



Customer Service Notes for

The Importance of Greetings

It has been said that “you never get a second chance to make a good first impression.”

With that in mind, consider how important your greetings are in fostering a culture of stellar customer service: whether in person, on the phone, or by email.

When greeting a participant in person, remember to smile and demonstrate positive body language. Add a “Good morning” or “Good afternoon” along with the participant’s name. If this is a participant other staff have worked with and you haven’t, and you are unsure of the pronunciation of the person’s name, check beforehand with a colleague. Also use your good judgement as to whether you call the participant by her first name, or instead are more formal with the use of Ms. or Mrs.

If your office has water or coffee available for participants, offering them some while you greet them is a nice gesture.

Also, be honest with participants. If your office is very busy and there will be a wait before you can meet with a participant, let them know. A statement such as, “Maria, we are running a little behind this afternoon. If you and Billy will have a seat in the waiting area, we will be with you as soon as possible.”

Greetings on the phone are more challenging since obviously the participants cannot see us. Remember to smile when picking up the phone and your pleasantness will come through. Also use a standard greeting that includes your office name and your name. Avoid adding “Lois speaking” at the end of the greeting. It is better to say, “This is Lois.” You can also add at the end, “How can I help you?”

Be careful during busy times not to speak too quickly on the phone. This can frustrate participants, who may not be able to discern your first name.

With e-mails, whether it’s to a participant or one of you co-workers, “warm up” the email by including “Hi Nancy” or “Hello Ms. Watson” at the beginning of your e-mail.

Whether in person, by phone, or via e-mail, how you greet participants can set the tone for the rest of your communication with them. By starting off on a positive note, you’ll increase the chances for a pleasant and productive interaction with the participant.

Questions for Reflection:

1. Do you ensure that you are correctly pronouncing the participant’s name when greeting them?
2. Do you smile as you pick up the phone?
3. Do you “warm up” your e-mails by starting with a “Hi” or “Hello” and the person’s name?

