

# Helpline Hints

**C**reative use of a voice helpline can make or break any smaller technical venture. I guess I have been doing this for a long, long time. So, I thought I'd share a few of the things I picked up along the way that seem to work fairly well for me...

## Know your goals

Be sure you know *why* you are running a helpline. Is it to take orders? To provide assistance to existing customers? To network with others in the field? To find new ideas and concepts? To sell consulting work? To get rentable names for a mailing list? To just have someone to talk to?

Write these goals down somewhere. Prioritize them. And *stick to them!* Always shorten or eliminate outright any of the calls that do not meet your goals.

## Have key info on hand

Try to have the answers for 90 percent of the probable questions within easy reach. Nothing blows a caller's mind quicker than *instantly* informing them that Griffins and Gargoyles are offered by *Design Toscano*, steam calliopes from *Rough & Tumble Engineers* or *Ragtime*, and synthetic kale from *Garden Fresh Replicas*.

Actually, I sure do sleep better at night knowing there are individuals out there who have dedicated their lives to perfecting synthetic kale.

In my own setup, I've got a pile of order blanks which double as catalog requests. An overflowing black notebook with the *Synergetics* master names and numbers list and all of my collected resource sidebars. That has all of the more common numbers highlighted and color coded. A single sheet list and "red" clip board for the hottest of the hot. Plus that EITD, short for *Electronic Industry Telephone Directory*. And my catalog and *Guru's Lair* site map.

Nearby are such references as the *Ulrich's Periodicals Dictionary*, *EEM Master*, *ECG* and *NTE* part x-refs, my *Synergetics Consultants Net* referral book, and copies of my own books and columns.

Plus, of course, extra pens and notebooks.

I do keep meaning to work up some virtual reality fuzzy logic Hypertext expert system multimedia supertechnology solution. Meanwhile, the notebook gets fatter.

If you can't give an exact answer, try for a generic one. Or try to send them somewhere closer to their goal. Your obvious choices are trade journals ("try *Powder and Bulk Solids*"), editors of technical magazines, special interest bookstores, or the *Dialog Information Service*.

## Set strict time limits

I get as many as 80 calls a day. You could get lots more. So it really pays to *promptly terminate any call that is not heading where you want it to go*. Keep a stopwatch or an egg timer near the phone.

If you do not know where the call is heading in twenty seconds, terminate it immediately. The quickest (and the most befuddling) way to do this is to tell them they've got the wrong number. If you don't like where the call is going after eighty seconds, end it quickly.

## Be a careful listener

Remember, it is their dime. So, let them do most of the talking. At least early on. Take notes and try to anticipate which reference page the answer is on. Aim for short and succinct answers.

Speak slowly and plainly, especially when you give out names and numbers. Always suppress your ego. Do not express opinions beyond those clearly asked for.

## Try to answer the "real" question

Your help is often being sought because the caller has incomplete information. More often than not, the question itself displays an appalling lack of knowledge. So, besides answering the specific question, try and figure out what the question *that should have been asked* really is.

Then suggest solutions along those lines.

If possible, give more than a specific answer. Instead, provide resources or tools where they can go for *methods of answering* future questions by themselves.

But, do not be at all surprised should your caller reject broader or more correct solutions. Few people are willing to rapidly admit they are dead wrong. In these cases, all you can do is make them aware of alternates.

While planting seeds of doubt along the way.

## "4073"

Always answer your phone promptly in a professional and courteous manner. Always make your first response appear like a legitimate commercial venture. Or at least create the illusion of one. This could get tricky in a house with teenagers or smaller children in it. But even a sixth grader can sound good with some coaching.

A slurred "yeah" won't hack it.

Use *overstated formal politeness* until you know what the call is all about. Identify yourself promptly.

Because *Synergetics* is a group of different ventures, I prefer to answer by using the last four digits of my phone number. Others might elect to answer with a business or organization name. Answering by digits does tend to get rid of unwanted callers in a big hurry.

Prevent any distracting background noises. Especially pets, small children, wierd machines, or rock music. I use a whistle silencer to kill the stereo. But never did find any SPCA approved cure for a large orange tomcat who found he gets attention by meowing loudly into the phone.

I have found it useful to "unlist" my phone number by substituting an unusual name variation in the directory. A name that instantly tells you a Bozo is involved. Whenever it gets asked for by a telemarketer or charity.

