



# Communication Tips for Better Customer Service

**E-MAIL**

**PHONE**

**OUT-OF-OFFICE MESSAGES**

**INSTANT MESSAGING**

**AUDIO/VIDEO**

**TELECOMMUTING**





## Notes

# TELECOMMUTING

### General information

A telecommuting employee and his/her supervisor must

- establish standards and expectations regarding work quality, quantity, and deadlines in an attachment to the telecommuting agreement;
- create a plan to monitor performance and measure productivity and results;
- establish a schedule to meet and review work, progress, and performance while telecommuting; and
- enhance two-way communication efforts to help ensure both parties understand expectations, issues, concerns, and work products and successes.

### Tips for a successful telecommuting experience

*For telecommuters:*

- Create a dedicated office space at home.
- Use the technology (Lync, video, etc.) to help share information, maintain client relationships, and increase your efficiency.
- Limit distractions and be mindful of background noise, especially during conference calls and video chats.
- Plan ahead to ensure you have all essential tools, documents, notes, files, etc. available during your telecommuting days
- Don't mark your telecommuting days as Out-of-Office or Busy on your Outlook calendar—this prevents colleagues from seeing your availability for meetings.

*For colleagues of telecommuters:*

- Ensure there is always a conference number available for meetings (or meet via Lync).
- Don't hesitate to contact colleagues who are telecommuting; don't treat them as though they are off or unavailable for meetings, discussions, etc. simply because they are working in a different location.

## Invite other people to conversation

- In the conversation window, click the People Options drop-down menu.
- Click Invite by Name or Phone Number, click the contact you want or use the search box to find that person, and then click OK.

## Add video

If you have a webcam set up, you can choose to allow your contact to see you during your conversation. To add video to your IM conversation or audio call, click Video in the conversation window. If you accept someone's incoming video call, they won't see you until you add video from your side of the conversation.

## Overview

As our divisions work to establish Legendary Service through continuous improvement, this guide is intended to support better communication with our customers and division colleagues. The following sections provide tips and best practices for the tools we use most—e-mail, phone, instant messaging, and video conferencing.

### Remember to always

- return calls and e-mails promptly, even if it's just to say that you don't have the answer yet and are working on it; let the customer know when you will be able to update them again;
- actively listen and understand the person you're communicating with, and focus on what they need;
- be concise and clear;
- pay attention to tone, grammar, spelling, and punctuation; and
- provide out-of-office messages with alternative contacts when you are not available.

### Rate My Service

The Legendary Service Project Team has created a "Rate My Service" clickable icon that some sections have chosen to add to their e-mail signatures. The icon links to a survey that is aimed at providing a convenient way for customers to share timely feedback on good service or suggestions on areas of improvement. Contact Annita Cox at 452-3890 for more information.

## Notes

# AUDIO/VIDEO

In addition to IM, Lync also has audio- and videoconferencing features.

### **Set up a Lync audio- or videoconference**

On your Outlook calendar menu, click New Online Meeting to schedule a Lync meeting. To add Lync to an existing meeting, open the calendar entry, click Online Meeting and then Send. This will send an update with the Lync meeting details to your invitees.

### **Add audio to an IM conversation**

In an existing IM conversation on Lync, just click the Call button. You can continue to type while talking.

### **Make a voice call with Lync**

- Point to the contact in your Contacts list.
- Click the Call button. (Or click the arrow next to it, and then select Lync Call from the menu.)

### **Answer a Lync call**

When a call alert appears on your screen, do one of the following:

- To answer the call, click the alert.
- To send the call to voice mail, click Decline.
- To redirect the call to a different number, click Redirect, and then select a number.

### **Start an audioconference**

- Select multiple contacts in your Contacts list by pressing and holding the Ctrl key while clicking the contacts.
- Right-click one of the selected contacts, and click Start a Conference Call.

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### General information

- Keep it short—ideally address only one topic per message.
- Use CC and BCC correctly; and before adding a recipient, ask yourself if the person really needs to get this message.
- Limit use of color, images, and backgrounds.

### Effective e-mail subject lines

- Be clear and provide some context, but keep it brief.
- Avoid one-word subject lines like “Question” or “Important!” and don’t leave the subject line blank.
- Use a subject line prefix to help the recipient prioritize your e-mail at a glance. Commonly used subject line prefixes include the following:
  - Action required by 8/5:
  - Approval needed by 8/5:
  - For review:
  - FYI only:
  - URGENT:
- If you can communicate your message in just a few words, you can use the subject line for the whole message. Type all the relevant information in the subject line, followed by <eom> for “end of message.” This lets the recipient know that they don’t have to open the e-mail.
- If your reply changes the subject of a conversation, modify the subject line or start a new e-mail conversation.

