

A clear next step

Four moves for clear customer conversations

When facts or timing are uncertain, use this sequence before committing to a next step. Follow approved policy and your role's authority.

01

Verify the facts

Acknowledge the impact. Ask one focused question at a time. Gather the evidence you need before diagnosing or acting.

Try: "First, what code is on the carton?" Then: "What code is on the packing slip?"

02

Explain what is known

Separate confirmed facts, estimates and unknowns. Translate internal terms. Explain what a status can and cannot confirm.

Try: "The email gives an estimate, not a confirmed delivery date. A warehouse status is about availability."

03

Ask before the action

Explain the action and its limits. Where authorization is required, wait for a clear yes before acting.

Try: "May I request a stock check? It won't reserve or ship a part."

No clear yes? Pause the request. Explain what has and has not happened; agree on an allowed next step.

04

Own the update

After authorization, agree who will contact the customer, by when, and what happens if information is still unavailable.

Try: "I'll contact you by [time], even if [status] is still pending. That is an update, not a delivery promise."

IF YOU NEED TO CORRECT YOURSELF

Name the exact error. State the accurate facts and what has or has not happened. Agree on the next permitted step.

"I said [claim]. That was incorrect. What I can confirm is [fact]. The next step is [action or question]."

BEFORE YOU CLOSE

- ☐ Facts and unknowns are clear.
- ☐ Required permission is recorded.
- ☐ Next contact has an owner and time.
- ☐ Update and delivery stay distinct.

BEFORE OPENING | FICTIONAL CASE EXAMPLE

Order: FX-12. Carton: FX-21. Packing slip: FX-12. FX-12 is not in local stock. "Priority transfer - ETA Monday" confirms neither transfer acceptance nor Monday delivery. Only if Lena authorizes the check: 11:30 is a status target that may remain pending; the representative owns an 11:45 callback even without a warehouse reply. The check does not reserve or ship a part.