### How are you today?

Never, *never*, *never* answer this question! Respond *only* with *total* silence. Dead air time. This is your ultimate Bozo filter. The reason is simple: *Whoever speaks next – loses!* Reasonable callers will continue without missing a beat. Bozos and potential ripoffs will lose their place in the script they are reading and stumble badly.

The amazing thing is that this technique works *all* of the time. I have never seen it fail. Ever.

### Where are you calling from?

Asking this key question immediately alerts you to such things as state sales tax liability or a local delivery. It is also a subtle way of reasserting control of the call.

After decades of grief, we no longer accept any foreign orders. At least for me, they have not been even remotely worth the hassles and bad vibes. I see it kinda like pizza delivery. Go too far, and the pizza gets cold and you get into arguments over the anchovies. Not to mention short changing your closer customers.

Put your energy where it will do the most good.

### Tailor response to region.

Like it or not, all of those politically incorrect regional stereotypes are pretty much accurate. At least most of the time. Any Utah caller is likely to be deeply religious and easily offended by any off-color comment. Excess levity does not play well in Maine. Things are *not* up to date in Kansas City. Mensa candidates are scarce in the deep south. It rains in Seattle. Southern Cal is, uh, Southern Cal.

New York and New Jersey callers do tend to get highly argumentative and sometimes outright hostile. The lion's share of your complaints and warranty problems will come from a six block area in south Florida where all of these wonderful folks go to retire.

I invite you to verify these stereotypes for yourself. But the key point is this: *Should you go up against the regional stereotypes, you do so at your own peril.* Until you are sure of your caller, adjust what you say and how you say it to suit the place the call is coming from.

At the very least, be more formal on the East Coast and more laid back on the West.

### Approach bells & whistles with care

Many of the new telephone accessories and services are highly overrated and not in the least cost effective. The rule is to have a long talk with someone actually using

these before you even *think* about trying them.

An answering machine makes no sense whatsoever for a no-charge helpline. For other ventures, these can be useful and handy. Besides being after-hours Bozo filters.

I personally despise FAX. PostScript is faster, cheaper, and gives ridiculously higher output quality. Especially in the new *Acrobat* format with its newly free readers. FAX on demand does offer a quick way of delivering grubby and illegible catalog sheets to your customers. For best use, it will need a separate phone line.

800 numbers are fine for taking orders, but can be very costly time wasters otherwise. I know several craft houses who have sharply scaled back on their use. Simply because these are not cost effective.

Similarly, 900 numbers can also be a bad scene. Firstoff, because they are outrageously expensive. At least around here, the first *two hours* of calls each day only subsidizes the phone company. There is also a sleaze image to 900 numbers. You are likely to grossly overestimate how many for-pay calls you'll ever get.

*Call interrupting* (obscenely misnamed *call waiting*) is a gross and demeaning insult to your customers. Don't ever subscribe to it! And "accidentally" hang up on any epsilon minus who has the arrogant hubris to abuse it.

I have never met any voice mail system that wasn't a permanent source of bad vibes. These simply *do not work*. Avoid them at all costs. Or use them to your advantage by surprising everyone with a real person answering your phone in a prompt, competent, and courteous manner.

On the other hand, caller ID is just plain wonderful. Especially when you pull up customer records before you answer the call. Even handier is finding out who tried to call you when you were out to lunch.

One interesting source of telephone bells and whistles is *Hello Direct*.

### Ask for the sale

Don't be afraid to nudge the caller into buying. So long as you really feel that your product genuinely meets their needs. Closing the sale always has been a touchy area for me. Something I need more practice on.

Give them only one or two order possibilities, instead of overloading them with product choices. Keep it simple.

### Dealing with problem callers

Sometimes a call might be heading into territory you simply don't care for. Maybe you cannot help them. Or they are just lonely and incessant jabberers. Or they clearly have psychological problems. Or are irrationally irate. Or you have repeated yourself several times over and they still don't get the message. Or it gets obvious after several calls that they are never, ever going to buy anything. Or moral or legal issues arise you find unacceptable.

Needless to say, you want to be reasonable and polite with actual and potential customers. For these folks, you should *always* go out of your way to be courteous.

