Universal Design Toolkit for Customer Engagement

2 Face-to-Face, Telephone & Video Communication

2.1 **Introduction**

**Four reasons to use this Toolkit:**

1. This Toolkit will help you assess your face-to-face, telephone and video communication to ensure you are communicating in a way that is easy to understand.

2. This Toolkit will help you to better engage with your customers through face-to-face, telephone and video communication.

3. This Toolkit will help you to deliver a better customer experience.

4. This Toolkit will help you to develop new customer communications.

Universal Design aims to simplify life for everyone by making products, services and communications, more usable by as many people as possible.

The following guidance is particularly valuable for staff members who work at the 'front-end' of your business, engaging with customers in person (face-to-face), over the phone or, increasingly, through video communication. These staff are the face and voice of the business. All these forms of communication use a mix of verbal and non-verbal communication styles.

**Good customer experience makes good business sense...**

Two-thirds of customers are willing to spend an average of 13% more with a company they believe provides good customer service. 

This Toolkit provides practical guidance that you can apply in your business at no extra cost. So here's the challenge - read the Toolkit, keep the checklists handy and start applying the learning - one step at a time.

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2.2 Verbal Communication

The following guidance should be applied when designing how to communicate with customers verbally. While this guidance is focused on face-to-face, telephone and video communication; it equally applies to speeches, conversations, presentations, machine voice recordings and public announcements.

Use Plain English

Always use the simplest and clearest language possible. Avoid using technical words that your customer may not be familiar with. If you must use technical language, clearly explain what it means.

The Plain English Campaign provides plain English guidelines in their ‘How to’ guide, available from their website: [www.plainenglish.co.uk/files/howto.pdf].

Think about what you are saying

- Are you answering your customers’ questions?
- Are your customers familiar with the technical terms your business uses?

Speak clearly

Speak in a clear voice, clearly pronouncing your words.

Speak slowly

Take your time and speak slowly to your customer. Tailor what you are saying to meet your customer's needs.

Keep your message simple

State one piece of information at a time. Provide the information in a logical order.

State the purpose of your conversation

At the start of your conversation state the purpose of it.

Listen and respond to your customer

Be aware of the language your customer uses and their literacy level. In England 24% of adults have literacy and numeracy difficulties.
A requisite for hotel customers is that used towels are placed within the bathtub in the lavatory. This is to facilitate the replacement of washroom linen and cleaning by hotel staff.

Please place used towels in the bath. These will be replaced with fresh ones during cleaning.

Make text easy to read and understand

Think about what you are saying
Provide information using simple and clear language that is easy to understand.
Don't finish your customer's sentences

Don't interrupt your customers while they are speaking. Patiently wait for them to finish.

Ask open-ended questions

Use open-ended questions to gain more information from your customers. For example, “What questions do you have?”

Open-ended questions typically provide more informative answers, while closed-ended questions provide yes or no answers.

If you're not sure what was said, politely ask your customer to repeat the information

Alternatively summarise the information to check you have correctly understood the request.

Provide dedicated employees to help

Where possible, and if appropriate, have specifically trained employees to deal with customers who require extra time.

Make sure your customer understands what you've said

Questions and answers can provide a good way of finding out if your customer has understood the information.

Finish the conversation by saying thank you and good-bye

Tip

To improve your customer's experience, look at how you can improve communication provided by your organisation. This could include:

- Providing training on communication techniques such as interviews, presentations, tourist guiding, message taking, telephone dialogues and conversational skills.
- Providing training for employees on the accessibility needs of people with difficulties.
- Providing training on computer-supported video communication techniques.
Be patient. Don't finish your customer's sentences
Don't interrupt your customer while they are speaking. Patiently wait for them to finish.

I don't know what she said. I'll just nod and smile.

If you don't understand what was said, politely ask your customer to repeat the information
Face-to-Face Communication

The following additional guidance should be applied when communicating with your customer face-to-face:

**Introduce yourself to the customer**
Identify yourself when you approach your customer and speak directly to them.

**Wear a badge and branded clothing**
When communicating with your customer face-to-face, where possible, wear a name badge and branded clothing. This will make it easier for your customer to identify who you are.

**Speak directly to your customer**
For face-to-face communication, you should always speak directly to your customer. This is particularly important if a customer is accompanied by an interpreter (for people who have a speech difficulty or whose first language is not English) or companion (who provides assistance to the customer).

**Ask your customer “How can I help?”**
Depending on the context of your communication, if you’re not sure what to do, ask your customer how you can help. Don’t just jump in. Your customer will know if they need help and how you can provide it.
Put your card into the slot and enter your confirmation code to collect your ticket.

Hi, my name is Tom. Would you like some help using the ticket collection machine?

Introduce yourself to the customer and ask how you can help?

Hello madam, how can I help?

Hello sir, how can I help?

