

Inbound Telephone Staff and Response Path for Certification Programs

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With expanding technology and AI features, it's possible today to "hire" a sophisticated, voice-activated telephone answering system for less than a live receptionist. RingCentral, for example, even offers AI-based phone agents 24 hours a day, 7 days a week. (www.ringcentral.com.) These automated systems can make your company look bigger and more established than it actually is (and they're ideal if you work with a remote team).

But eventually, your certification prospects (leads) will still want to speak to a real human—regardless of the price of your program. Not only that, but *old-fashioned phone calls* are actually becoming more popular, now that Zoom video calls—though mainstream—require people to be in front a computer for the best experience.

So, what can you do?

Inbound Technology That Works for Certification Programs

In our experience, if you are a solo entrepreneur or employ only remote staff, here's a response path that works well for certification programs:

1. Online sales letter or webinar sells your program



2. Call-to-Action (CTA) asks prospects to complete brief questionnaire, provide name/email/mobile phone, and we'll contact you to discuss the program.



3. Very short form embedded in sales letter provides fields for name, email and mobile number. Clicking "Submit" on this short form takes prospect to the questionnaire (5-12 questions).



4. Completing questionnaire and clicking "Submit" sends prospect's contact information and questionnaire answers to your CRM, which triggers confirmation email and text (SMS).



5. Completing questionnaire and clicking "Submit" also sends the prospect to Calendly (or other online scheduler) to book a discovery call with you. Telephone calls (not Zoom) are recommended to discuss your program, since many people will not be in front of a screen at the time of scheduled call and are more likely to be a no-show.

Abandoned Questionnaires: If a prospect completes the short form embedded in your online sales letter, but does not complete the longer questionnaire or book a discovery call, you should pre-program into your CRM an email drip sequence that is triggered to nurture the prospect and reinterest them in booking a call with you.

No-Shows for Discovery Call: Similarly, if a prospect does not answer your telephone call at the appointed time, you should pre-program into your CRM an email drip sequence that you can manually trigger to nurture the prospect and reinterest them in booking a call with you. Many people are embarrassed when they miss a call and will not readily reschedule. However, a friendly email sequence will not only convince them of the benefits of speaking with you, but will also communicate your genuine interest in learning more about them.

Pre-screening by an assistant: If you have the ability to hire a virtual assistant to pre-screen calls and gather the information in the questionnaire, this is an excellent “high-touch” beginning to the prospect’s experience with you. The screener can pre-qualify prospects based on your criteria, or simply book a discovery call for everyone who responds.

Of course, if you do have staff onsite at your business to answer the phone, so much the better—as long as they are trained to begin the “sales” process and help convert inquiries to sales. Since your receptionist or phone-answering staff truly is your first point of contact, they become—by default—your first opportunity to generate cash-flow.

That’s why you must approach this job position with making money in mind.

Finding Good Inbound Telephone Staff

In any well-run small business, superior telephone answering staff just seem to know everything that’s going on—from current promotions...to who does what job...to up-to-the-minute information on products and services...and more.

There’s no worse experience for a customer or prospect than to reach your receptionist, only to find out the customer knows more about your products, services or promotions than the person answering the phone.

For this reason, hiring superb telephone answering staff—then training them properly—is crucial. But instead of running an ad that looks like every other Receptionist ad, write it in such a way that top candidates will be excited to come to work for *you* versus other advertisers. Better yet, run a small ad with one or two enticing phrases, then direct jobseekers to a voice mail recording or video at your website that better explains the job, your company and why it’s such a pleasure to work there. By using this technique, you’ll get top candidates willing to work for the pay you’re offering—regardless of whether they might be able to make more money elsewhere. Additionally, determine the non-monetary advantages of working at your business and use them to draw top candidates. For example, do you offer:

- Flex-time which appeals to students and working mothers?
- Rapid promotion into other jobs in the company or capabilities within your industry?
- A fun work environment or creative atmosphere?
- Unique training that candidates can’t get anywhere else?
- Exciting projects or the ability to interface with interesting people?
- More paid vacation time or personal time than other companies?
- A way for front-office employees to earn money above and beyond their normal pay (such as commissions for order-taking or save-the-sale calls)?

Interviewing Inbound Telephone Staff

After jobseekers contact you about the Receptionist position, you'll need to interview them—first by phone, then in person for final candidates (if hiring locally). But before planning your interviews, ask yourself, *What qualities do I think of when I encounter a really good telephone person?* Articulate, quick-thinking, personable and knowledgeable are some words that come to mind. When a job candidate answers your ad, these are the qualities you should look for immediately—in addition to any other work experience you're looking for.

One way to find out how articulate a candidate is...how well they use good grammar... whether or not they'll represent you well and so on, is to simply get them talking about *anything*—an item on their resume, their past work history or their hobbies. Also, ask open-ended questions directly related to the job such as, "What would you do if a caller wanted...?" to find out whether they will think quickly and go the extra mile to help a caller.

Planning Your Interview Questions

To plan for the interview process, write below the questions you want to ask. Then, add any questions that will help you determine the attitude, work ethic and service-mindedness of your future phone staff:

Work Experience _____

Specific Skills _____

Natural Sales Ability/Customer Service/Order Taking Experience _____

Availability/Hours/Days _____

Knowledge of Your Industry _____

Knowledge of Your Type of Product or Service _____

Attitude/Work Ethic _____

Hiring and Negotiating Pay

When you find a candidate who has the right personality, work ethic and skills you desire, you'll want to make them a job offer quickly. In some job markets, even a day's delay could mean your final candidate will be hired by someone else.

Additionally, you'll want to negotiate pay that makes sense for your market, but you might also negotiate additional incentive-based pay if your receptionist will be taking orders, upselling, performing customer service or doing "save-the-sale" calls.

A small sales commission or percentage of the sale is appropriate depending on your certification program and how much the receptionist actually contributes to the sale—as is a flat fee per item sold.

Defining Inbound Telephone Job Duties

There is more to a inbound telephone person's job than just answering the phone. Perhaps you need them to perform administrative functions, book your appointments, provide minor customer service duties and more. Take time now to decide what those job duties will be in addition to answering the phone:

Hours Needed: _____ am / _____ pm Days Needed: Su Mo Tu We Th Fr Sa

Administrative Duties (if any): _____

Customer Service (if any): _____

Personal Assistant Duties (if any): _____

Order-Taking / Sales / Save-the-Sale / Inquiry Conversion (if any): _____

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