

E-BOOK

# Customer Service Policy Examples



# Introduction to Customer Service



## Our Customers

“There is only one boss, and whether a person shines shoes for a living or heads up the biggest corporation in the world, the boss remains the same. It is the customer! The customer is the person who pays everyone’s salary and who decides whether a business is going to succeed or fail. In fact, the customer can fire everybody in the company from the chairman (CEO) on down, and he can do it simply by spending his money somewhere else.

Literally, everything we do, every concept perceived, every technology developed and associate employed, is directed with this one objective clearly in mind – pleasing the customer.”

Credo from Sam Walton the owner and CEO of Walmart – an international chain of department stores and the most successful company in retailing in the world. Mr. Walton is one of the most successful and wealthiest men in the US. “Look before you leap.”

## Customer Service in the 21st Century

Ask any CEO of a company, president of a bank, manager of an office, minister or staff person and they will tell you how important the customer is to their operations and success. In meeting after meeting, heads of industry, the

service sector, utilities, and government try to convince the audience how much they believe in customer service.

“It is our mission, it is our number one priority, it is our goal, it is why we are in business, etc...,” often prove to be mere epitaphs. Unfortunately, these same “customer friendly” executives go back to their offices, de-employ office staff, fail to initiate a customer service improvement plan and send memos out saying customer complaints are unjustified and overblown.

It is a contemporary mantra of service-oriented economies throughout the world that the customer is the key to success. Yet, how many of these same people are just miming what others say or think without ever actually considering what customers want, how to deliver good service, how to develop systems that enhance customer satisfaction and create a service friendly environment. The reality is that customer service around the world, with a few notable exceptions, is either declining or stagnating.

Technological developments have dehumanized service while economic pressure and high employee turnover have left customers wondering when they will receive proper service at a fair price and in a timely manner.

Why is customer service in such a “funk” – what is causing this service malaise despite the “lip service” being paid to the significance of the customer in contemporary business, government and public life? If customer service and contact with a customer or client are so important for the success of a company or organization, then why are some companies and organizations failing in this critical department?

Moreover, can a company offer good services/products at low or reasonable prices but still not meet customer demands and suffer financially as a result? Can a company know the needs and problems of customers without having contact with them and without listening to them?

This customer service-training manual will answer these questions and many more, providing numerous concepts and ideas of how to improve the service you offer customers.

Throughout the course of the manual we will come back to three fundamental elements that must exist and be cultivated in order for good service to flourish:

1. Expand your idea of service
2. Consider or reconsider who your customers are
3. Develop customer friendly service techniques & systems.

If you master these three fundamental elements, your customer service is bound to improve and mature.

We hope you will find that improving customer service and developing an internal system to guarantee continual proficiency is not the most difficult or costly endeavor in the world. Customer service improvement is not like sending someone to the moon, but it does require understanding, commitment, time and effort.

Companies or organizations that manage customer service the best are those who develop a policy and then stick to it. This may seem easy, and this manual will help you along in this process, but in an age of political transition, mergers and acquisitions, regulation and de-regulation, rapid management turnover and global competition, adhering to sound customer service policy can be quite a challenge.





# The Three Key Elements

## Expand Your Definition of Service

How you define service shapes every interaction you have with your customers. Limited definitions of service based on an exchange of monies for goods or service misses the overall point of customer service. “Service” should provide the customer with more than a product or action taken on his/her behalf. It should provide satisfaction. In essence, the customer should walk away pleased at the result of the transaction – not just content but actually happy. A happy customer will continue to be a buying customer and a returning customer.

Of course you want to give customers what they want but this is not always possible. If you define customer service only as giving customers exactly what they want you have missed another key aspect of service – helping the customer to decide what they want. This is more subtle and difficult, requiring listening, friendliness, and empathy on the part of your service provider. By addressing these less obvious customer needs you can provide the customer with alternatives to their obvious desires (expanding your business) and get to know your customers better. Knowing the customer is critical to success.

## Who are Your Customers?

Customers, buyers and clients want to pay a fair price for quality service or products, and feel satisfied they have paid for a service/product and received what they have paid for in return. They also want someone to take

care of them. They need someone to understand their needs and help answer them. They need someone to hold their hands and walk them through a process. Customer service starts with the ability to listen to the customer and find out through polite questioning what he/she needs or wants.

Customer service and contact with a client mean that the customer will be heard and his/her problems will not go unanswered or ignored. It also means getting to know your client, his/her likes-dislikes, ideas, background, etc

The other most important aspect to do is to listen to what the customer is saying. If people do not understand what is motivating the customer, they will not be successful in handling them. Do research on customers, their habits, and what they want and expect.

Most customer service is defined by how a company or organization treats “external customers,” but there is “internal customer service” as well. While this manual mainly addresses “external customers,” expanding your definition of customer service to include co-workers will lead toward even greater success. Remember, the internal customer chain is just like the external, we are all customers both inside and outside the company or organization. As a Wall Street Journal article succinctly put it, “Poorly Treated Employees Treat Customers Just as Poorly.”

## Develop a Customer Friendly Approach

One commonality among all companies or organizations that provide good service is the development of a system and attitude promoting customer friendly service. By “customer friendly” we mean viewing the customer as the most important part of your job. The cliché, “The customer is always right” is derived from this customer friendly environment.

Two critical qualities to the “Customer Friendly Approach”:

1. Communications
2. Relationships

The two main tasks of successful customer relations are to communicate and develop relationships. They don’t take a huge effort, but don’t happen instantaneously either. Positive dialogue/communication with your customers and developing ongoing relationships with your customers are perhaps the two most important qualities to strive for in customer service.

