



Lesson Five Pre-work

We hope you're thinking about and applying what you learned about PROVIDING CLARIFICATION AND ASSURANCE. And we hope you've gained new insight about how much influence you can have if you make the effort to understand the perception and attitude that drives an individual's behavior.

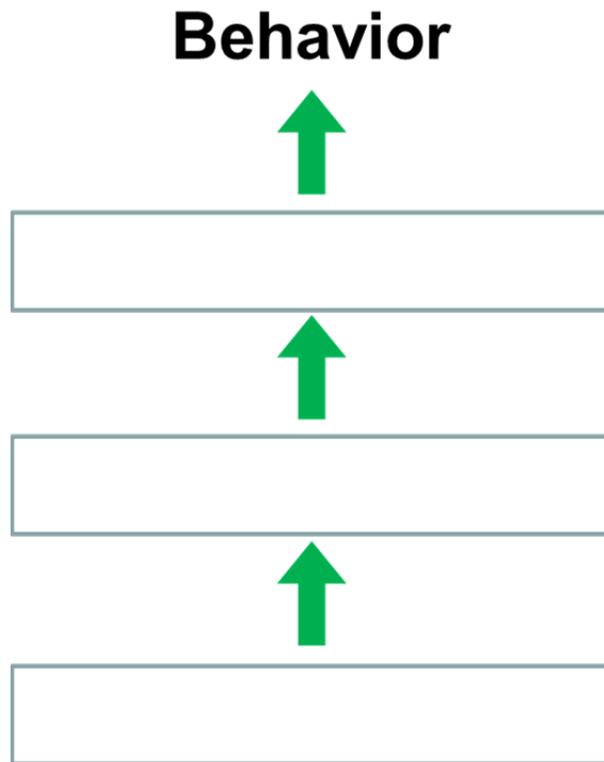
To help ensure that the next topic – **CLOSING THE CALL** – is as successful and valuable as possible please print this document and...

- Before the session read pages 2-3 and highlight the important points
- During the session use pages 2-6 to follow along and to take notes
- **After the session, read page 7, Closing the Call Follow Through, and apply the guidelines in your post-session activities**

See you online!

Your Acclivus R3 Team

The Acclivus Influence Model



Because the foundation for perception is awareness, creating or completing awareness may be essential to influencing perception

Closing the Call

The close of a service call influences both the customer's perception of the value we have provided and the customer's attitude for the future.

We begin the close of each call with a summary of what has been accomplished. It is the customer's perception of the value we have provided that strengthens—or fails to strengthen—the service relationship; it is also the customer's perception of the value we have provided that ensures—or fails to ensure—ongoing, profitable revenue. Our summary of the call must always convey the value we have provided.

The value we convey in our summary should include that value related to accomplishing the agreed-upon purpose for the call—determining the root cause of a problem, identifying what was needed to solve the problem, and then solving it.

The value we convey in our summary should also include that added value related to the process we followed. It is valuable to the customer to know what is not causing a problem. It is valuable to the customer to know what could become a problem and what is needed to prevent a problem. It is also valuable to the customer to know how to achieve optimal results through the utilization of product, service, program, and system capabilities.

When closing each call, the added value we have provided through include advising, coaching, and consulting should always be included in our summary. It is these facets of the service professional's emerging role and responsibility that differentiate us as the solution for our customers.

Here is the proven process for Closing the Call:

1. Summarize call
2. Listen/Probe for agreement
3. Propose action
4. Listen/Probe for commitment

Closing the Call

– Webinar notes –

1. Summarize call
2. Listen/Probe for agreement
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To reinforce the spirit of working with,
actions to be taken following the call
should be shared by you and the customer.

Closing the Call

– Video notes –

1. Summarize call
2. Listen/Probe for agreement
3. Propose action
4. Listen/Probe for commitment

The actions proposed in the close of the call should always be targeted to achieving optimal results, building a strong relationship, and ensuring profitable revenue.

Following Through

– Webinar notes –

The close of each service call, in fact every service interaction, sets the tone, direction, and focus for the future service relationship with that customer.

Lesson Five Follow Through

Congratulations on completing the fifth session of R3 Service. As we have reminded you each lesson, the most important aspects of learning a new skill cannot fully occur until you consciously apply that new skill in a real-world setting in which your successful performance is very important. And for us in service, it is also an essential part of the learning process to assess our own performance and the effects it has on the situation and the customer relationship.

Focus on the Closing of each service call and customer interaction. If you cannot meet with your customer contact immediately, find a way to re-connect as soon as possible. Closing is too important to omit just because it's inconvenient.

When you summarize the service, try to convey the value of what has been accomplished, and underscore any value that the customer contributed through his or her involvement. Try to identify follow-up actions that can be shared by you and the customer.

During this lesson:

- Review the text and your notes on pages 2-6 of this document.
- Select multiple service calls – preferably one per day – to assess in terms of your R3 Service skills, and especially your application of the R3 Service principles and skills of CLOSING THE CALL. Ask yourself:
 1. How well did I apply the principles and process of CLOSING THE CALL?
 2. What went particularly well during the interaction?
 3. What would I change about how I applied this process?
 4. What did I learn about influence?
- Notice the effect that CLOSING THE CALL has on the customer's perception of value and on the service relationship. And notice the effect that the close, or conclusion, has on every meeting and discussion in your personal as well as professional life.