Speak directly to your customer
This is particularly important if a customer is accompanied by an interpreter or personal assistant.
Additional Information

Dealing with seemingly difficult customers

A customer's seemingly difficult behaviour often masks, or results from, some level of difficulty with hearing, mental health, understanding or cultural norms. Helpful guidance is provided below for dealing with seemingly difficult customers. This includes:

- Listen carefully to your customer and take their concerns seriously.
- Reassure your customer by letting them know you have heard what they've said and you've understood their feelings and concerns. Find some common ground you can agree on.
- Where your customer may be aggressive, confrontational, or are repeating the same point unnecessarily, tell your customer that you have understood and repeat their words back so it is clear you have heard them fully.
- Your customer may be unclear about what you can and cannot do. If you need to pass on the information to another department or agency, make sure your customer understands why you are doing this.

Try to pass on as much information as possible to the referral, so that the customer does not need to explain their situation again.

Learn more

Mencap provides ‘Communicating with people with a learning disability’ guide available from their website: [https://www.mencap.org.uk/Communicating_guide].
Face to Face, Telephone & Video Communication

Universal Design Toolkit for Customer Engagement

Verbal Communication Checklist

☐ Use plain English.

☐ Speak clearly and slowly. Keep your message simple.

☐ At the start of a conversation, introduce yourself to the customer.

☐ Where appropriate ask your customer “How can I help?”

☐ Listen first and then respond to your customer.

☐ Don’t finish your customer’s sentences.

☐ Speak directly to your customer.

☐ If you don’t understand what your customer has said, politely ask your customer to repeat the information.

☐ Make sure your customer understands what you’ve said.

☐ Finish the conversation by saying thank you and good-bye.

☐ Be aware of the importance of your non-verbal communication.
2.3 Non-Verbal Communication

Over 90% of your message is communicated non-verbally. This is influenced vocally (38%) by factors such as volume, pitch and rhythm, and by body movements (55%), specifically facial expressions.

Use a friendly smile and welcoming voice

It puts people at ease. All customers would like a good customer experience.

Be patient

Be aware that some people may take a little longer to understand and respond.

Listen to your customer

Your body language is an important part of your listening behaviour; be aware of your posture, eye-contact and facial expressions.

Face your customer when speaking

Make eye contact and face your customer when speaking to them.

Do not put your hands in front of your mouth while speaking

It is very difficult for people with hearing loss to listen or lip read if you have your hands in front of your mouth. This is equally true if you turn away from the customer while speaking.

Do not have your back to a light source

When you are talking to your customer, make sure you do not have your back to a light source (such as a window). This will make it more difficult for customers with a visual impairment to see you, or for customers with a hearing difficulty to lip read, as you will appear as a silhouette.
Hi Good morning, how are you?

I will show you to your seat.

Use a friendly smile and welcoming voice

Good morning, how are you?

I will show you to your seat.

Thank you

Look at your customer while speaking
It is very difficult for people to hear or lip read if you turn away from them while speaking.
**Keep background noise to a minimum**
Try to speak in an area with few competing sounds. This is particularly important as one in six customers have some level of hearing loss.

**Find a way of communicating that works for your customer**
For example keep a pen and paper handy to write information down if necessary. Alternatively, provide images that may help get your message across.

**Use alternative ways to communicate**
To accommodate different languages, where appropriate, offer information using non-spoken forms of communication; such as sign-language, universal symbols, translation software or phrase books.

**If you offer assistance, wait until you receive permission**
Never touch a person, service animal (for example a guide dog) or their assistive products (for example wheelchairs) without permission.

**Understand your customer’s cultural norms**
Be aware and have an understanding of the diversity and cultural norms of your customer base.

**Consider the distance you are standing from your customer**
Don't stand too close but also make sure you don't stand too far away.

**Treat all your customers equally**
Avoid stereotyping, racist attitudes, prejudice and discrimination.
Welcome to the Arts Venue. What is your booking number?

Loud background music playing...

Keep background noise and distractions to a minimum

The bus leaves at 18.00, 18.15, 18.35 and 18.50.

Find a way of communicating that works for your customer
Non-Verbal Communication Checklist

- Use a friendly smile and welcoming voice.
- Be patient.
- Listen to your customer.
- Face your customer when speaking.
- Do not put your hands in front of your mouth while speaking.
- Do not sit or stand with the light behind you.
- Keep background noise to a minimum.
- Find a way of communicating that works for your customers.
- Consider the distance you are standing from your customer.
- If you offer assistance, wait until you receive permission.
- Be aware of non-verbal communication when on video calls.
2.4 Telephone Based Call Routing and Message Service

If you use an Interactive Voice Response (IVR) System or call routing in your call centre, the following guidance should be applied:

**Keep call routing systems simple**
The call routing system should be kept as simple as possible. It should have no more than three levels, with no more than four options per level.

**If your customer doesn’t make a choice, divert the call to a live agent**
Where your customer fails to make a recognised choice, they should be automatically diverted to a live agent. This should automatically be done once the options have been presented twice.