As will be discussed at length in Module Two, there are numerous techniques, systems, and “tips” to create the “customer friendly environment.”





# What Customer Service Means

As mentioned earlier, customer service means providing a quality product or service that satisfies the needs/wants of a customer and keeps them coming back. Good customer service means much more – it means continued success, increased profits, higher job satisfaction, improved company or organization morale, better teamwork, and market expansion of services/products. Literally, everything we do, every concept perceived, every technology developed and associate employed, is directed with this one objective clearly in mind – pleasing the customer.”

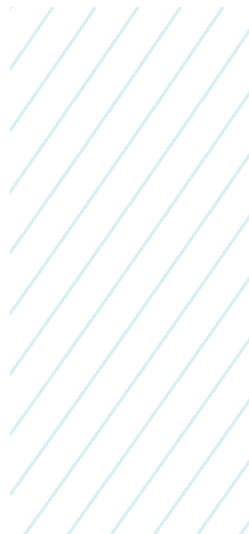
Think about if places where you enjoy doing business – restaurants, stores, petrol stations, suppliers, banks, etc. – why, aside from the actual product or service they provide, do you like doing business with them? You probably find them courteous, timely, friendly, flexible, interested, and a series of other exemplary qualities. They not only satisfy your needs and help you in your endeavors but make you feel positive and satisfied. You come to rely on their level of service to meet your needs and wants.

On the other hand, let’s review a business you dislike patronizing maybe even hate utilizing but in some cases do so out of necessity. Maybe it is the Ministry

of Transport when you need a new driver’s license or maybe it is the local department store that carries a product you need but who offers lousy service when you purchase. In both of these cases we are willing to hypothesize that the customer experience is marred by long lines, gruff service, inefficient processing, impolite and unfriendly clerks or salespeople, lack of flexibility, and no empathy for your customer plight. In these cases you feel abused, unsatisfied, and taken advantage of – in essence, your experience is wholly negative.

Unfortunately, in the cases we outlined above there is no competition for the services/products offered or you would gladly not consider using either the Ministry of Transport or the rude department store. This is the advantage of a monopoly on a good or service because in a competitive marketplace, the unsatisfied customer shops elsewhere.

Remember, good customer service results in consumer satisfaction and return customers and growth in business. Poor customer service, except for monopolistic strongholds, generally results in consumer dissatisfaction, lack of returning customers and dwindling business.





# Customer Service Qualities

## Customer Service = Accountability + Delivery

Customer service is:

- Fundamental
- Simple
- Daily
- Time oriented
- Persevering
- Specific



**A lot of people have fancy things to say about customer service, including me. But it's just a day-in, day-out, on going, never ending, unremitting, persevering, compassionate type of activity."**

**Leon Gorman**

*former President of LL Bean*

## Professional Qualities in Customer Service

Professionals who constantly deal with customers (inside and outside the company) need to strive for certain qualities to help them answer customer needs.

The professional qualities of customer service to be emphasized always relate to what the customer wants. After years of polling and market research, it turns out customers are constantly internalizing their customer service experience. What this means is they are grading your customer service during each transaction but you rarely know it. While there are a multitude of customer needs, six basic needs stand out:

1. **Friendliness** – the most basic and associated with courtesy and politeness.
2. **Empathy** – the customer needs to know that the service provider appreciates their wants and circumstances.
3. **Fairness** – the customer wants to feel they receive adequate attention and reasonable answers.
4. **Control** – the customer wants to feel his/her wants and input has influence on the outcome.
5. **Alternatives** – most customers want choice and flexibility from service. They want to know there are many avenues to satisfy them.
6. **Information** – customers want to know about products and services but in a pertinent and time-sensitive manner.<sup>1</sup> Too much information and “selling” can put off customers.

It is also very important for customer service employees to have information about their product or service. Service providers who answer, “I don’t know” or “It is not my department” are automatically demeaned and demoted in the mind of the customer. These employees can end up feeling hostile as well as unequipped. Customers want information, and they disrespect and distrust the person who is supposed to have information but does not.

## Good Information Is Often Good Service

Employees need to be empowered to satisfy customers. Employees will give bad service to customers if they themselves receive bad service and little feedback from their managers and supervisors. Remember: external customer service starts with internal customer service.







# Take an Honest Look at Your Customer Service

Survival in the world of customer service is predicated on critical evaluation. Honest self-appraisal is necessary if you are to understand the quality of service your company or organization is offering the customer.

Some companies and organizations never self-evaluate their service and operate in a form of denial. These companies fail to form an honest assessment of the kind of service they intend to deliver against the kind of service they are delivering.

Self-evaluation can be done by outside experts (consultants) or through internal questionnaires as well as customer surveys and focus groups within your company or organization. An aspect to consider when trying to decide how and who to survey is the level of honest feedback you will receive from results scrutinized in-house. Even anonymous in-house surveys conducted under “confidential” conditions can yield less than accurate results. Employees and staff are often reluctant to criticize their employer for fear of repercussions.

The critical factor in the success of self-evaluation is obtaining objective data and results. Better to accurately know the inadequacies of your customer service than to operate under the impression you are serving your customer well. In order to obtain complete information and feedback, it is important that each level of employee and each department participate in evaluations.

Once adequate self-evaluation has been conducted and you know where you stand in terms of customer service, you can organize a service improvement strategy catering to your service needs.

