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Institutional invitations to a meeting: Cold calls to bank clients

Elwys De Stefani

KU Leuven, Multimodality, Interaction & Discourse (MIDI), Blijde-Inkomststraat 21, Box 3308, 3000 Leuven, Belgium

Abstract

This article analyzes unsolicited telephone calls in Italian, wherein employees of a bank telephone existing clients in order to arrange a consultation at the bank. The study documents two techniques with which callers attempt to secure appointments: (i) they can convey an invitation to come to the bank as the reason for the call and subsequently disclose the purpose of the meeting (*formulation format*); or (ii) they can first report an event concerning the client and then attempt to organize a meeting (*solicitation format*). In the first format the invitation is proffered with a declarative clause, in the second format with an interrogative clause. Acceptance of invitations tends to occur early after the solicitation format and late in response to the formulation format. Conversely, rejection of the invitation occurs early after the formulation format vs. late in response to the solicitation format. Institutional invitations are done in the service of another objective, namely selling new services; the project of arranging an appointment is abandoned if clients accept to sign up for specific services. Using conversation analysis, this article illustrates how the ordering of actions and the choice of grammatical patterns are consequential for clients' responses to institutional invitations.

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1. Introduction: Arranging a meeting at the bank

Cold calls, in which salespeople solicit potential customers without prior contact, are an important part of telemarketing practice; and, of course, receiving such calls is a common experience for all telephone users. Whereas callers pursue the aim of selling a good or service, call-takers often experience unsolicited calls as annoying. Hence callers run the risk of encountering resistance, which may result in the rejection of the proposed deal. In the cold calls analyzed here, a bank employee calls existing clients in an attempt to arrange a meeting at which the client will be presented with tailored bank products. The expected upshot of these meetings is to get clients to sign up for specific financial services. Hence, bank employees pursue a twofold goal: indeed, a telephone call is successful if clients either accept the invitation to the consultation at a local branch of the bank, or agree right away to sign up for specific bank services without the need for a meeting.

Callers recurrently use two different practices to invite clients to the bank: either they use the verb *invitare* 'to invite', as illustrated in excerpt 1, or they ask a question (excerpt 2).

E-mail address: elwys.destefani@kuleuven.be.

Ex. 1 (obfc6, 00:07–00:18)¹ – The formulation format

- 01 BAN la chiamavo per questo. noi abbiamo il piacere di invita:rla
I was calling you for this. we have the pleasure to invi:te you
- 02 in banca,
to the bank,
- 03 (0.3)
- 04 BAN per un:: colloquio di consulenza volevamo farle conoscere la
for a:: consultation talk we wanted to present you
- 05 nostra soluzione:: .h eh per la famiglia ((bank product name)).
our solution:: .h uh for the family ((bank product name)).

This excerpt shows a format occurring immediately after the opening sequence, in *anchor position* (Schegloff, 1986), which is hence proffered as the reason for the call. The bank employee (BAN) first conveys the invitation (l. 01–02) and then introduces the purpose of the invitation—i.e., a consultation talk in which financial services will be presented (l. 04–05). It is grammatically structured as a declarative clause. Henceforth, I will speak of the *formulation format* when referring to this technique. Conversation analytic literature has mainly focused on *formulation* as a recipients' practice, by which the latter provide a version of what another member has just said or done (Garfinkel and Sacks, 1970; Heritage and Watson, 1979). For the purposes of this article, a *formulation* is a practice whereby speakers explicitly articulate what they are doing.² The second technique is associated with differing sequential and turn-constructual features.

Ex. 2 (obfc7, 01:15–01:21) – The solicitation format

- 01 BAN le interessava venire a sentire com'era
would you be interested to come and listen how it would be
- 02 senza impegno^o con un genitore per capire s- (.)
with no commitment or with a parent to understand i- (.)

This format occurs later in the conversation: the caller has previously cited the client's upcoming birthday as the reason for calling. On the client's birthday, the services offered by the bank will change; some will no longer be available to the client, whilst other news one will be. BAN has described these new products and services, and now invites the client to the bank, using an interrogative clause. BAN's interrogative clause is designed and treated as a first pair part, hence the label *solicitation format* for this technique.³

Within conversation analysis, the notion of *format* is primarily used with reference to the grammatical shape of turns-at-talk whereby speakers accomplish specific actions (e.g. requests, instructions). But “what exactly counts as a format” (Fox and Heinemann, 2016:502) remains an open question. The authors suggest that “the notion of format covers a much wider, more varied and much finer-grained composition of grammatical practices than has previously been described” (p.

¹ I use the Jeffersonian conventions for the transcription. A circumflex accent (^) is used to indicate linking of sounds between two units of talk.

² This use is reminiscent of Conein's (1987:41) notion of *quasi-formulation*, which the author uses for invitations that speakers articulate with the verb 'to invite'.

³ On one occasion, BAN says *io avrei bisogno di pas- fissare con lei un appuntamento*, 'I would need to pas- make an appointment with you', thereby using what we might call a *personal deontic declarative*—as opposed to the *impersonal deontic declaratives* discussed by Rossi and Zinken (2016). In that case, too, BAN starts the call by congratulating the client on her 18th birthday (as in the other instantiations of the solicitation format). Reaching the age of majority has a series of legal consequences for the relationship that the client has with the bank. BAN explains that the client has to sign specific documents by law, otherwise her bank account will be blocked. Rejecting the appointment is thus not an option, and this makes the 'soliciting' quality of BAN's turn even more tangible.

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