**Avoid repetition or unnecessary gathering of information**
If it is necessary to transfer the customer to a different agent or department during a call, avoid gathering unnecessary information or repetition.

For example, where the customer has entered an account / booking number, you should pass this information onto the new agent.

**Only state important information**
Information that is important to the caller should be presented at the beginning of the automated response options. This is to ensure that the customer is not provided with too much information which would make instructions harder to follow.

**Provide options in order of priority**
Options should be presented in order of importance. This should be based on the types of calls that you most commonly receive. For example, in a hotel the most common option may be room reservations.

**Only provide frequently used options**
The options provided should be those that are most frequently used by your customers. This is to avoid providing an exhaustive list.
Inform your customer upfront of the number of options
Make a statement at the start of the call identifying how many options the customer will be asked to choose from.

Music or a signal should be given to indicate that the customer is on hold
Where your customer is placed on hold by the system, music or an alternative signal should be given, to let the customer know they are on hold.

Give an indication of the wait time
Where possible give the customer an indication of wait time or queue size.

Provide alternative ways to make contact
Provide an alternative channel for customers who are not able to use telephone based systems. For example, SMS messaging based communication.

Tip
Put details of your call routing or IVR on your website and where required in print. This will help your customers see what the options are and help them choose the option which is most suitable for their query.
Let the customer know their call is on hold  
A tone, message or music should play to inform the customer that they are on hold.

Inform customers of the number of options  
Make a statement at the start of the call indicating the number of options the customer will be asked to choose from.
Inform the customer upfront of the number of options to choose from and provide the options in order of priority.

- Only provide frequently used options.
- If the customer doesn’t make a choice, divert to a live agent.
- Music or a signal should be given informing the customer that they are on hold.
- Avoid repetition or unnecessary gathering of information.
- Provide alternative ways for customers to make contact.
- Where possible give an indication of the waiting time.
- Confirm when the transaction has been completed successfully.
2.5 Test your Knowledge

1. If you don’t understand what a customer has said you should:
   a. Politely ask your customer to repeat the information.
   b. Repeat or rephrase what was said.
   c. Guess what was said.

2. If a customer is speaking very slowly you should:
   a. Patiently wait for them to finish.
   b. Finish their sentence.
   c. Make suggestions on what you think the customer is looking for.

3. When talking to a customer over the phone who is having difficulty hearing you due to loud background music, you should:
   a. Move to a quieter location.
   b. Shout over the music.
   c. Turn down any background music.

4. When talking to a customer who is accompanied by a companion or interpreter you should:
   a. Speak to the customer’s companion / interpreter.
   b. Speak directly to the customer.

5. When speaking with your customer you should:
   a. Avoid turning away from them while speaking
   b. Avoid covering your mouth while speaking
   c. Turn away from them while speaking

2.6 Tourism Communication Design

All communication should be easy to access, use and understand to the greatest extent possible by all customers.

Development of face-to-face, telephone and video communication should be guided by the following four steps that are common to how we all process information:

- Step A: Perceive
- Step B: Discover
- Step C: Understand
- Step D: Use

These four steps are based on the process that customers typically go through to successfully use a product or service. Each of these steps are aligned with four of the seven Universal Design Principles.

Based on these four steps, questions are posed around how key Universal Design Principles are included in your products and services. Answering these questions will help you to evaluate how well you are integrating Universal Design into your products and services.

**Learn more**

Irish Standard 373:2013 ‘Universal design for customer engagement in tourism services’ provides further information on the four steps listed above in Annex E.

Centre for excellence in Universal Design (CEUD) provides information on the seven principles and 29 guidelines of Universal Design, available on their website: [http://www.universaldesign.ie/exploreampdiscover/the7principles].
Tourism Communication Design Question Set

The following questions support you in the development of verbal and non-verbal designs for customer engagement:

1. Do you provide the same information in different formats, such as through text or images?
2. Do you provide verbal information in plain English?
3. Do you support verbal information with plain English text?
4. Do your services work with assistive technology products and services?
5. Is information presented in order of importance?
6. Are options presented in a clear and concise way?
7. Is content presented in a way that is easy to understand and use?
8. For timed tasks, is enough time provided to complete the task?
9. Is your customer familiar with the words and symbols you are using?
10. Where appropriate, is the customer offered information in different languages?
11. When using phone systems, are the most frequently used options provided at the beginning and do the responses correspond with easy to access buttons?
12. Have you directly involved your customers in the process of design, development and testing?
13. Have you used specialised resources to represent customer capabilities and preferences in the process?
14. Has your organisation implemented a policy to promote Universal Design and conduct training to optimise verbal and non-verbal communication with customers?
The Universal Design Toolkit for Customer Engagement was developed by the Centre for Excellence in Universal Design at the National Disability Authority, in partnership with Fáilte Ireland. It was developed in consultation with a wide range of stakeholders involved in the tourism industry.

The Toolkit is based on the specifications contained in the Irish Standard (I.S.) 373:2013 ‘Universal Design for customer engagement in tourism services’, published by the National