## Customer Surveys

Before spending the time, effort, and resources to develop a strategy for service improvement, you should take actions to make sure you know what your customer expects and wants from your service.

A base-line survey can provide a starting point from which to design and implement a customer service improvement plan. A base-line survey will:

- Provide specific feedback on customer satisfaction levels, wants, needs, and service requirements.
- Gives you objective, valid data on customer service requirements.
- Provide a benchmark for measuring customer satisfaction.

Admittedly, surveys require the expertise of outside consultants or market research firms and require expenditures on the part of your company or organization. However, these resources are well spent if you want to improve customer satisfaction.

There are many kinds of customer surveys, but the basic surveys include:

- Random customer survey
- Company-wide attitude survey
- Lost account survey
- Target account survey
- Customer exit survey

All the survey types listed above have their merits but the most common is the random customer survey. The random survey is the easiest to conduct and measures overall customer satisfaction on a range of levels. This methodology, typically done by phone, mail or in-person, selects a percentage of customers and randomly surveys them. If your organization has never conducted a market survey or customer survey, the random customer survey is probably the best methodology for you.

## Customer Base

The size and composition of the customer base to be surveyed is critical if the data will be valid to inform the ultimate customer service improvement plan. You need to assess the size of your customer base to determine the sample size for the survey. If your customer base is in the thousands, it makes sense to hire a market research firm to conduct the survey. A smaller customer base may not require the intervention of a professional market research firm.

## Service Feedback

Other types of service feedback include:

- Customer focus groups
- Polls
- Suggestion boxes
- Telephone Hotlines
- Public forums
- Customer evaluation forms
- Customer mail/email

Remember, if you do not know what your customer thinks about your service levels and performance, there is no way to inform your future customer service activities.

This section of the manual and training explores the often insignificant behaviors and actions that can lead to significant payoffs in customer service success. These techniques and ideas, seemingly obvious and mundane, cover a variety of communication skills leading to customer satisfaction.

When reviewing these materials keep in mind that customers are like elephants – they have long memories. They cherish companies who treat them well and quickly stop patronizing those who do not.

Key statistical consumer sector data revealed:

- Customers will spend up to 10% more for the same product with better service.
- When customers receive good service they tell 10-12 people on average.
- When customers receive poor service they tell upwards of 20 people.
- There is an 82% chance customers will repurchase from a company where they were satisfied.
- There is a 91% chance that poor service will dissuade a customer from ever going back to a company.<sup>2</sup>





# Non-Verbal Communication

## Body Language

Body language can say more than words. A recent university study on how people receive information had these results:

- 55% of what we learn from others comes from their body language.
- 38% of what we learn from others comes from their tone of voice.
- 7% of what we learn from others comes from the words they say.

## Communication is More Than Words



● 55% Body Language ● 7% Words ● 38% Tone of Voice

## Face-To-Face Conversations

It is often not what you articulate but how it is presented. What you wear and how you express yourself has a lot to do with how what you say is received.

Have you ever noticed how a person who is dressed-up, even in older or out-of-style clothing, always commands more authority and respect? The impression they make and what they have to say is enhanced by their personal On one level this seems unfair and superficial because what a person says and how they behave should be more important than if they are well groomed, smiling and dressed-up. Yet visual perception plays a vital role in human impressions and reactions. For reasons psychologists do not always understand, nature and learned behavior have taught humans to perceive neat, smiling, well-presented individuals in a more commanding manner.

For example, what better way to sell cosmetics or clothing in a large department store than to see well put together, groomed salespeople soliciting and serving customers? This has become a global industry standard because it works. People like to buy products, especially personal beauty and clothing products, from salespeople who look good in the very products they are buying. Customers visualize themselves looking like the sales people. Of course the most successful salespeople are also well trained and informed about their products, but it is initial non- verbal communication that first influences the interaction.

The same can be said for those who smile, laugh and make warm hand gestures – these people are well received and liked by others. “Warm” people immediately ingratiate themselves to others. What they say is often openly accepted, trusted and believed.

It is clear that just looking good will not produce the desired level of customer satisfaction. There is certainly a trend around the world in some of the most expensive retail outlets such as Gucci, Yves Saint Laurent, Giorgio Armani, and others for extremely well dressed, model-esque salespeople to address customers in an arrogant and disdainful manner. Even these retail fashion giants can lose sight of the basics of customer service and the famous adage of Sam Walton. These fashionistas need to remember the goal is to smile and present one's self well while at the same time delivering quality services and products to the buying public.

## Positive Non-Verbal Communications

It is often not what you articulate but how it is presented. What you wear and how you express yourself has a lot to do with how what you say is received.

**Smiling.** There is nothing like a smile and pleasant face to greet a customer, especially if he/she has a complaint. A smile and polite conversation can immediately disarm a disgruntled customer. Facial expression sets a positive tone before you even begin speaking. A relaxed or pleasant facial expression is ideal most of the time.

**Eye contact.** Always look into your customer's eyes. Directly address customers.

**How you look.** Personal grooming has a big impact on your customers. Dirty hands, messy hair and poor dress can mean the loss of an otherwise happy customer. When interacting with customers, dress neatly and in a professional manner so as to command respect and to let customers know you take seriously your position.

**Shaking hands.** When shaking hands with a customer a firm and professional handshake is expected. This part of the greeting is now common among both men and women in a professional environment.

**Be attentive.** When listening to a customer, slightly lean towards your customer and nod your head ever so slightly to indicate you are listening.

