

Customer Service Training

Quick Reference Guide

Set Goals

Remember that goals should be SMART!

- ✓ S=SPECIFIC
- ✓ M=MEASURABLE
- ✓ A=ATTAINABLE
- ✓ R=RELEVANT
- ✓ T=TIMED

Solving Problems

- ✓ Define the Problem
- ✓ Research and Analyze the Problem
- ✓ Establish a Checklist of Criteria
- ✓ List Possible Alternatives
- ✓ Evaluate Each Alternative
- ✓ Select the Best Alternative(s) as Your Solution and Discuss How to Implement It /Them

Some other ways of resolving a conflict:

- Competitive: I actively seek to get my own way
- Avoidant: I seek to avoid the conflict situation
- Accommodative: I seek to work out a mutually satisfying relationship with others
- Collaborative: I seek to work out a mutually satisfying solution with others
- Compromising: I seek to work out a solution in which we each give up a little to get some of what we want.

Tips on Taking Messages

Taking Messages Accurately and Completely

- Keep a pad handy.
- Write while you are on the line. Take notes as you handle the call, not after you hang up the receiver.
- Request, don't demand information. Say, "If I may have your name, please" Rather than, "What is your name and number?"
- Verify spelling.
- Get the first name too.
- Spell out phonetically if the name is difficult.
- Give feedback for verification. (For example, "So that's spelled J-a-y-s-o-n?")

What to Record

- To whom: The name of the person called.
- From whom: The name of the call and his business connection.
- Where: The caller's telephone number and extension number.
- What: The message itself.
- Why: Action requested and the action promised.
- By whom: Name of the person who recorded the message.
- When: Date and hour of the call.

Other Tips

- Listen attentively to the message.
- Check to be sure all telephone numbers are correct and use feedback for verification.
- Verify the spelling of difficult names, using phonetic "helpers" – people are sensitive.
- After the telephone call has been completed, make additional notes from memory.
- Attach to the message any papers, reports, lists of information that would be helpful to the called party.

Ways to Deal With Stress

Belly Breathing	Loosen your clothes, close your eyes, and taken ten or more deep breaths. Each time you exhale, count silently: "one," after the first breath, "two," after the second breath, etc., up to at least ten.
Visualize	Use positive imagery to boost your confidence and enhance your visible performance.
Music	Find a type of music that relaxes you, and play it when you need to calm down.
Acupressure and Massage	Holding a fingertip to the point of most pain or tension, and pressing very hard into the offending muscle for up to a minute can avert a headache or relieve tension.
Laughter	A good belly laugh can lower blood pressure, slow your adrenaline, and reverse the stomach acid that comes with negative responses.

Eliminating Customer Service Problems

Critical Evaluation	Question big pictures and then break into smaller components. Question each using How, What, Where, When, Why, and Who in the present tense.
Informal Surveys	Ask your customers what they want/how you are doing.
Focus Groups	These usually have 8 - 10 participants, pre-screened for subject matter experience, with structured, specific questions to ensure maximum flexibility.
N.G.T. (Nominal Group Technique)	Similar to Focus Groups but larger.
Fish Bone	This method allows participants to determine what causing the symptom through categorization.
Brainstorming	Any idea is considered, no poor or stupid ideas, no critical comments.
Benchmarking	See how others do what you do/use if applicable.

Listening Tips

- As people talk to you, mentally say to yourself: "Which means that...."(to be clear)
- Be clear in your own mind what you hope to achieve.
- Take the lead in conversations wherever possible. This gives you the psychological advantage, and you are in the stronger position to direct the conversation along lines that are favourable to you.
- Check your understanding with your six helpers: why, what, where, when, who, how?
- Talk less than you listen.
- Try silence.

Do's and Don'ts

Don't say: "He hasn't come in yet."
Do say: "He's not in his office at the moment."

Don't say: "She's on her coffee break."
Do say: "She's away from her desk at the moment."

Don't say: "He left early today."
Do say: "He's out of the office until tomorrow."

Don't say: "She's sick today."
Do say: "She's not in the office today."

Don't say: "He' on vacation for the next two weeks."
Do say: "He's out of the office for the next two weeks."

Phrases to Avoid Using

- "I believe he went to the men's room"
- "He's taking a nap right now." (This actually happened. The man had had a heart attack and his physician ordered him to rest 45 minutes after lunch each day, but this information would not be known to the caller.)
- "She has a doctor's appointment this afternoon."
- "He's at the barbershop."

Sentences That Damage Your Image or Lose Goodwill

- "I can't put your call through unless I can say whose calling."
- "I don't have anything to do with your problem."
- "He's busy, would you call him back?"
- "I'm working with someone right now, could you call back?"
- "There's nothing I can do about it – that's our policy."
- "We might have it but I don't know for sure."
- "We're about getting ready to go home – would you call back in the morning?"
- "I just came in – could you call back in about 15-20 minutes?"

Managing Difficult Callers

Description	What They Do	What We Do
Abrupt	<ul style="list-style-type: none"> • Speak quickly • Snap orders 	<ul style="list-style-type: none"> • Listen to what they have to say • Be service oriented and focus on what you can do to help • Speak quietly and be firm
Abusive	<ul style="list-style-type: none"> • Launches personal attack on your ethnic background, age, sex, position, etc. • May use profanity 	<ul style="list-style-type: none"> • Be quick • Refuse to justify yourself • Stay calm and defuse anger • If abuse escalates, get your manager involved • Record the events of the confrontation
Angry	<ul style="list-style-type: none"> • Demand immediate action • Often loud tone of voice 	<ul style="list-style-type: none"> • Listen closely to the problem • Apologize • Ask open ended questions • Stay calm and don't take it personally • Remain courteous • Propose an action plan – then do it!
Arrogant	<ul style="list-style-type: none"> • Exhibit a 'superior' attitude • Like to remind you of your place 	<ul style="list-style-type: none"> • Know your job and do it well • Know our products and services • Be professional and courteous
Bully/bossy	<ul style="list-style-type: none"> • Put you on the spot • Enjoy baiting or teasing you • May insult our products and services 	<ul style="list-style-type: none"> • Be firm • Stick to business • Ask closed questions to redirect the attack • Be professional and courteous
Closed-minded	<ul style="list-style-type: none"> • Put up barriers to understanding • Display a 'prove it to me' attitude • Often a hidden agenda 	<ul style="list-style-type: none"> • Listen • Ask questions to probe for hidden reasons • Acknowledge and empathize their concerns using phrases like, "I understand how you feel"

The Recovery Process

Apologize.	Customers want someone to acknowledge that a problem occurred and show concern.
Listen and empathize.	Show that you care about them as well as about their problem.
Fix the problem quickly and fairly.	Customers want what they expected to receive, and the sooner the better.
Offer atonement.	Often customers will look to you to provide some value-added gesture.
Keep your promises.	During the recovery process, you will often make new promises. Be realistic about what you can and can't deliver.
Follow up.	Don't assume you've fixed the person or the problem. Check to be sure!