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Insurance discourse analysis: Identifying register variables and generic stages in English cross-border complaint calls

Abstract

Interpersonal meaning-making resources are construed by customer service representatives (CSRs) and customers in call center telephone conversations. The purpose of the present study is to explore the contextual features—specifically, register variables and generic stages—that American customers and Filipino CSRs employ to create meaning potentials in cross-border insurance calls. The results of this study reveal that register variables, specific generic stages, and various lexicogrammatical choices play significant roles in call center negotiation. The theoretical framework used in this research is Systemic Functional Linguistics (SFL), which provides valuable insights into the study of text at the register level, including field, mode, and tenor, as well as semantically, in terms of metafunctions. A data set of over 2000 English conversations from an insurance call center in the Philippines was examined, and 20 longer complaint calls involving complex negotiations were carefully selected for transcription. These calls amounted to approximately four hours of talk, resulting in a total of 39,440 words, and the findings highlight the register variables and common generic stages observed in the analyzed calls. It is observed that customers frequently use the recount strategy in call center encounters. Recounts are typically used by the customer in the Objection stage and are associated with delayed refusal in generic stages, contributing to the formation of experiential meanings. It is hoped that the present study provides insights into call center discourse in the insurance industry by identifying the register and generic features of cross-border complaint calls.

Keywords

Insurance discourse, register variables, generic patterns, cross-border conversations, telephone complaints

1. Introduction

Service encounters are regular exchanges in which various commodities are traded, such as material and linguistic goods (Ventola, 2005). According to Márquez Reiter and Bou-Franch (2017), the service encounter is an institutional genre that involves an institutional representative and a participant. Call centers are an important communication platform for customers and service providers to interact and exchange information and requests (Woydack, 2018). However, call center communication also poses a number of challenges and difficulties, especially when it involves cross-border and cross-cultural contexts (Puyod & Charoensukmongkol, 2019). One of the main challenges is knowing how to manage the interpersonal meaning-making resources that both customer service representatives (CSRs) and customers use to achieve their communicative goals and maintain rapport and trust. Interpersonal meaning-making resources include the linguistic and paralinguistic features that convey the attitudes, emotions, intentions, and expectations of the speakers, as well as the social roles and relationships that are established and negotiated in the interaction (Martin & White, 2005). In the insurance industry, customer satisfaction and efficient complaint resolution are critical for business success. As insurance service requests are complex, successful resolution requires effective communication and negotiation strategies between customers and CSRs.

The study of insurance discourse has attracted increasing attention due to its relevance in understanding the linguistic dynamics of customer service encounters. Register variables in the Systemic Functional Linguistics (SFL) framework are the situational factors that influence the linguistic choices and variations in calls, including field choices such as topics and degree of specialization, tenor choices such as power and affective involvement, and mode choices such as degree of

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interactivity (Halliday, 1975). Generic stages are studied to examine the overall social purpose of call center conversations. The typical stages or steps that structure a call center conversation, such as opening, identification, request, servicing and closing, have been identified (Forey & Lockwood, 2007); however, the register variables and generic stages used in English cross-border insurance complaint calls have not yet been thoroughly investigated. This study aims to fill this research gap by investigating the contextual features and meaning potentials used by American customers and Filipino CSRs in cross-border insurance complaint calls. For this study, an SFL approach is adopted, which is a useful framework for analyzing texts, particularly at the register level (e.g., in terms of field, mode, and tenor) and at the semantic level (e.g., in terms of metafunctions). SFL views language as a social semiotic system that realizes and constructs meanings in relation to the situational and cultural context. Understanding contextual elements can therefore help to understand how the CSR and customer construct the negotiation in telephone transcripts. The research questions guiding the study are:

- RQ1) Which register variables can be identified in service encounters in the context of insurance discourse analysis?
- RQ2) Which generic stages can be found in cross-border call center complaint conversations?

The study contributes to the growing body of research on call center discourse, which is an under-researched area within the field of applied linguistics. Furthermore, it provides insights into the cross-border and cross-cultural aspects of call center communication, which are relatively under-explored in the existing literature. The following section reviews the literature on language issues and discourse in call center research, and Section 3 outlines the SFL framework. The details of data selection are presented in Section 4. The findings regarding the register variables, generic stages, and recounting strategies in the data are examined in Section 5. The research is concluded, and the main findings are outlined in the final section.

2. Literature review

Discourse is a complex semiotic system that is used to create meaning within social contexts, involving a range of components such as language, gesture, and signaling (Iedema, 2003). The study of spoken discourse has historically focused on face-to-face encounters, particularly meetings and presentations (Bilbow,1998; Charles, 1996; Charles & Charles, 1999; Hood & Forey, 2005, 2008; Thompson, 2000), examining the dynamics of presenter–audience interactions and business negotiation skills. For instance, Thompson (2000) investigated oral communication skills and trends in spoken conversation, while Bilbow (1998) examined the linguistic and pragmatic characteristics of manager discourse in typical organizational speech events. Charles (1996) applied discourse analysis and business studies to explore the structure and vocabulary of sales negotiations. Meanwhile, Holmes (2020) focused on a range of contemporary issues, such as the growth of workplace transitions, digital workplace communication, and multi-cultural communities, in order to investigate aspects such as the dynamics of workplace interactions, the role of power and solidarity, and of gender and ethnicity in the workplace. Ventola (1987) employed an SFL approach to analyze generic stages in the exchange structure between postal workers and clients at a post office, while Reiter and Placencia (2004) contended that cultural patterns and preferred styles of communication can be identified through linguistic analyses of conversations.