**Tone of voice.** Always convey friendliness and amicability. Do not raise your voice in frustration or anger no matter how difficult or tiresome a customer may behave.

**Hand gestures.** Use hand movements to emphasize what you say (even on the phone) and to emphasize your feelings.

**Personal space.** This is the distance that feels comfortable between you and another person. If another person approaches you and invades your personal space, you automatically move back without thought. You are uncomfortable. Leave adequate distance between you and your customer. Adequate space is important to making customers feel secure and safe.

**Posture.** Slumping in a chair or leaning against a wall while interacting with a customer are sure signs you are not interested in the customer. Your pose or posture should express attention, friendliness, and openness. Lean forward, face the customer and nod to let them know you are interested.

**Observation.** Notice how your customer behaves and what he/she reacts positively to while you are providing service.

Remember, the little, interpersonal actions noted above mean a great deal in the area of customer relations. They can change customer perceptions and ultimately affect the success of your customer relations efforts.





# Tone of Voice

It's not what you say, it's how you say it. The moment you pick up a telephone, body language and visual perceptions disappear and your tone of voice becomes dominant.

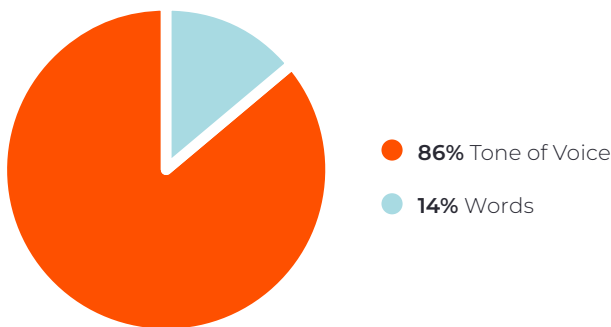
Almost the entire message you project to the customer over the phone is derived from tone of voice and attitude. For example:

- A flat tone of voice says to the customer, "I don't like my job and would rather be elsewhere."
- Slow pitch and presentation say, "I am sad and lonely – do not bother me."
- A high pitch, rapid voice says, "I am enthusiastic and excited!"
- A loud voice says, "I'm angry and aggressive."

Keys to good telephone intonation include:

- Inflection
- Volume control
- Pacing the customer<sup>3</sup>

## Communication is More Than Words



# Inflection

Inflection is what happens when you read a book to a child – it is the wave like movement of highs and low in your pitch that makes what you are saying higher or lower. It is the way you emphasize aspects of what you are saying to make it interesting.

When you repeat phrases and terms many times in a day, like many customer service representatives do, you tend to become monotone as the phrases have lost their interest to you. In telephone customer service inflection is pivotal and "monotone" lapses are the enemy. You can improve your inflection by:

- Practicing to stress certain words/phrases
- Regulating your breathing – make each breath deep and slow
- Exaggerating your tone of voice
- Changing around the phrases you use – repetition equals monotony
- Smiling when on the phone – this causes face muscles to contract, creating a more positive tone.

Be aware that too much inflection sounds unrealistic and artificial. Classic examples of over-inflection include radio announcers and some television presenters.

# Volume

Speaking in a moderate voice is the norm for customer service as high volume scares and intimidates people. Low volumes can be very effective, especially when a customer is irate – a low volume voice under these circumstances serves to calm the irate customer.

Speaking louder for short bursts can occasionally serve to emphasize or focus attention, but this technique should be used rarely.

## Pace

Pace is a great tool to build rapport with a customer. Customer service professionals recommend mimicking your customer's pace. Speaking too fast will serve to confuse a customer while speaking too slow may leave the impression you are talking down to the customer.

By controlling the pace of the conversation, you can get the customer to consider or reconsider what you are saying, and place emphasis on what you deem important. You are also able to articulate a solution or answer to a customer in a manner he/she understands.





# Telephone Etiquette

## The Dreaded Answering Service

In the world of customer service most people hate the telephone. It has become common in the US when calling a large corporation, business or service provider to come in contact with an automated answering service that prompts the caller to choose a series of numbers to attain their desired request. Often the service request or query must conform to the categories designated in the main menu or the call can be disconnected. It has become increasingly difficult to get in touch with a live human being.

If you are a new customer and have never used these systems then it is even more frustrating, especially if you do not have a Touch-Tone phone or are intimidated by these machines. Often you have to listen to five minutes or more of recorded banter before even being given the chance to speak to a customer service representative. Even when you are connected there is often a substantial amount of time spent on hold, waiting for a representative to become available. In addition, some customers find that after all that effort they have not been connected to the appropriate department for their needs, and must repeat the tedious process again.

When the proper person is finally reached, the customer is already frustrated and fed up with the process. The company has failed to provide adequate service even before they have learned of the problem.

Because every telephone encounter is blind, customer frustration is greater on the telephone than any other communication medium. The customer can feel lost with no connection, other than the audio, with the person on the other end of the phone. High-tech telephone systems eliminate even this human element. They are a cheap means of cutting labor costs but ultimately impede good customer service.

## Good Telephone Etiquette

Thankfully, there are many companies and organizations that understand the significance of the telephone in doing business and practice good telephone etiquette.

Good telephone etiquette is the essence of dealing with people in a polite and efficient manner over the telephone. It is one easy and definite way to improve customer service if you follow the guidelines outlined below.

Telephone etiquette, unlike more varying body language, can be uniform and is not culturally based. The telephone is often the first or last place a customer comes in contact with an organization or company. Being telephone friendly is one of the least expensive and cost-effective ways to deliver better customer service.

