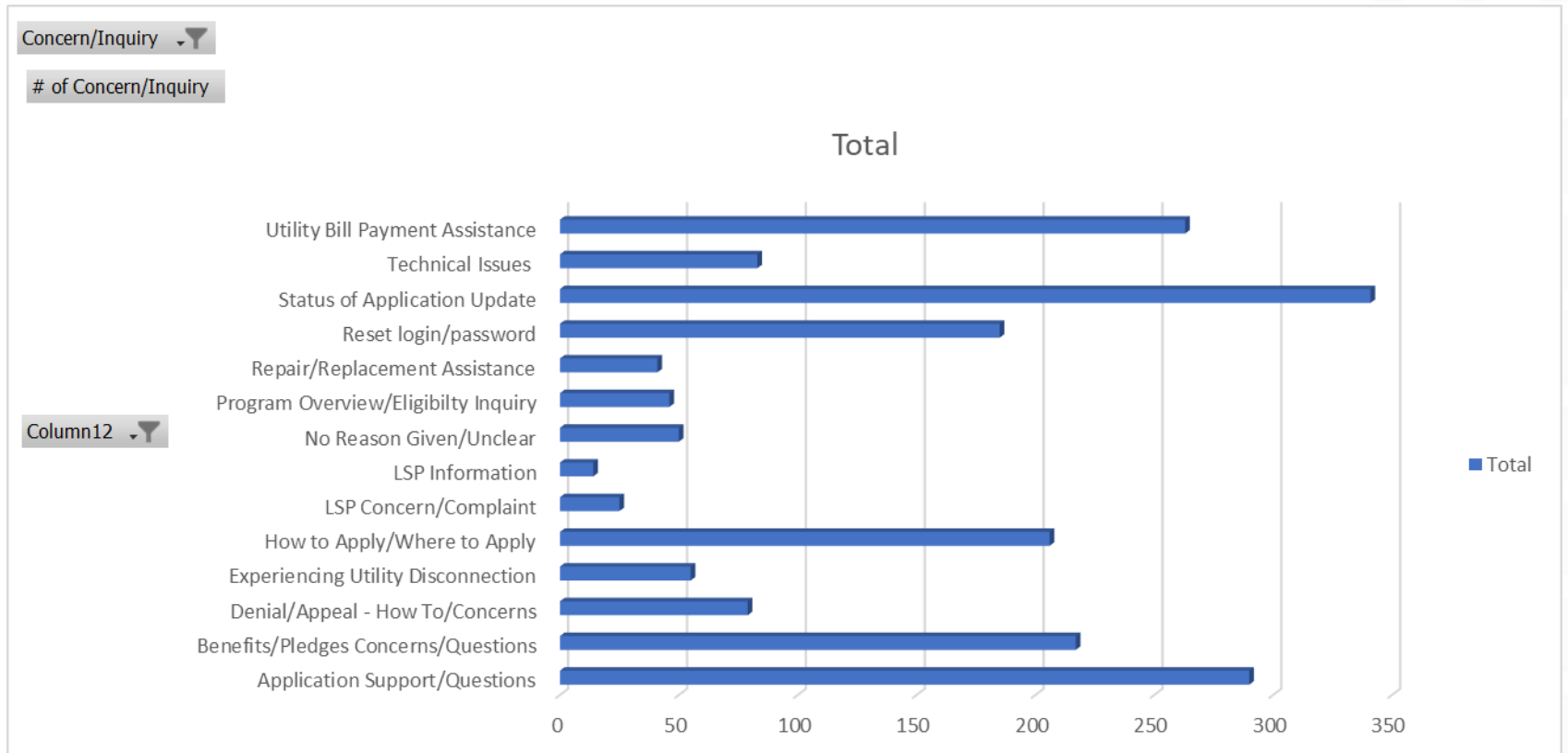
FRIENDLY BOOKENDS WARNING

Be mindful – If they're being denied or just got disconnected by their utility company, you probably should not close with "Have a great day."

PROVIDING HELPFUL INFO

- Educate your applicants
- ❖ Ex: If an applicant completes a form incorrectly, but it is clear they are trying to do it correctly, explain what is incorrect about it and what is needed to determine eligibility.
- ❖ Ex: When sending letters requesting additional information, don't just put "return these documents to us." Make sure to have a mailing address, e-mail, or any other contact information on how to return it.
- Ensure EAP webpage is up to date and accurate.
- Ensure appropriate documents are up to date.

CUSTOMER CONTACT DATA





SHARE YOUR BEST PRACTICES

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What are your best practices or tips for providing excellent customer service to EAP clients?

ⓘ Start presenting to display the poll results on this slide.

QUESTIONS? COMMENTS? CONCERNS?



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Audience Q&A Session

ⓘ Start presenting to display the audience questions on this slide.