In contrast, the telephone service encounter is a non-face-to-face encounter that includes various elements that contribute to the creation of meaning, including verbal exchange between the customer and the CSR, the computer screen in the call center office that the CSR refers to, the customer database, and even the simple beeping sound of the telephone. Early research in conversation analysis (CA) focused on investigating the sequential patterns observed in telephone calls, such as how calls are opened and closed, as well as the dynamics of turn-taking (Schegloff, 1968; Schegloff & Sacks, 1973). Subsequent studies examining service interactions have expanded beyond these specific aspects and explored dyadic interactions in different contexts. For example, Economidou-Kogetsidis (2005) compared the politeness strategies employed during phone service contacts in Greek and British English, with a particular focus on the degree of directness utilized by these two linguistic and cultural groups. Cameron (2000a) analyzed the sociolinguistic features of speech and vocal styles recommended for CSRs and adopted by customers, specifically addressing issues related to gender. To gather data, she conducted observations, interviews, and reviewed written training materials from call centers in the UK. Adolphs et al. (2004) conducted a thorough analysis of telephone conversations in the context of the British National Health Service Direct (NHS Direct), examining communication patterns in healthcare encounters. They investigated the usage of personal pronouns such as “you” and “your,” modal adjuncts such as “can,” “could,” and “must,” as well as the deployment of healthcare knowledge. The literature also demonstrates a growing interest in conflictual discourse among scholars, as evidenced by the studies conducted by Norrick (2013), Ardington (2013), Haugh and Sinkeviciute (2018), Kalbermatten (2018), Karafoti (2019), and García-Gómez (2018). These studies have explored various aspects of conflict, including aggression, discourse patterns, accusations, linguistic strategies, and the impact of conflict on relationships. However, there is a lack of consensus among researchers regarding the terminology used to represent concepts such as “conflict,” “aggression,” and “hate” (Janicki, 2007). To contribute to this area of research, the present study focuses on negotiation as a key aspect of conflict in conversations, particularly in call center interactions between customer service representatives (CSRs) and customers. Understanding how CSRs and customers interpret negotiation and the roles they play in telephone service interactions is crucial. Hood and Forey (2005) defined negotiation as a process that prioritizes interpersonal meanings over ideational meanings, where speakers foster a sense of solidarity by emphasizing shared attitudes and values. The present study aims to investigate complex complaint calls, defined as calls that involve complex negotiation (Wan, 2023a, 2023b), where negotiation refers to the “exchange of information, goods, and services in dialogue” (Martin, 2002, p. 55). The construction of meaning in dialogue and how interlocutors exchange ideas throughout the conversation are crucial aspects of call center service encounters. The study of negotiation is closely connected to the concepts of expected and discretionary responses (Eggins & Slade, 1997; Halliday, 1985). Expected responses involve “accepting an offer and carrying out a command,” while discretionary responses involve “rejecting an offer or command” (Halliday, 1994, p. 69). In complex complaint calls, customers present commands and customer service representatives (CSRs) provide offers. The CSR may refuse to follow the customer’s command, and the customer may reject the offer provided by the CSR. These discretionary responses disrupt the expected flow of exchanges (Burton, 1980) and necessitate further negotiation between the CSR and the customer. Complex negotiation can also be associated with dispreferred responses, which are linguistically complex and involve non-compliance or conflicting actions (Eggins & Slade, 1997). Moreover, complex complaint calls often involve recounts, which can be observed at the lexicogrammatical level through affirmative or negative choices in the polarity system of the mood network (Ventola, 1987; Martin, 1981). Examining telephone-mediated conflicts, Edmonds and Weatherall (2019) analyzed verbal and embodied behaviors in a corpus of New Zealand hotline services and investigated how callers interact with institutional representatives to complain and resolve disputes with energy and gas providers. Mugford (2019) emphasized the challenges faced in cross-border negotiations, particularly when operators lack native-speaking capabilities, hindering direct confrontation with customers. Furthermore, the reliance on scripted and standardized politeness routines by operators often leads to conversationally transactional talk (Lockwood, Forey, & Price, 2008; Cameron, 2000b). This practice presents disadvantages, as highlighted in the studies by Lockwood, Forey, and Price (2008) and Cameron (2000b). Since 2000, there has been a significant increase in the demand for CSRs to perform better, driven by market forces that exert strong pressure to adhere to standardized English scripts. However, the use of a restricted range of structures in serious complaint calls fails to provide a satisfactory response to the customer, resulting in customer indignation (Lockwood, Forey, & Price, 2008; Woydack & Lockwood, 2021), and relying solely on scripted responses to handle complaint calls is generally insufficient in terms of customer satisfaction (Cameron, 2000b). Cultural differences also play a role in effective negotiation, as seen in the example provided by Pan et al. (2002), where Chinese CSRs using excessive “please” and “thank you” phrases can be misinterpreted by overseas customers, leading to dissatisfaction. To enhance the client’s perception of the service encounter and improve the CSR’s negotiation skills in dialogue, Friginal (2010) suggested studying prosodic development. This approach can help CSRs to effectively handle negotiation by utilizing prosodic elements in their speech. By focusing on prosodic aspects, CSRs can improve the overall customer experience and successfully navigate the negotiation process.

In summary, previous studies have explored various aspects of spoken workplace discourse, telephone service encounters, conflictual discourse, standardized scripts, negotiation, and language use in cross-cultural contexts. However, little attention has been paid to the contextual features in cross-border complaint calls within the insurance domain. Further research is needed to explore the negotiation process during calls, as this is often when customers express the greatest frustration. Therefore, more linguistic research is necessary to comprehend negotiation, especially in terms of how customers express dissatisfaction and how CSRs respond to it. Understanding how individuals express dissatisfaction and navigate conflicts linguistically is vital for effective communication and conflict resolution.

3. Theoretical framework

The theoretical framework employed in this study is Systemic Functional Linguistics (SFL), which provides a comprehensive framework for analyzing text within specific contexts (Halliday, 1978, 1985). SFL was chosen as it can demonstrate "the relations between meaning constructed at clause level and meaning at the ‘larger’ levels (paragraphs and text), which in turn can be systematically related to the specified elements of the context" (Harvey, 1993, p. 25). SFL views language as both a function and a meaning-making system, considering its relationship with context, culture, and discourse (Halliday, 1978). The stratification hierarchy proposed by Halliday (2002/2005, p. 248) illustrates the context, semantics, and lexicogrammar strata, as depicted in Figure 1:

Context [culture --- situations]

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semantics [semantic system --- meanings]

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lexicogrammar [grammatical system --- wordings]

Figure 1. Stratification (Halliday, 2002/2005, p. 248).