## Answering the Telephone

How a company answers the phone can tell the whole story of how they treat customers and employees. The correct phrase said in the right order in a positive tone leaves a good impression and starts the customer-client relationship off on the right foot.

1. Pick up the phone in three rings. More than three rings signals chaos in your office or inattentiveness on the part of your company or organization.
2. Greet the caller, e.g. “hello”, “good morning”. Good manners show you respect the caller.
3. Give your name, e.g., “Hi, my name is Martha”. This is a courtesy that serves to personalize the customer service experience as well as allowing the customer to hold you accountable for your level of service. He/she now has a point of reference and someone to contact when he/she calls back.
4. Ask the customer if or how you can help. Asking to help tells the customer you are there to serve his/her needs and to solve his/her problems. This also leaves the customer with a positive impression.

Put it altogether and you have a good example:

*“Good morning, thanks for calling the Intercontinental Hotel Lusaka. My name is Martha; how may I help you?”*

The greeting is key; it sets the tone and style of the whole interaction.

**The correct phrase said in the right order in a positive tone leaves a good impression and starts the customer-client relationship off on the right foot.**

## Troubleshooting

Some things which may upset a customer are simply unavoidable. Here are some tips on how to best handle these situations.

### “Putting a Customer on Hold”

- Ask the customer if you can put them on hold; wait for them to say “yes” or “no” and then explain it will only be for a short period of time.
- Explain to customers why you are putting them on hold.
- Thank customers for holding.

### “Transferring a Call”

Ask the customer if they mind being transferred; wait for them to say “yes” or “no” and explain why they are being transferred and to whom.

### “Taking a Message”

- Explain your co-workers absence in a positive light but do not be too specific. Explain that your co-worker is in a meeting, conference, briefing, or training. Do not say he or she is gravely ill, is too hung over to come to work, never called in today, can't be found, is playing golf, that you do not know where he or she is, or that he or she “was just here”.
- Give a reasonable estimate of when the co-worker will return.
- Offer to help the caller, take a message or transfer to another staff member.

If a co-worker is on holiday and will not return to the office for some time, it is permissible to say that he or she is on holiday. However, avoid details such as, “Raymond is at the beach and I am sure he is living it up.” While such details may seem innocuous and even humorous, they give the wrong impression to those seeking service.

### “Ending the Call”

This is the final step in good telephone etiquette. A good customer service representative ends the call on a positive note, repeating any actions agreed to be taken and what is going to be done to help or serve the customer.





# First Impressions— You Only Get One

## Making a Good First Impression

Every salesperson in every business knows the importance of making a positive first impression. Sales people know their success and livelihood will depend on how their potential customer perceives them in the first 30 seconds of interaction. Good salespeople develop an almost instantaneous rapport with potential customers. Customers like them, follow their advice and then buy their product.

The reality is that we prefer doing business with those we like and trust. Impressions are the key to developing trust and confidence in the customer.

As the old saying goes, “You will never get a second chance to make a first impression.” This is why the first impression is extremely important and can set the tone for all future transactions.

**Here are some ways of creating positive impressions, some of which have already been discussed:**

- Thoughtfulness in meeting the customer’s needs
- Personal responsibility for a customer
- Quick problem solving for customer
- Offering immediate assistance

- Friendliness
- Using customer’s name in a conversation
- Pleasant voice tone
- Polite and courteous manners
- Neatness
- A genuine smile

**Here are some factors that create a negative impression:**

- Making the customer wait
- Not answering the phone promptly
- Not saying “please” and/or “thank you”
- Speaking loudly or condescendingly to customers or colleagues
- Making faces, frowning, acting distant, not smiling
- Looking disheveled or like you do not care about your appearance
- A poor handshake
- Focusing on another task while addressing or servicing a customer.



# Ten Major Dos and Don'ts of Customer Service

Every day customer service representatives face situations when what they say makes or breaks a service interaction. Below are ten phrases that should never be used because they frustrate and anger customers.

1. “No.”
2. “I don’t know.”
3. “That’s not my job./That’s not my department.”
4. “You are right – that is bad.”
5. “Calm down.”
6. “I’m busy right now.”
7. “Call me back.”
8. “That’s not my fault.”
9. “You need to talk to my supervisor.”
10. “You want it by when?”

**No.** Everyone hates the word “no”. It is de-motivating, discouraging, and disinteresting. You will hear this word throughout your life as a customer and as a service provider. “No” is tantamount to “bad service.” “No” is easy, cheap, unproductive and negative – it means failure. Unfortunately, “no” is the word we most often hear when a new idea, request or concept is introduced. Admittedly, there are times when you will have to say “no,” but focus on what you can do for the customer (accentuate the positive) and not the negatives of the situation. Better to say “What I can do is...” and demonstrate that you care and want to provide quality service despite your current limitations.

**I don’t know.** Good service means never saying, “I don’t know.” When a customer hears “I don’t know,” they hear, “I don’t feel like finding the information you need.” Better to say, “I’ll find out” or “Let me look into this and get back to you ASAP.”

**That’s not my job. That’s not my department.** When a customer asks you to do something that you do not know how to do or do not have the authority to do, become a catalyst by leading the customer to the person or department who can help him/her solve the problem. Better to say, “Let me transfer you to the person who can immediately help you with this problem.”