### Outlook








For guides and tips on using Outlook, see the A-Z Listing on ItB under Outlook > Resources.

## Notes

# INSTANT MESSAGING

### Availability

Check a colleague's availability in Lync before initiating an instant message (IM) conversation:

	Available	You are online and available for contact.
	Busy	You are in a Lync meeting or, according to your Outlook calendar, you have an appointment.
	Do not disturb	You don't want to be disturbed and will see conversation alerts only from your Workgroup contacts.
	Be right back	You are away briefly and will return shortly.
	Away	Your computer has been idle (for 15 minutes, by default).
	Off Work	You are not working and are not available to contact.
	Offline	You are not signed in.

To set your own availability, use the drop-down menu below your name in Lync. You also can add details about your location/availability in the "Set Your Location" or "What's happening today?" fields.

### Etiquette

- When initiating an IM conversation, first ask if your contact has time to chat.
- Wait for a response to your first message; avoid sending multiple messages before you receive a response.
- Ask before moving an IM conversation to an audio- or video-conference.
- Don't invite someone to join a multi-party IM conversation in progress without asking everyone in the session first.
- Avoid too many goodbyes when ending a conversation.

# OUT-OF-OFFICE MESSAGES

## E-mail

Follow these steps to enable your out-of-office reply in Outlook:

- Click File and then click Automatic Replies.
- Click the radio button next to “Send automatic replies” and check the box next to “Only send during this time range.”
- Enter the date you will be out of the office and the date you will return.
- Type your out-of-office message in the text area.
  - Remember to provide a contact for immediate assistance in your absence.
  - **Be sure to include your dates in the message text (Outlook does not automatically do this).**
- Click OK at the bottom of the dialog box.

# PHONE

## Voice mail greeting

- Record a professional greeting that includes your name and organizational function/section.
- Speak slowly.
- Tell callers what to include in their message.
- Provide an alternative phone number or contact for urgent matters.

Example: *“You have reached Wendy Myers in the Management Division. I am currently away from my desk. Please leave a message with your name, number, and request, and I will return your call as soon as possible. If this is an urgent matter, call my mobile at 202-555-1212 or contact Bill Johnson at 202-555-1111. Thank you.”*

## Leaving voice mails

- Speak slowly.
- State your name, organization, and phone number.
- Include some details, but be brief.
- Repeat your name and number at the end of the message.  
Example: *“Hi, Jon. This is Wendy Myers with the Management Division at 202-555-1212. I’m calling to let you know that we have received your request and will have a response for you by Friday. If you have questions in the meantime, please feel free to call me. Again, it’s Wendy Myers at 202-555-1212.”*

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## Accessing your mailbox

- From your office extension
  - Press the Messages key.
  - Enter your password followed by the pound key (#).
- From an outside phone
  - Option 1: Dial 202-736-5699.
    - Press the pound key (#).
    - Enter your mailbox number.
    - Enter your password, followed by the pound key (#).
  - Option 2: Dial your office number.
    - When your message begins to play press the star key twice (\*\*).
    - Enter your password after the prompt.

## Notify Me

Notify Me sends a message to your Board e-mail when a voice mail message is left on your office phone. To request this feature, e-mail Board.Helpdesk@frb.gov or call 728-5808. To enable or disable Notify Me, press 4-2-4 from the main voice mail menu and follow the prompts to turn Notify Me on or off, and select Notify Me features.

## General information

Whenever you will be out of the office for an extended period of time, be sure to leave helpful out-of-office messages on your voice mail and e-mail. Include the following information:

- your exact date(s) of absence
- at least one immediate contact including name, title, phone number, and e-mail address (you may also want to include additional contacts for specific issues)
- if you plan to check messages, indicate how often (daily, periodically, etc.).

Example: *"Thank you for your message. I will be out of the office beginning July 3 and returning July 10. For immediate assistance, please contact Bill Johnson, assistant director, at 202-555-1111 or bill.johnson@frb.gov. For specific issues regarding the annual conference, please contact Barbara Miller, special events manager, at 202-555-3000."*

## Voice mail

Follow these steps to record an out-of-office greeting:

- Select option 4 (personal configuration) from the main menu.
- Select option 1 (to record greeting).
- Select option 2 (to record/re-record extended absence greeting).
- When recording your greeting, remember to give the name and contact details of a coworker who can provide assistance in your absence.
- Press the # key to stop recording.
- The recording will be replayed for you. To accept the greeting and make it active, press 1. To re-record the message, press 2 and repeat steps 5 and 6.

Remember to turn off your out-of-office greeting when you return. If you have questions about voice mail, consult the Voice Mail Guide (find it in the A-Z Listing on ItB under Telephones) or contact Telecommunications at 452-4357.

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