A solid line separates the semantic and lexicogrammar strata, indicating a boundary (Halliday, 2002/2005, p. 248). The vertical reading of the stratification indicates that the lower stratum realizes the upper stratum (Halliday, 2002/2005, pp. 248-249; see also Halliday, 1991/2007, p. 275); for instance, lexicogrammar constructs semantics, while semantics realizes context (Hjelmslev, 1961; Martin, 2010). Language is understood to reflect and construct context (Coffin, 2001; Coffin et al., 2013; Martin 1992, 2010). Semantic units serve as the starting point for exploring the social semiotic relationship between language, society, and culture (Halliday, 1985). Register variables of the field, mode, and tenor help to classify text types (Halliday, 1977). Text types are also referred to as register types (Halliday, 1978, 1979, 1984). A register is a pre-selected semantic choice that constitutes the register variables of a text (Halliday, 1977, p. 203, 1975, 1988). Contextual features are the specific elements or variables that characterize each aspect of the context (Rudge, 2015); for example, tenor possesses contextual features such as power, solidarity, affect, and social distance. In call center discourse, the field refers to "ongoing social activities" (Halliday, 1975, p. 143), such as client service inquiries related to insurance policies, payments, and beneficiary difficulties. Tenor relates to "the roles and statuses of participants" (Halliday, 1975, p. 143; Halliday, 1988), with Filipino CSRs, supervisors, and American customers interacting in the data in the considered case (Halliday, 1975, 1988). In most calls, only the CSR and the customer (and, occasionally, the supervisor) interact. Their affective involvement is low, and the power levels of participants are asymmetrical. Mode represents the "interactional channels" (Halliday, 1975, p. 143; Martin, 2010, p. 16, also see Martin, 2001); for instance, the data for the present study were derived from English cross-border calls between Manila, the Philippines, and the United States. Manila and cities in the United States are in different time zones, separated by 13 to 16 hours. To accommodate businesses in the United States, call center work is conducted during the night shift in the Philippines, with call centers open from 8 p.m. to 6 a.m., corresponding to U.S. time for a *good morning/afternoon* greeting. This arrangement demonstrates that the call center is customer-centric and driven by mode choices.

SFL allows for an examination of register variables and investigates semantic choices in terms of metafunctions, including ideational, textual, and interpersonal meaning (Martin, 2010). Ideational meaning represents experience, textual meaning organizes text, and interpersonal meaning enacts relationships (Martin & Rose, 2007). This correlation provides analytical categories for readers to investigate the possible basis of context, in terms of the speaker's choice as well as grammar (Martin, 2010, p. 18). CSRs in call center conversations employ appropriate spoken language choices to co-develop positive interpersonal meaning potentials, especially when dealing with irate customers (Hood & Forey, 2008). General calls represent the majority of call center conversations, which are scripted, straightforward, and direct, and can be handled quickly by CSRs. A general call typically focuses primarily on the exchange of technical knowledge, whereas a complex call shifts from being technically and factually focused, with limited attitudinal choices found in the text, to being more evaluative, with a greater degree of attitude (one of the categories of the Appraisal system) found in the text (see Martin & White, 2005 for more information on the Appraisal system). In summary, the present study adopts an SFL approach to investigate the interpersonal meaning of insurance discourse in cross-border complaint calls. By considering the structure of contextual features, lexicogrammatical features, and semantics, this approach reveals linguistic choices that contribute to meaning creation in such interactions.

4. Methodology

To achieve the objectives of the present study, a corpus of over 2000 English conversations was collected from an insurance call center in the Philippines. From this corpus, a careful selection process was followed to identify 20 longer complaint calls involving complex negotiations, totaling approximately 40,000 words and four hours of talk. The transcripts were then analyzed using a combination of qualitative and quantitative approaches, in order to examine lexicogrammatical choices, register variables (field, mode, and tenor), and the formation of metafunctions. The audio data were gathered from English-language call centers that provide financial consulting, technology services, and insurance services in the United States. The available training material lack concrete definitions of semantics, lexicogrammatical features, and voice quality. Therefore, the importance of exploring these language areas conveyed by CSRs and customers through authentic spoken data is emphasized in this study. The transcribed texts were carefully anonymized to ensure confidentiality and ethical guidelines were followed. The selected calls consisted of approximately four hours of talk, with transcripts totaling 39,440 words and an average handling time (AHT) of 12 minutes. The conversations involved 45 participants, including 20 Filipino CSRs and supervisors, and 22 American customers (see Table 1). These texts provided an opportunity for an in-depth investigation of meaning potentials in complex calls.

Transcript	Topic	Duration	Words
1	Dissatisfaction with company policy	10 mins 04 secs	1,474
2	Dissatisfaction with company policy and payment	10 mins 06 secs	1,523
3	Wrong post received “I am not the policy holder”	9 mins 23 secs	1,682
4	Incorrect calculation of policy premium	14 mins 36 secs	3,015
5	Confusion about a notice	13 mins 43 secs	1,655
6	Refusal to provide date of birth information	11 mins 26 secs	1,954
7	Dissatisfaction with misleading information	17 mins 25 secs	2,563
8	Failure to understand the insurance policy	26 mins 31 secs	4,398
9	Payment of the policy	9 mins 19 secs	1,585
10	Failure to fulfil request	3 mins 44 secs	676
11	Policy problems	8 mins	1,698
12	No payment of the premium	15 mins 38 secs	2,413
13	Payment already done	8 mins 56 secs	1,674
14	Policy problem	9 mins 11 secs	1,997
15	Policy problem	15 mins 59 secs	2,531
16	Payment problem	14 mins 22 secs	2,162
17	Disclosure of information by CSR	8 mins 31 secs	1,534
18	Policy problem	7 mins 26 secs	1,420
19	Payment and time problems	10 mins 48 secs	1,750
20	Request for a mailing address	8 mins 22 secs	1,736
Total		3 hrs 53 mins 30 secs	39,440

Table 1. Summary Record of Data in Call Center Conversations.