**You’re right – that is bad.** Many inexperienced customer service representatives think by sympathizing with the customer’s plight, he/she will win over the customer rather than actually doing something to solve the customer’s problem. If a customer expresses annoyance or frustration, do not make it worse by commiserating with him/her. Empathize with the customer but seek to solve the problem.

Likewise, it does not do your company or organization any good to criticize co-workers or other departments within the company, or to the customers. All interested parties end up looking unprofessional and inept. Rather try your best to accommodate the customer. Do not promise anything you cannot deliver but do try to serve the customer well. Better to say, “I understand your frustration, let’s see how we can solve this problem.”

**Calm down.** When customers are upset or angry let them vent (within reason) and they will eventually calm down. Telling them to “calm down” is belittling, and often serves only to infuriate them further. Better to say, “I’m sorry.” This is one of the ideal phrases for customer service – it helps to placate the angriest of customers and allows you to begin the process of solving a customer complaint or request and “meet him/her half way.”

Apologizing does not mean you agree with the customer but it is a means to empathize and move beyond the emotion of the moment and negative impact.

**I'm busy right now.** It is not easy to juggle customers. You are often helping one customer when another calls or visits your service area. Asking a customer to be patient or politely asking them to wait is very different than putting them off and saying you are too busy to help. Leaving them standing there or on hold are two of the mortal sins of customer service. "Being too busy" is tantamount to saying that you do not care and they are not important. Let the customer know they are important and you are aware of their presence. Better to say, "I'll be with you in one moment" or "Please hold and I'll be right with you."

**Call me back.** This expression conveys little interest on the part of the customer relation's employee for the needs and wants of the customer. You should always call the customer back because you want their business and are responsive to their requests. Being proactive is part of good customer service.

**That's not my fault.** If an angry customer accuses you of creating a problem, rightly or wrongly, the natural reaction is to defend oneself. However, this is not the best course of action. The customer has a problem that needs to be solved. By resisting the need to defend yourself, and focusing on the needs of the customer, you can resolve the problem faster and with less stress and confrontation. Better to say, "Let's see what we can do about this problem."

**You need to talk to my supervisor.** This cliché of bad customer service has angered and frustrated customers for decades. Customers often ask for things outside the scope of your work or authority – maybe even outside the services/products provided by your company. While passing off these requests to your manager is a tempting option, it is better if you attempt to solve the problem yourself or directly go to the supervisor yourself and get a solution. You become a service hero for the customer and the supervisor. Better to say, "Let me find that out for you."

**You want it by when?** Customers often make unrealistic demands, especially when it comes to time. Your first reaction may be annoyance and you may want to make a snide or sarcastic comment. However, the best approach is to hold off on displaying a negative attitude and making a poor impression. Better to say, "I will call you right back after I find out if that is feasible."

**"The customer has a problem that needs to be solved. By resisting the need to defend yourself, and focusing on the needs of the customer, you can resolve the problem faster and with less stress and confrontation."**



# Customer Service Case Study: Five Easy Pieces

This Section will employ many of the ideas and techniques discussed in Sections 1 and 2, but will apply them to practical customer service.

A classic customer-service scene took place in the 1970s film *Five Easy Pieces* starring Jack Nicholson. In the film Nicholson plays a restaurant “customer” who spars with a grim, veteran waitress who cares little or nothing about the customer, her job or the restaurant where she works. She is the worst the service industry has to offer and a classic example of the “It is not my job” mentality.

The scene opens with Nicholson sitting down for breakfast in a small restaurant (diner):

**Nicholson:** I’d like a plain omelet, with no potatoes but tomatoes instead and some coffee and toast.

**Waitress:** No substitutions.

**Nicholson:** What do you mean? You do not have tomatoes?

**Waitress:** Only what is on the menu. If you want the omelet, it comes with French fries but no bread.

**Nicholson:** I know what it comes with but it is not what I want.

**Waitress:** (Frowning and impatient) I’ll come back in a few minutes because you are not ready to order.

**Nicholson:** Wait a minute. I am ready to order. I want a plain omelet with tomatoes but no potatoes, coffee and toast.

**Waitress:** (Angry) I’m sorry. We do not have toast and no substitutions.

**Nicholson:** What do you mean no changes and no toast?

**Waitress:** Would you like to talk to the manager?

**Nicholson:** You have bread so I know you can make toast.

**Waitress:** I do not make the rules.

**Nicholson:** Okay, I’ll make it easy for you. I’d like an omelet – plain. And a toasted chicken salad sandwich with no mayonnaise.

**Waitress:** Okay – (Writing) One omelet and a chicken salad sandwich. Anything else?

**Nicholson:** Now, all you have to do is remove the chicken, bring me the toast, give me a bill for the sandwich and you have not broken any rules.

**Waitress:** (Points to a sign reading – “We reserve the right to refuse service.”) You see that sign, sir? Yes, you can all leave. I’m not taking any more of your smart-ass sarcasm.