Suppress your ego and stay objective. Keep your cool. Or don't try running a helpline in the first place.

But it is equally valid to *carefully* spend limited time and energy making sure that *undesirable* non-customers stay that way. The trick here is to use the *gentlest* possible tool to get them quickly and permanently off line.

## SOME MENTIONED RESOURCES

**Adobe Acrobat**  
1585 Charleston Road  
Mountain View CA 94039  
(800) 833-6687

**Design Toscano**  
17 East Campbell Street  
Arlington Heights IL 60005  
(800) 525-0733

**ECG/Phillips**  
PO Box 3277  
Williamsport PA 17701  
(717) 323-4691

**EEM Master**  
645 Stewart Ave  
Garden City NY 11530  
(516) 227-1300

**EITD**  
2057-2 Aurora Rd  
Twinsburg OH 44087  
(216) 425-9000

**Garden Fresh Replicas**  
PO Box 208  
Neosho MO 64850  
(800) 545-7304

**Hello Direct**  
140 Great Oaks Blvd  
San Jose CA 95119  
(800) HI-HELLO

**NTE Electronics**  
44 Farrand Street  
Bloomfield NJ 07003  
(201) 748-5089

**Power & Bulk Solids**  
PO Box 640  
Morris Plains NJ 07950  
(201) 292-5100

**Ragtime**  
4218 Jessup #AB  
Ceres CA 95307  
(209) 668-0366

**Rough & Tumble Engs**  
Box 9  
Kinzers PA 17535  
(717) 442-4249

**Synergetics**  
Box 809  
Thatcher AZ 85552  
(602) 428-4073

### Problem caller techniques

One tool is *third partying*, where you minimally refer them to someone else and exit stage left. A second is to purposely appear incompetent or unrewarding.

A third is a gentle hint, like "I'll have to cut you short. We're getting a lot of calls this morning." Sometimes, a simple "Sorry, I can't help you" will do. Or "That's all the info I have on that topic." If those do not work out, try repeating yourself. Slower, louder, and lower in pitch. If that doesn't hack it, slowly and loudly tell them you are sorry about their hearing problem.

Sales people can often be dealt with by a "The info was for reference purposes. Thank you for sending it and please keep our name on your mailing list." If they persist, tell them your work is classified, confidential, or "under NDA", and that you cannot comment on it. Or that you do not discuss work in progress. Or that you passed the info on to "appropriate parties" who will phone on need.

As a volunteer fireman, I can always trip my pager and scream "I'VE GOT A FIRE!" And walk away. I have also got this magic machine that sounds exactly like a ringing telephone. But note that hanging up doesn't work, since they'll only call back. The trick is to make them *just* mad enough to go away. And stay there.

### Learn from your callers

Repeated questions can be complaints in disguise. Or can point out shortcomings in your catalogs or ads.

Do keep a notebook or a log of anything interesting that gets asked or commented on. Do pay particular attention to repeats. Then improve upon the improvable.

But note that some things simply cannot be fixed. My *Hardware Hacker* column always has a large and obvious sidebar in it plainly labeled *Names & Numbers*. I try to lead and end with "Don't miss the Names & Numbers". Yet I

still get dozens to *hundreds* of calls a month from readers who could not find a pig in a dishpan. They will insist on arguing for ten minutes before the sheepish "Oh!" finally arrives. A total waste, all around.

Maybe a contest with white canes and seeing eye dogs instead of *tinaja quests*. Oh well...

### Leave them wanting more

Otherwise known as *shut up after the sale*. Nuff said on this important rule.

### Consider on-line alternatives

You will definitely want a prominent on-line address. Your own website is an even better idea. I find more and more orders and more and more useful contacts coming in by way of networked cyberspace.

### For More Help

The resource sidebar gathers up some of our mentioned names and numbers. Much more on related topics in my *Incredible Secret Money Machine II* book and in my *Blatant Opportunist* collected reprints. ♦

*Microcomputer pioneer and guru Don Lancaster is the author of 35 books and countless articles. Don maintains a US technical helpline you'll find at (520) 428-4073, besides offering all his own books, reprints and consulting services.*

*Don has catalogs at [www.tinaja.com/synlib01.html](http://www.tinaja.com/synlib01.html) and at [www.tinaja.com/barg01.html](http://www.tinaja.com/barg01.html)*

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