5. Findings and discussion

The findings of the present study demonstrate the crucial role of register variables and generic stages in shaping the meaning potential of cross-border complaint calls. These linguistic elements affect the effectiveness of communication in the call center industry. Moreover, the frequent use of the recount strategy by customers in the Objection stage indicates the importance of experiential meanings in these interactions. By understanding register variables and generic stages, CSRs can improve customer satisfaction and facilitate complaint resolution.

5.1. Register variables in insurance discourse

The findings of this study explore the intricate relationship between register variables and the creation of meaning potentials in cross-border complaint calls. The analysis focuses on how these contextual elements, such as field choices (e.g., topics and specialization), tenor choices (e.g., power and affective involvement), and mode choices (e.g., degree of interactivity), influence the development of points of negotiation in call center conversations.

Field, as a register variable, encompasses the degree of specialization that can be achieved, ranging from common sense to specialized technical knowledge (Coffin et al., 2013, p. 216). In the specific context of the insurance call, linguistic features specific to the insurance industry were observed, including the use of technical vocabulary and professional jargon; for instance, terms such as the name of the department, policy details, and social reference numbers serve as examples of technical terminology/technical knowledge commonly used in call center conversations. CSRs often employ "abbreviated syntax" (see Eggins, 2004, p. 110), such as "EIC" to refer to "excellent insurance company" and "social" to refer to "social security numbers". These lexicogrammatical features are familiar to insiders within the insurance industry. Moreover, in Transcript 17, a customer explicitly requested a direct phone number (turn 86) to avoid the inconvenience of speaking to multiple CSRs and repeating their complaints. By making such a request, the customer demonstrates their assertiveness and knowledge about the operation of the call center. These lexicogrammatical features, indicative of specialized knowledge, allow the caller to identify the specific field choice being employed in the conversation.

The tenor variable refers to the relationships between the CSRs and the customers. Power and affective involvement are two extremely important factors to consider when investigating tenor relationships (see Eggins, 2004, p. 100). In most workplace dialogues, customers are assumed to have a greater status and more influence than employees. The position, experience, and authority of the speakers are all directly tied to their power (Coffin et al., 2013; Eggins, 2004), which ranges across a spectrum from power between equals (e.g., friends) to power between unequals (e.g., boss/employee; Eggins, 2004, p. 100). The tenor relationship between the CSR and the customer is typically unequal, and differs between general and complex calls.

The level of message complexity is generally low in general calls, due to their relatively simple nature. Previous scholarly investigations have indicated that, in such calls, customer service representatives (CSRs) typically possess higher authority and greater manpower compared to customers. CSRs acquire their authority by answering more questions and accessing the expert knowledge necessary for successful investigations (Coffin et al., 2013; Eggins, 2004; Eggins & Slade, 1997). During interactions in general calls, CSRs employ imperative clauses to execute commands as call center operators (for an in-depth analysis of operator commands, refer to Coffin et al., 2013, p. 216), while customers typically demonstrate "a degree of alignment/agreement" by accepting and complying with these commands (Coffin et al., 2013, p. 214). Consequently, CSRs exhibit a higher level of authority in general calls. In contrast, in complex calls, customers exert greater control over CSRs and the message complexity surpasses that of general calls. Due to a substantial degree of disagreement, alignment between the parties is notably low. As illustrated in Example 1, this lack of alignment may prompt customers to request a call transfer. The following examples include transcript turn numbers and incorporate turn numbers in the blanket. The labels "R" and "C" denote customer service representative and customer, respectively.

Example 1 (Transcript 18)

turn 22	C18	Ok, I need to speak to your supervisor because I said that (some girl) named Sally answered the phone
turn 27	C18	No, it was already sent out when you called to change your address, the request
turn 34	R18	I don't know if she's included in that or not. I really need to speak to a supervisor cos I (have) been going back and forth with (this) too long

In Example 1, the customer (C18) requests to speak to a supervisor after becoming dissatisfied with the current process. The CSR (R18) tries to explain that the necessary information had been sent. However, C18 continues to object to R18's service and asks to speak to a supervisor as she had been waiting too long and going back and forth (transcript 18, turn 34). The customer occupies a higher position, as she has the ability to choose the operator and believes that she requires the services of a more knowledgeable and authoritative operator. This option is considered to indicate that the client has more power in this case. In difficult calls, the CSR employs more interrogative questions and a low modality to soften their demands.

Furthermore, the degree of affective involvement from the participants can be used to express tenor choice. The level of involvement varies from high (e.g., lovers/friends) to low (e.g., colleagues; Eggins, 2004, pp. 100-101). The degree of specialization varies between a general call and a complex call, as previously stated. In general calls, the affective involvement between CSR and the customer is modest; however, it is strong in complex calls. The latter occurs as, during the objection stage, the customer utilizes a more negative attitudinal lexis to express their strong disagreement with the CSR and the institution. In Transcript 7, the caller expressed her dissatisfaction with the CSR's performance ("screw things up"). To calm the customer and reduce the level of dispute, the CSR is encouraged to utilize more positive attitudinal lexis, such as empathy; for example, in Transcript 8, the CSR reassures the customer by saying: "Yes, I understand," "I understand," "sorry to hear that," and "I am here to assist you."

The service exchange is not solely technical. The ability to recognize and manipulate the register variables allows the speaker to influence interpersonal meaning and choices in lexicogrammar features in call center conversations. Furthermore, the use of vocatives can promote high levels of emotive participation (Coffin et al., 2013; Hood, 2010; Martin, 2010, p. 24). The customer (C8) occasionally inquires about the CSR's given name, asking, "What is your name?" (Transcript 8, turn 2). The CSR (R8) replies "Molly" (Transcript 8, turn 3). The customer (C8) later addresses the CSR by name, saying "Thank you, Molly" (Transcript 8, turn 4). Calling the CSR by her first name can help to bridge social gaps and foster unity. However, to be courteous and create a professional business image, the CSR frequently refers to customers by their surnames. Furthermore, evaluative lexis might result in a high level of affective involvement. The customer expresses their satisfaction or dissatisfaction using evaluative lexis such as "helpful," "appreciate," "fed up," "peace of mind," "hate," "upset," "frustrating," "muck things up," and "annoyed" (Transcript 7). There are hierarchical disparities within organizations, as supervisors wield more power than CSRs. CSRs employ probability modals while speaking with supervisors on transfer calls. Some common CSR wordings may be realized probabilistically in call center texts (Martin, 2010); for example, "would you mind double-checking the information?" (Transcript 7). More modalities, such as "possibly," "maybe," "may," and "might" were observed in the data. Therefore, lexicogrammatical aspects of the text, such as vocatives, evaluative lexis, modality, and imperatives, can be used to deduce affective involvement and reflect tenor variables.