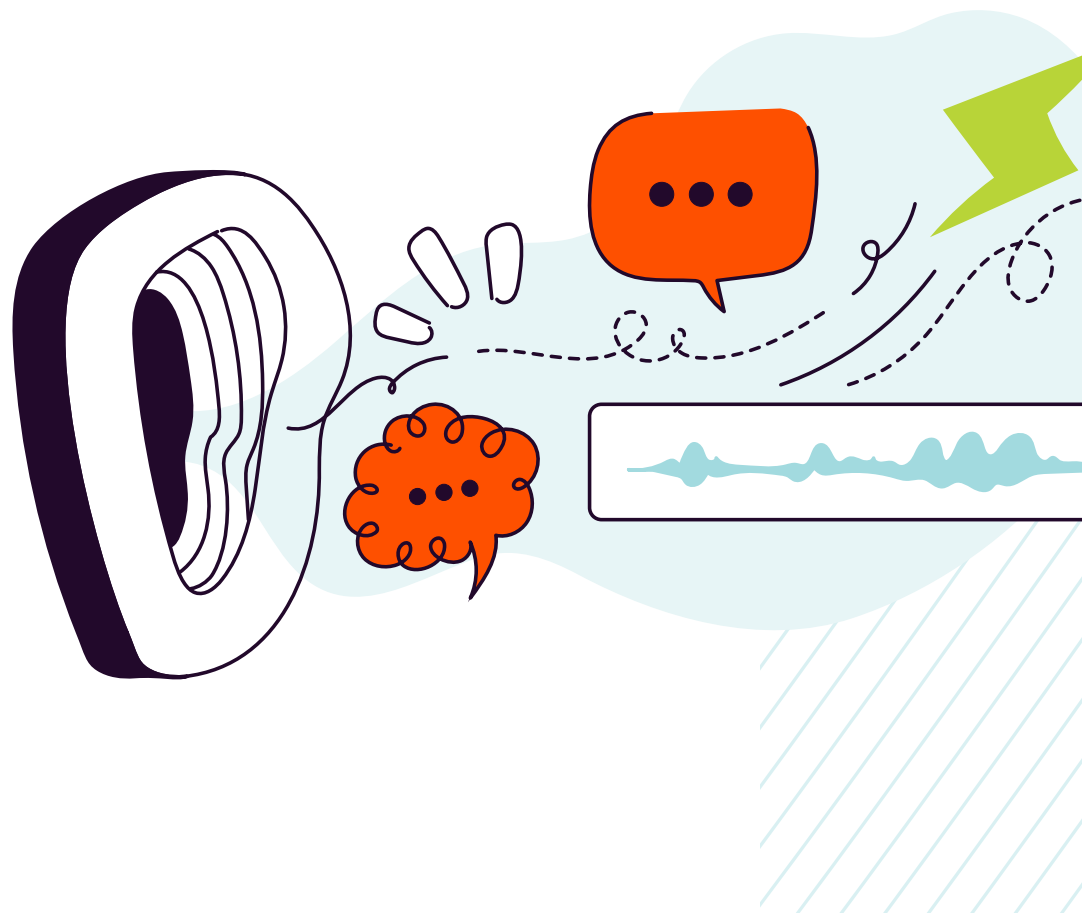
**Nicholson:** You see the sign? (Sweeps all the water glasses and silverware off the table and storms out).

As we discussed in Section 2, this waitress has broken many of the cardinal rules of customer service. She has a bad attitude, she is inflexible, resorts to referring to the manager, acts disinterested in the customer, and does

not address the customer directly. She cares more about the rules than the customer. In reality, it is the customer who is always right because he/she pays the bills and is the heart of any company or organization.

Everyone has come into contact with someone in the service industry who displays this horrible attitude and inflexibility. I am sure you have wanted to throw something and storm out of the place as well. Not only was the waitress rude, but she was costing the restaurant short-term business and a long-term customer. Her poor customer service damages business and ultimately profit

This is clearly a blatant example of how not to act towards customers. While the first or second time a customer may still come back, unless you have a monopoly, eventually the customer will not come back.<sup>4</sup>





# Communicating with the Unsatisfied Customer

How many times have you as a customer run into the problem of excuses. There is a problem and the sales person, technician or customer service representative is making lame excuses, namely:

It is the fault of the computer.  
It is the fault of the other sales clerk.  
It is the fault of the chief of the department.  
It is the fault of the system.  
It is the fault of the Government.  
Or it is just the way it is – c'est la vie.

Sometimes it feels as if nothing is anybody's responsibility. This is poor customer service. Good customer service means accountability, responsibility and taking action to satisfy the customer.

Having discussed the importance of knowing how the customer feels and WHAT NOT TO SAY, let's address the notion of how to communicate with an unsatisfied customer.

If your customer is unsatisfied (for just or unjust reasons), you will have to use some of the many techniques of the customer service professional to win their support and continued loyalty. When coming into contact with a customer, communicating with him/her, or analyzing problems, do not forget to use the following methods or qualities of the customer service professional:

**Listen:** It is of primary importance when dealing with an unsatisfied or complaining customer to listen attentively to his/her complaint, gripe, frustration or grievance. Be patient, attentive, and friendly.

## Express you are sorry:

- “We are sorry for this mistake/problem.”
- “We are terribly sorry for this inconvenience.”

- “How can we work to solve this problem together?”
- “I can imagine how frustrated you are.”

**Do not argue and do not interrupt.** This will only worsen the situation, especially if the customer is angry. Let him speak before you try to discuss with him what has happened.

**Do not lose your self-control.** If you stay relaxed, customers will calm down.

**Point out facts.** Listen carefully and write everything down. Do not make any comments until the customer is finished talking.

**Admit the problem.** If you can suggest a solution, do it. If not tell the customer what actions you will take and what actions will follow. Never make the mistake of promising something you are not able to do.

**Involve the customer in problem solving.** Suggest the customer alternative solutions, if they exist. Customers appreciate the opportunity to choose the ways of problem solving.

