



# THE LAMPPOST

*Lighting the way in Finances and Life*

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## AVOIDING THE CUSTOMER SERVICE BLUES

"Your call is important to us." This is the classic catch phrase corporations pitch when they don't want to use a live person to welcome your call. Then you go through the number-punching game of wading through layers of filters of computer voices to reach the customer service department.



It's usually followed by a sentence you wish weren't true: "Your call will be answered within 27 minutes." Getting through the corporate electronic muck is enough to make your blood boil. But, getting to the person at the end of the line is the goal. Here are ten tips to

help you get what you want when dealing with a real customer service person:

### *Before you call:*

**One: Make sure you have a decent speakerphone or headset.** If you can move around while you're waiting, then you can do productive tasks, like folding the laundry, paying the bills, or reading your e-mail. Do something while you're waiting so you will not feel like you're wasting your time.

**Two: Set aside at least a half hour to confront the problem.** Not setting aside enough time will frustrate you. Be realistic in setting aside enough time to fight through your problem. Don't call shortly before you have to do something important.



**Three: Have a pen and paper handy.** Do this before you pick up the phone and take copious notes while you talk.

**Four: Get a human.** When you want to reach a person instead of hearing an automated account balance, a visit to [www.GetHuman.com](http://www.GetHuman.com) is in order. This site publishes tips for weeding through phone systems and getting an operator on the line quickly.

**Five: Gather your evidence.** This is the most important pre-call tip. Nothing makes customer service calls go more smoothly than specifics – especially when dealing with under-paid, over-stressed customer service representatives.

### *When you get a real person on the line:*



**Six: Act like a human.** Yelling at a customer service representative who is hearing your issue for the first time is like using an atom bomb to kill a mouse. Remember, a kind and respectful voice gets a considerate and professional response.

**Seven: Document your call.** Write down the time and date. Then, ask for the operator's name and number to call back if you are disconnected. You really want a record of whom you talked to for the inevitable second conversation when you'll need a reference point. Many times when customer service reps don't follow through on their part, you can call back and reference the previous conversation. Supervisors check their phone records and see that you did speak to someone who was supposed to take care of your problem.



**Eight: Say exactly what you want,** as soon and as briefly as possible. Example: "I see a \$36 fee on my phone bill. I was never told about this fee. I want a refund."

**Nine: If at first you don't succeed, hang up and try another operator.** This doesn't work as well as it used to, because sophisticated databases track customer calls now in detail. Representatives enter notes about their calls, so you are likely to hear, "I see you just called in a minute ago." But, sometimes the second person you get will be experienced enough to help you get what you need.

**Ten: If a second operator won't help you, ask for a supervisor.** Many times customer service reps don't have the authority to overturn charges, they can only "toe the line". If you have a legitimate claim, and you have spoken clearly and calmly to the voice at the other end of the phone, you should be able to have a supervisor or manager overturn your charges.

A good rule of thumb for all this is the Golden Rule: treat others how you want to be treated. Maintain a cool attitude, speak the truth, have solid supporting evidence, and most of your customer service calls should go smoothly.

# Yo ... Lessons from Rocky

About a year ago, I decided to attend a business planning convention for mortgage professionals in Las Vegas. I thought Eloise might enjoy a few days away from the kids, so I invited her to come with me. Any one who has ever tried to leave their children in the care of some poor, unsuspecting soul knows the Herculean efforts necessary to leave town. Collapsing into our seats on the plane, we jetted off to Mandalay Bay, looking forward to some quiet in 'Vegas (the irony of this last sentence is not lost on the author).

Each day, I went off to my daily meetings, and Eloise, not being much into gambling, found herself wandering around the opulent hotel, looking for something to do. Down a quiet hallway, she came across a table sporting a sign, "Be in A Movie." With nothing better to do, she signed up to be an extra in the arena fight scene for the upcoming film, *Rocky Balboa*. That night, at dinner, we joked about the aging Rocky, but agreed that it would be fun to see the spectacle. The



Eloise and Frank Stallone

next morning, Eloise showed up on the movie set, and through a very non-typical course of events, was whisked to the front of the crowd and placed ring-side for a 10 hour day of filming.

She met some *very* interesting people from Hollywood, got up close and personal with Frank Stallone, Sylvester's brother, and above all, learned to appreciate her life as an ordinary, Minnesota housewife!

When the movie, *Rocky Balboa* hit the theaters this past December, we decided to go as a family to see if Mom made the final cut. We were rewarded with a blink-of-an-eye, yet very clear, clip of Eloise cheering in the ending fight scene. The movie was surprisingly good (not just because my wife is in it!), and I highly recommend it.

Reflecting a little bit of the original *Rocky* movie (which won three Academy Awards) it was very touching and thought provoking. Our trip to *Rocky Balboa* inspired our family to have our own "Rocky Marathon" over the Christmas break, as most of our children had not seen the previous films. It was great family time, watching Rocky overcome the odds, again and again and again....

Though it's humorous to think about the repetitive *Rocky* storylines, I was struck by an undeniable message. *If you do not have the right perspective on yourself and your challenge, you won't overcome it.* In the first film, Rocky started out as the underdog, a local circuit boxer who moonlighted as a collection thug for a loan shark. When miraculously given a chance



Sylvester Stallone on the set

to fight the heavyweight champion of the world, he accepted the challenge, hired Mickey, trained harder than he had ever trained before, and learned that he could do more than he ever imagined. In the subsequent films, he got into trouble whenever he started thinking too much or too little of himself. In every film, the turning point always came when Rocky accepted the challenge put before him, got some help, put in the hard work...you know the rest.

Many of us go through a day-to-day routine without challenging ourselves to be our best. We may have a goal and give it an attempt, but don't put in a Rocky-like effort to reach our dreams. Odds are, we are never going to get an opportunity to box with a prize fighter, but we can strive to be the best dad, mom, computer programmer, volunteer driver, electrician ...

So, where do you start? Begin by acknowledging your strengths and weaknesses and setting a goal for your life where you want to excel. A great book to read is *All Buts Stink – How to Live Your Best Life and Eliminate Excuses* by Walter Bond. The beginning of success is to acknowledge that you probably don't have all the expertise to get there on your own. Athletes become successful when they utilize coaches who push and train them. Although you most likely don't need to hire a coach, you can enlist a friend, co-worker, or spouse to help you to set goals and to encourage you.

It's time to get out that dusty *Rocky* soundtrack (or for you modern folk, download it from iTunes) - play it loud and proud. Set a goal, find a "Mickey" and push yourself to be the best.



May 2007 be your greatest!