Martin (1992, p. 508) defines mode as "the role language plays in realizing social activity," which is realized through lexicogrammatical choices. "Mode is oriented to both interpersonal and experiential meaning" (Martin, 1992, p. 509). Interpersonally, mode is determined by factors such as aural and visual contact between the speaker and listener, as well as whether they can hear or see each other (Martin, 1992). In the considered case, the communication channel is an international phone call. Although telephone discussions are two-way and can provide immediate aural feedback, they lack visual contact (Martin, 1984, 1992). Interactivity and spontaneity, such as overlap and repetition, are used to achieve the turn-taking and dynamic interaction inherent in spoken speech (see Coffin et al., 2013, p. 221; Eggins, 2004, pp. 92–94). In complaint calls, the level of involvement and spontaneity might be extremely high. For example, when the client (C18) was extremely dissatisfied with the CSR (R18), she constantly interrupted the conversation to gain speakership. Example 2 illustrates overlap, which is shown in the transcript by two "equal" signs = =.

Example 2 (Transcript 18)

turn 27	R18	No, it [the information] was already sent out when you called to change your address, the request = =
turn 28	C18	No, no, I didn't call to change my address
turn 37	R18	Ok, I need another policy number so I can = = request
turn 38	C18	= = Did that girl, she didn't give that one to me

The CSR (R18) explains that [the information] had already been sent on request. However, the customer (C18) complicated the situation by rejecting the CSR's claim, as she had not asked for a change (turn 28), with “no, no” categorized as repetition. The CSR used repetition to reinforce the degree of negative polarity. The CSR (R18) subsequently proposed a remedy: “Ok, I need another policy number so I can = = request” (turn 37). The customer (C18) interrupted once more: “= = Did that girl, she didn’t give that one to me” (turn 38). The interactivity of spoken language in this mode is demonstrated by the lexicogrammatical qualities of overlaps in call center dialogue.

The study of mode encompasses the range of experiential distance in language use, from “language as action” to “language accompanying social process” (Martin, 1984, p. 26). In the context of call center conversations, language is employed to constitute a social process, such as customer service. In this setting, meaning creation heavily relies on the voice, as opposed to written texts, which can refer back to past material using exophoric references such as “here” and “there,” due to the lack of an explicit archival record (see Martin, 1992). The use of these references indicates that the text becomes reliant on another text, and the participants in call center conversations share a common body of knowledge. Furthermore, in the Opening stage of call center conversations, the predominant tense used is the simple present tense. For instance, the conversation often begins with a CSR introducing themselves; for example: “This is Betty. How may I help you today?” (R1, turn 1). When customers recall a previous activity or action, there is a switch in tense from the simple present to the past tense. For example, a customer may say “I got the letter in the mail” (C1, turn 24). By employing the past tense, the customer reconstructs their experience and replays the activity or action. Additionally, various lexicogrammatical features, such as greetings like “good morning/afternoon ma’am” and closing sequences like “have a great day” and “bye,” serve as markers for the opening and conclusion of a conversation. It is worth noting that, even though the call centers are located in Manila, the temporal adjuncts used by the CSRs, such as “morning,” “afternoon,” and “day,” are based on US time.

In conclusion, the context of the situation in which language is used is reflected in the register variables of field, mode, and tenor, where field refers to the topic or subject of the discourse, mode refers to the channel or medium of communication, and tenor refers to the relationship and roles of the participants. Register variables and generic stages are interrelated in call center conversations, as they influence and are influenced by the purpose and function of each stage. For example, in the opening stage, the mode is characterized by a high degree of interactivity and spontaneity as participants greet each other and establish initial contact. The field may be more general and vague, as the specific topic or problem of the call has not yet been revealed. The tenor may be formal and distant as the participants lack a personal relationship and use polite forms of address. In contrast, during the negotiation and transfer stages, the mode tends to be more planned and specific, as participants exchange information and present arguments related to the issue at hand. The field becomes more specific and technical as participants use specialized terms and concepts associated with the service or product. The tenor may become more informal and intimate as participants develop rapport and trust using personal pronouns, modal verbs, and hedging devices. It is important to note that these register variables and generic stages may vary depending on factors such as the type and nature of the call center service, customer expectations and needs, and the strategies and skills employed by the CSRs.

5.2 Generic stages in cross-border call center complaint conversation

For the present study, key generic stages within call center conversations were identified, providing insights into the role of each stage in the complaint resolution process. In particular, the findings highlight the utilization of the recount strategy by customers during the Objection stage. Each stage serves a specific purpose in the complaint resolution process and exhibits distinct linguistic features. In the Objection stage, customers often employ the recount strategy, where they recount their negative experiences to substantiate their objections. This strategy is connected to the delayed refusal observed in generic stages and contributes to the establishment of experiential meanings between customers and CSRs. To analyze genre effectively, Eggins and Martin (1997) asserted that the first step is to determine the purpose of the text. This global positioning of the text in relation to its overall purpose assists readers in interpreting the chosen meanings (Martin, 1999). The second step involves examining patterns of realization, such as staging, within the text structure (Eggins, 2004). By including transferring stages (see Wan 2023a for more details), the subsequent generic analysis confirms the existence of a simplified pattern, consistent with the generic stages published by Forey and Lockwood (2007) and Wan (2015). Table 2 provides an overview of the general patterns and includes examples to illustrate these stages.

