


**E-ETIQUETTE:
KEEPING YOUR
CUSTOMERS HAPPY**
by Colleen Snyder, Image Dynamics colleensnyder@idimage.com



BENEFITS of E-ETIQUETTE

- Avoid complaints by customers to TDI
- Avoid complaints to State Bar for lawyers
- Effectively communicate respect and value to customers

CARNEGIE INSTITUTE

- 10,000 people analyzed
- 15% of job success is due to technical training , intellect and job skills
- 85% of job success is due to personality factors – ability to work with others



E-MAIL PROTOCOL

- What annoys you about the e-mails you receive?
- What can you do to make sure that others are receiving the messages you are trying to send?



E-MAIL PROTOCOL

- If you use it, check it everyday
- Check your spelling and grammar; re-read before you send
- Put purpose in the "subject line"; Put action in the first sentence/paragraph
- Make it short and to the point
- Be careful what you pass on to others

EMAIL-PROTOCOL

- Avoid "Reply All"
- Avoid long email "strings".
- If you've hit reply 3 times it is more efficient to pick up the phone
- Do not write anything emotional
- DO NOT WRITE IN ALL CAPITALS, IT READS AS THOUGH YOU ARE YELLING

CONFERENCE CALLS

- Do NOT conduct business on another line during a conference call
- Make sure that you are in a quiet place or put your telephone on mute
** know how to do this prior to call*
- If you have to put your telephone on hold, make sure that there is no music or talking in the background

CONFERENCE CALLS

Announce yourself when you:



- Join
- Speak
- Leave


❖ *Do not discuss private agenda items with everyone*

PDA's



- If you do not know the script well, take notes on paper and transfer them later
- Do not play with it, look at it or respond to an email in a meeting or when with a customer or associate
- Leave it on vibrate or quiet


 



FAXING



- Call before or after faxing
- Include a cover page
- Do not fax a “book” unless you have received prior permission
- Be careful not to fax confidential or revealing information







CELL PHONE

- Turn off your phone in “all” meetings
- If possible avoid using your cell phone in public
- Handling family emergencies
- Do not look at the phone while having a conversation with someone else





VOICE MAIL

Outgoing Messages:

- Keep it short
- Always state your full name and company name
- Update frequently if necessary

Leaving Messages:

- Always state your full name and company name
- Make your point, leave your phone number slowly at the end of the message
- Use clear articulation, enunciation and pronunciation



SPEAKER PHONE


- Get permission to put the person on speaker
- Make sure that everyone is announced and there are no surprises
- Everyone needs to be heard and needs to be able to hear






E-ETIQUETTE: KEEPING YOUR CUSTOMERS HAPPY




Thank you

For Escrow Officer Credit please email password and attendees names to ken.wrider@stewart.com for certificate (Please do this as soon as possible. Certificates will not be produced after the start of our next webinar)

One hour CE and CLE available

Next Texas TIPS Online
02-21-08 "Residential Construction Projects"
by Bill Pratt

Image Dynamics is in partnership with Stewart Title Guaranty. To schedule a class with Colleen Snyder please call our office 800.292.5712 or email Allison.James@stewart.com



www.stewarttexas.com

