Customer "On-Hold" Techniques

✔ Thank them for explaining the issue.

✔ Let them know that in order to best address/evaluate the situation, you'd like to take a few minutes to do so (test, inspect, look at code).

✔ Ask them if it is ok for you to put them on a hold while you do that.

✔ Let them know that you will be back in a few moments with an update.

✔ Come back with your update and next steps:

"Hi Joe, thank you for holding on the line!
I took a few minutes to inspect over here, and it seems I'll only need another moment to help you fix this/ implement the necessary changes. Do you mind holding briefly? I'll be back in just a moment."

or

"Thanks so much for holding on the line, Joe. have an update for you.
*I was able to identify what needs to be changed here. This particular tweak will likely take more than one or two minutes, so **I'd like to give you the option of a call back** (from me).*
If you would rather stay on hold while I work, that's absolutely okay. If you'd like for me to call you when I am done, I'll be happy to do that.
I just want to be sure we don't rush through this/ this is addressed completely."

or

"Joe, thanks so much for holding on the line while I took a look at that. Here's what I have found...
The error lies within a block of code on this landing page. That code makes up the image slider you see, and it appears to have been created by a developer, or someone on your team who is familiar with creating and designing with code.
***Let me go through the details with you of how I'll be able to help you get this resolved**..."*

"

Quick Tips

✔ Introduce the hold
    Provide a reason/Ask permission

✔ Occasional breaks/check-ins if longer than 2-3 mins

✔ Use their name when coming back from hold.

✔ Thank them for holding.

Staging

The last scenario utilizes what we call **Staging**.

Staging helps us deliver "bad news," or in this customer example, helps us let the customer know that will not be able to work with the custom code on their site. Instead, we are going to go over how we can help them identify where to find the solution they need.

What is Staging?

✔ <u>Introduce what you are going to say before you say it</u> – for example, tell them what you are about to discuss, acknowledge the customer's agenda, or explain that you want to go over options with them.

✔ <u>Explain the reason for what you are saying as you are saying it.</u> Most of us say as little as possible on an uncomfortable topic because we instinctively move away from the pain. When we move toward the pain with more details, customers calm down.

✔ <u>Empathize with the customer's feelings after you have said it.</u> No matter what a customer says, their feelings are never wrong for them, and you can always acknowledge how they see the situation

Done well, it is a very powerful tool that lowers the hostility of a customer's reaction and facilitates working effectively with him or her to try and find the best solution to their problem.

In the example given, you are unable to help Joe directly because the code that is presenting an issue, is custom.

> *"Joe, thanks so much for holding on the line while I took a look at that. Here's what I have found...*
>
> *The error lies within a block of code on this landing page. That code makes up the image slider you see, and it appears to have been created by a developer, or someone on your team who is familiar with creating and designing with code.*
> ***Let me go through the details with you of how I'll be able to help you get this resolved***.
>
> *The first step in a situation like this is to identify the cause. We've done that today on our call...*
> *The next step will be to work with the code to resolve. This is going to involve a development/design resource (dev or designer) - either someone on your team who is comfortable with code/who build the custom slider - or a partner.*
>
> ***I understand that it is important that this gets fixed as soon as possible.*** *I'm outlining these steps for you because our support team is trained on supporting and troubleshooting the HubSpot software itself, and are unable to fully support unfamiliar/custom design/code that is added to pages on the CMS."*