Stage(s)	Explanation(s)	Example(s)
Opening Stage	This stage comprises introducing the organization, position, and name of the CSR, as well as demonstrating a readiness to serve.	Good morning, ma'am, thank you for calling Company EIC. My name is Ray. How may I assist you?
Identification Stage	This stage compares the caller's personal information, such as name, policy number, and phone number, to the information stored in the company's database.	Sir, what is the policy number?
Purpose Stage	This stage determines the call's intention(s).	Can I ask you this? His insurance was obtained through his mother. That's the first thing I'd like to know.
Clarification Stage	This stage double-checks facts or probes for further information about the caller's intentions.	Where did it come from, ma'am, and what office did it come from?
Objection Stage	The customer usually initiates the Objection stage when he or she expresses objection to or disdain for something.	It's crazy. No. It is not acceptable.
Legitimization Stage	The next step is to respond to the objections raised.	This means, of course, it's not due today. I was unable to pay it because I received it only yesterday.
Servicing Stage	This stage includes providing solutions, instructions, recommendations, advice, or explanations, as well as expressing regret or empathy.	I understand your issue. I'll send you a new notice as soon as possible.
Transferring Stage	When a CSR is in the transferring stage, they are dealing with a difficult caller or a challenging circumstance. They must request assistance from a higher-ranking third party, such as a technician or supervisor.	Yes, thank you for your patience; okay, I'll forward your call on to my supervisor.
Closing Stage	The purpose of the closing stage is to summarize the call and/or express gratitude.	Thank you so much for calling. Have a wonderful day. Goodbye.

Table 2. Generic Stages of Call Center conversations.

The generic stages of an insurance call include Opening, Identification, Purpose, Clarification, Objection, Legitimization, Servicing, Transferring, and Closing. Due to the private and confidential nature of insurance services, most customers often take the initiative during the Opening stage to provide their ID number, insurance case number, and/or social security number. It is crucial for CSRs to verify the caller's identity before discussing personal accounts. In the present study, call center conversations are categorized based on their complexity. A general call typically follows a staged progression of Opening, Identification, Purpose, Servicing, and Closing. However, a complex call may involve additional and intricate stages such as Clarification, Objection, Legitimization, and Transferring. Within the collected data, recounting was a common occurrence during the Objection and Legitimization stages. These recounts play a key role in the formation of experiential meanings and are connected to the delayed refusal and challenges in exchange structure. Two types of recounts were identified: event recounts, which are explicit and factual, and personal recounts, which are more implicit and intimate. These recounts are realized on the lexicogrammatical stratum (Ventola, 1987, p. 91) and can be represented as affirmative/negative options within the mood network (Martin, 1981). Customers inform CSRs about past events and experiences they have had, which, in this study, are referred to as event recounts within the Objection stage. Event recounts predominantly focus on the performance of former CSRs, previous customer service operations, and past experiences with the automated telephone system. When dissatisfied with a CSR's attitude or task performance, customers express their complaints by providing detailed accounts of what transpired. Examples 3–11 highlight the general linguistic features associated with event and personal recounts.

5.2.1 Event recounts in complaint calls

The utilization of a parallel structure is a significant lexicogrammatical feature of event recounts. In the lexicogrammar stratum, a parallel structure may be identified (Halliday, 1978; Martin, 2010). The customer describes his experience speaking with other CSRs in Example 3, transcript 10. To demonstrate the seriousness of the problem, C10 employs a parallel structure; that is, “I talked to/have talked to.” In regard to the fact that “they were all going to send this information to me and I had not received yet,” the problem had reached its apogee. The time sequence is indicated in this example using the past, past perfect, and past continuous tenses.

Example 3 (Transcript 10)

turn 25	R10	Yes, it is the same, ma’am. The social security number and the tax payer identification number—it’s the same. We just need the correct one so we can attach it to your policy
turn 26	C10	hm = = ok
turn 27	R10	= = That’s what you got you = = have (for)
turn 28	C10	I can fill this out, but I have talked to Mable, I talked to Jennifer, I talked to Mable last week, and I have talked to you before. I talked to a Peter before, and they were all going to send this information to me and I have not received it yet.

Another type of event recount is discussing prior service processes, such as recounting a dissatisfactory service experience. In Example 4, C15 bemoans his previous difficulties “I contacted them [here, “them” refers to the bank] many times,” and “they said they don’t know they don’t wanna sign.” Heteroglossia engagement—also known as reported speech—refers to the use of numerous voices in a text (Martin and White, 2005). Indirect reported speech in the data, such as “they said,” is used to project the scenario to legitimize frustration.

Example 4 (Transcript 15)

turn 70	C15	This is 15 years or 20 years ago, ok?
turn 71	R15	Ok (audible breaths)
turn 72	C15	The bank, nobody, I I I contacted them many times, OK? They said they don’t know, they don’t wanna sign anybody, you know, any officers because they don’t know it, ok? I, you know

In addition to the aforementioned examples of recounts, customers recalled their unfavorable experiences with the automated telephone system. In Example 5, Transcript 7, turn 32, the customer expresses his dissatisfaction with the automated telephone system, stating that every time he calls the organization, he has to wait 10 minutes. He used the lexical choice “fed up with” to express his disappointment, which is a negative attitudinal choice (Hood and Forey, 2005). The customer is reluctant to communicate with the present CSR and even seeks to communicate with a supervisor at the end of this session, as the negative sentiment reaches a climax. An automatic telephone system is sometimes associated with negative attitudinal lexical choices. According to Law (2007), one of the most common challenges callers face is spending a long time navigating through an automated call center telephone system; for example, to speak to a CSR, callers must go through the "Press 1 if... Press 2..." steps. The customer, on the other hand, will feel highly frustrated if the CSR on the other end of the line fails to grasp or address their issue. The customer expressed his dissatisfaction with the indirect and time-consuming automatic telephone system through the use of a negative lexical phrase.

Example 5 (Transcript 7)

turn 28	C7	I've sent a letter accompanying that, too, stating the amount. What's your name?
turn 29	R7	My name is Polly
turn 30	C7	And your last name?
turn 31	R7	Kenna, K-E-N-N-A
turn 32	C7	Ok, I am just documenting every time I talk to somebody cos, you know, I am a little fed up with him, telling me that I keep, every time I call your company, I got through ten minutes of waiting. Who's the supervisor I could speak with because I'm I'm little fed up with him.

To avoid using the automated telephone system, some customers seek a direct number to contact their prior CSRs. In the call center context, the direct number is classified as specialized technical knowledge (Coffin et al., 2013). For instance, in Example 6, turn 86, C17 asks the CSR to supply their direct number: "Is there a number where I can call so I don't have to go through all the bullshit on the, on the automated phone systems to get through to you people?" C17 is a seasoned customer and becomes impolite, as can be seen by his recount. In contrast, a customer who calls for the first time may not know the direct number. Due to technical issues and limited resources, providing an individual service number for each CSR is difficult for the call center company. This problem presents a significant challenge for both the customer and the customer service representative. The worst-case scenario is if the CSR is unaware of the issue mentioned by the caller and asks the customer the same questions repeatedly. This sequence returns the entire request-solving procedure to stage one. Hence, the caller may be required to repeat their experience and wait a few days for a response (Law, 2007). This delay triggers negative emotions in both parties.

Example 6 (Transcript 17)

turn 86	C17	Now, let me ask you one other question. Is there a number where I can call so I don't have to go through all the bullshit on the, on the automated phone systems to get through to you people? = =
turn 87	R17	= = I can = =
turn 88	C17	= = That's why I [was] acting that way; I, it's taken me two days to get through to anybody
turn 89	R17	OK

It is observed that one customer, after a long wait in line, had used the irony "Am I talking to the White House?", implying that the security and time required to speak to a CSR was excessive. Kalbermatten (2018) examined the function of verbal irony in conflict talk, and her analysis demonstrated how irony can be used to start, prolong, defuse, or end a disagreement among participants. If one of the participants does not acknowledge the irony, the trajectory of the conflict sequence may be obstructed. In such a case, the CSR responded with silence, dismissing the indicated anger and restarting the conversation with "Excuse me, how may I assist you today?" Both parties experienced negative emotions as a result of this response. However, the response did not escalate the conflict.

The divergence between expectation and reality is another intriguing point to consider. After an event recount, the customer usually follows up by pointing out a gap between expectation and reality, as shown in Example 7. C18 shared her expectations and the issue with the CSR who mishandled the directive (turn 28). C18 built her expectation in moves, "so I'm under the impression that she sent it out again." These moves suggest that the customer is perplexed.

Example 7 (Transcript 18)

turn 26	C18	Can I what? (Why I) and she was supposed to send out the information then. OK [I'm not]
turn 27	R18	No, it was already sent out when you called to change your address, the = = request
turn 28	C18	= = No, no, I didn't call to change my address. I called to inform [the company] that I know that, that I never got the first request, so I'm under the impression that she sent it out again cos the old bank costs me 10 dollars a month, you know. It may not be a lot, but I'm, I'm ready to to to cut off that bank, I'm ready to close that account, ok, we're going (to another month).

Customers build up their frustration at different stages throughout call center conversations. The customer, C10, even expresses her confusion explicitly after a divergence: "This is this what I am confused about, Peter, is the fact that the form I got said requested form enclosed. I did not request this." The divergence between expectation and prior experience serves to establish the scale of dissatisfaction, and an event recount significantly contributes to building this divergence.

Example 8 (Transcript 10)

turn 18	C10	What did you show on it?
turn 19	R10	It's a different one here
turn 20	C10	Well, it was not different when I called the other day, and this is this what I am confused about, Peter, is the fact that the form I got said requested from enclosed. I did not request this. I requested the other [form] and it was supposed to have been mailed.

As previously stated, the data indicate that negative polarity, temporal links, past tense/prefect tense, personal pronouns, reported speech, and repetition are common lexicogrammatical features of the event recount. The recount typically appears during the Objection stage. An event recount is used to summarize the problem. To construe the overall purpose of the text, specific lexicogrammatical features and individual generic stages are used (Martin, 1999), which can assist readers in comprehending and interpreting the text's meaning potential.

5.2.2 Personal recounts in complaint calls

Within the data, there are intriguing recounts that involve family or personal recollections. These recounts center around the caller's unfortunate personal experiences and/or inferior family background, which may lead to financial difficulties. The primary aim of these personal recounts is to evoke empathy from the CSR, as their empathy is vital for maintaining satisfactory call center service quality (Friginal, 2007). For instance, in Example 9, earlier in the conversation, Customer 9 (C9) rejects a demand to pay for her son's policy and expressed her helplessness, stating "I can't help it; I'm a senior citizen" (turn 35). In turn 41, C9 further expands on the family recount, criticizing her son's inability: "He can't do anything, he doesn't even know what today is." This portrayal of her son's inability reflects the significant mental and financial burden that C9 faces. To address the customer's inquiry, the CSR responds with empathy, saying "Oh, I'm sorry" (turn 40) in Example 9. Conversation analysts also examine empathic receipts, such as expressions like "oh lovely" and "oh, how dreadful." In the study conducted by Jefferson and Lee (1981) on telephone calls received by a suicide prevention center, they argued that empathetic receipts are inappropriate, as the advisor's empathic statement "oh my" tended to make the callers cry (Jefferson & Lee, 1981, p. 421). However, research by Potter and Hepburn (2003), Pudlinski (2005), and Kitzinger (2006) has suggested that reaction tokens are necessary, as the advisor's professional role is to provide comfort and strengthen the caller's confidence. Therefore, empathetic responses such as "Oh, I'm sorry to hear that" are encouraged for CSRs to use in call center conversations.

Example 9 (Transcript 9)

turn 39	C9	eh what eh eh eh can I find out what that is? Or
turn 40	R9	Oh, I'm sorry about, we cannot release the information out to you, but if you can put Earl on the line, we can give the information to = = him
turn 41	C9	Oh, no he, don't, he's, can't do, nothing. He doesn't even know what today is. That's why his mother, me, is taking over so that something [is] paid on his [behalf], better than nothing

C8 presents a similar personal recount in Example 10, Transcript 8: "I can't afford that; I'm disabled, and I can't do that because I don't work." However, she also mentioned a very important fact here: "but that's not your problem. It's certainly my problem." C8 gave R8 more personal information; this was clearly not an exchange of new information. In fact, the CSR does not need to know her life background to process the inquiry. Later, in this turn, C8 used another concessive marker to express her underlying meaning: "but the, it's truly aggravating and depressing." This personal recount is interpreted as a means of eliciting alignment, understanding, and empathy from the CSR.

An event recount differs from a personal recount in that it is more factual, explicit, and concentrates on recapping the previous service procedure, while a personal recount is largely implicit and attitudinal; namely, the topics discussed in an event recount are generally more technical than in a personal recount. A personal recount elicits more affective involvement than an event recount. Although the present study does not specifically investigate generic differences in recounts, the examples support the contention that women and men may present personal recounts differently. Females tend to tell their personal or family stories to the CSR through recounts. Cosper (2021) examined the role of conflict speech in the construction of feminist identity on social media platforms, such as bolstering the in-group while excluding the out-group. In the present study, the female customers aimed to blur their in-group and out-group borders and build alignment by providing personal information to the CSR. Semantically, these recounts contribute to the formation of an image of a helpless and weak person. However, one possible explanation is that the more helpless they appear, the more powerful they may be in establishing the gravity of their problem and seeking empathy from and alignment with the CSR. Consequently, they tend to present their objections with more powerful or affective linguistic choices. Thus, personal recounts are used to gain more ground, become more persuasive, establish more power, and seek solidarity with the CSR. Customers seek personal empathy from CSRs, which extends beyond the institutional boundary.

Example 10 (Transcript 8)

turn 68	C8	I have 60,000 lousy dollars' worth of insurance, and now he says that I can't afford it. He told me to pay 248 dollars on one policy and 222 on the other. It's impossible. I can't afford that; I'm disabled and I can't do that because I don't work, but that's not your problem. It's certainly my problem, but the- it's truly aggravating and depressing
turn 69	R8	Mhm
turn 70	C8	and I guess there's no answer to it, is there?

In the Objection and/or Legitimization stages, the customer introduces negative hypothetical situations as a form of storytelling. These circumstances are related to a possibly fictitious worst-case scenario. For example, in Example 11, C11 describes the hypothetical poor condition "and how useful is it when I die and no one can find me?" (turn 74). These hypothetical conditions are frequently expressed using a hypotactic clause complex.

Example 11 (Transcript 11)

turn 74	C11	Yea, and when I die and no one can even find me, how useful it is? It can't [be], and this is obviously if I die ha [laughter]
turn 75	R11	of course
turn 76	C11	and if no one can figure [it] out, then it's really an absurdity

To summarize, these recount moves serve to highlight the severity of the misery, to exaggerate the current poor condition to make it appear as a worst-case scenario and, most importantly, to compel the CSR to act and handle the situation, such as progressing it to the Servicing stage. Additionally, rhetorical questions based on a hypothetical circumstance are employed. For example, C1 expresses concern about "what happens, what happens if next month, you guys draw money again because that's unacceptable" (Transcript 1, turn 50). The self-response to this rhetorical question of "that's unacceptable" means there was no opportunity for compromise or negotiation. The lexicogrammatical choice for attitude is "unacceptable." This choice has a negative polarity and reflects the customer's inscribed attitude. Overall, the stages of Objection and Legitimization are optional, and are typically recurring stages in complex complaint calls.

6. Conclusion

The findings of this study highlight the important role of contextual features in insurance conflict and negotiation during mediated service encounters. In particular, the linguistic formulation of conflict was examined in an insurance context using actual spoken data from call centers in the Philippines. The present study analyzed the register variables and generic stages in English cross-border complaint calls within insurance discourse, with a focus on understanding contextual features and how texts are constructed (Halliday, 1994). Using SFL as a framework, insights into the linguistic features and patterns that distinguish insurance service encounters were provided.

Regarding the first research question, key register variables—field, mode, and tenor—that reflect the context of language use in service encounters were identified. The field in insurance discourse analysis varies from general to specific, influenced by a customer's familiarity with the topic. Specialized technical terms and jargon characteristic of the insurance industry were observed. The mode of communication varies from interactive to monologic, and the tenor ranges from equal to unequal. These factors are shaped by the need to establish contact, exchange information, and address the interpersonal relationship with call center participants. The second research question of the study focused on identifying generic stages observed in cross-border call center complaint conversations. These stages were considered to reveal the fundamental structure of the call. By examining these generic stages and their associated social purposes, readers can gain insights into the interpersonal meanings conveyed within the text (Eggins & Martin, 1997; Martin, 1999). Each of these stages serves a specific purpose in the complaint resolution process and exhibits distinct linguistic features and interactions. They illustrate the sequential progression of the call, starting from the initial contact and culminating in the closure of the conversation. The adoption of this generic structure in the present study holds potential for enriching genre studies concerning call center discussions. Particularly, the findings presented here shed light on the transfer process within complex calls, which has been insufficiently addressed in published linguistic studies. In addition to uncovering the generic stages, the analysis also revealed unique linguistic strategies employed by customers. For instance, the recount strategy was frequently used in the Objection stage, which customers utilized to support their objections and establish experiential meanings. It is worth noting that the identified register variables and generic stages were not fixed or universal; they may vary depending on factors such as the specific type of insurance service, customer expectations, and experiences and strategies of the CSR.

This study has implications for insurance discourse analysis and call center communication, as it revealed the linguistic features and patterns of cross-border complaint calls in the context of SFL. These findings can improve communication effectiveness, inform training approaches and service practices and, ultimately, enhance customer satisfaction. The results of this study suggest that call center training materials can incorporate the staging of the call, social purposes, and specific contextual and lexicogrammatical features of actual conversation data. It is also recommended that insurance companies and call center professionals recognize and understand these variables and stages, as they can guide effective interactions and improve overall service delivery. This study also opens up avenues for future research on the influence of cultural and social factors on intercultural communication within the insurance industry. For instance, future research could examine how multi-lingual inequalities, rooted in unequal social relations with specific communities (Tupas, 2015; Tupas and Salonga, 2016), affect the cross-border complaint calls between Filipino customer service workers and American customers. Such research can further contribute to a more comprehensive understanding of insurance discourse, thus improving communication practices and customer experiences in the globalized service industry.

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