**Follow up.** Make sure that the promised measures are taken. If you do not fulfill what was promised and ignore the customer's complaint, the problem will grow. Next time it will be more difficult to solve.

**Give the customer a “way back.”** Sometimes customers are wrong. You should let them leave with dignity, without feeling embarrassed.

**Do not question the customer's correctness.** From the very beginning you should believe that the customer may be right. Always be open minded toward the customer's opinion, make them feel they deserve to be listened to.



# Solving the Customer's Problems

When you listen to the customer's complaint you take responsibility to solve the problem. Customer service professionals:

- Listen without interruption and with full attention.
- Behave without aggression, and without arguing.
- Do not extend excuses for the problem, and thank the customer for drawing their attention to it and helping solve it.
- Express sympathy and full understanding.
- Ask necessary questions to get more complete information and a completed picture of the situation.
- Find out exactly what the customer needs you to do for them.
- Explain first what you can do, and then gently add what you cannot do.
- Discuss in detail all opinions, and then decide what needs to be done.
- Undertake immediately what was discussed.
- Check the result to make sure the customer is completely satisfied

## Follow Up With The Customer

It is extremely important to make sure that all customer service measures that were discussed or promised are in fact taken. It is not enough for the customer to experience a satisfactory telephone or face-to-face interaction. If nothing comes of the contact they will be even more frustrated and unhappy. Make sure you do whatever you have promised in a timely manner.

## Follow Up With The Customer

Initiative is the difference between adequate customer service and customer service that wins you a customer for life.

Everyday examples of exceptional customer service:

- Taxi driver who opens the door for you or waits at night for you to safely get into your destination.
- Computer technician who does computer work and then calls back a week later to make sure your IT is functioning well.
- Car salesperson that calls a month after you buy a car to make sure it is running well.
- The petrol station attendant who washes your window or checks your oil.
- The electric company who calls and checks to make sure your service is working well and apologizes for any "brownouts" or "blackouts."

None of these customer service people HAD to make this extra effort or go to this trouble. These "goodwill initiatives"<sup>5</sup> are beyond the call of duty and make the customer beyond satisfied. They make the customer remember the transaction or occasion.

## Traits to Emulate

"Extra effort" wins the day for customer service!  
Customer service traits to emulate:

- Be on time, open on time, deliver on time
- Follow through and deliver your promises
- Go the extra kilometer for customers
- Offer you customer options
- Express empathy to upset customers
- Treat customers as the MOST important part of your job
- Treat co-workers as if they are customers
- Give customers your name and contact details<sup>6</sup>

## Examples of Customer Service in the Us Electric Utility Sector

Here are a few examples of Customer Service Challenges, and how they were analyzed and addressed in various cases. They are not all encompassing but provide concrete ideas of how electric utilities are meeting certain customer service challenges and needs.

Some of the information and challenges presented may not be relevant to your particular application or customer service needs but they offer creative and current solutions and thinking regarding customer service. Many of these customer service examples are derived from the US and UK and require a great deal of time and resources, making them unrealistic for smaller ventures. However, the fundamentals of “knowing your customer,” “meeting their needs,” and “communications” are present in each case and serve to highlight how to proactively meet customer service needs. They provide “food for thought” and are a basis for discussion, as the situations facing electricity utilities are relatively transferable to different environments, contexts and locales.

### Example 1: Ask Customer What They Think and How They Feel

Across various industries, executives and managers always believe they know the customer already and do not need further information or input from them. However, when research is conducted and the customer has actual input in the decision-making process, these same executives and managers often come to realize they do not know what customers want and need.

Renewable Energy is a popular option being considered by many to be clean and green, yet the structures necessary to install such systems can be intrusive or cause concern to people in the community. One way to alleviate or mitigate such concerns is to launch a survey or another form of communication with customers affected by a facility installation. By asking customers how they feel and what they think, the utility is demonstrating that communication is a two-way street and that they care about how customers perceive the intrusion of new facilities.

Prior to building new wind farms that would provide clean energy and new jobs for residents, a Scottish firm commissioned market research surveys to find out how people felt about an existing wind farm. Surveys were posed to both residents, who are customers, and to tourists, who support the local economy and are of critical concern to the residents.

The poll found a surprisingly positive view of the wind farm. Residents did not feel that they obstructed view of the landscape, or caused any other local problems, and enjoyed their influence on the local economy. Nine out of ten tourists questioned said the presence of wind farms made no difference to the enjoyment of their holiday - and more said they had a positive effect on their choice of destination. In this case, perceived negative ideas about wind farms asserted by many industry leaders were incorrect. They were based on poor information and myth. Data proved the wind farms were viable and acceptable to local residents and customers. The key is to willingly solicit the opinions of the customers you serve in order to provide improved service and benefits.

### Example 2: Gather Stakeholder to Reach Consensus

Power plants provide employment opportunities as well as electricity to local economies where they are located. They also can present risks and cause concern among the local population in the surrounding area affected by their development and servicing. In the late 1990's, the Niagara Power Project (NPP), located in Lewiston, NY, decided to build a new power plant, and went through the process of re-licensing. As part of the process, they were required by law to consult the public living in the areas of operation.

Rather than seek ways to squeak by with minimal local input, the NPP encouraged local governments, schools boards, manufacturers and fishermen to form a Task Force of stakeholders, so their views could be represented. They concentrated on addressing the Task Force's questions and concerns, and got the people involved in the plans for building the new plant. In the end all the stakeholders



were satisfied the plant would benefit the entire community without detriment.

By handling the process in such an open and consumer-focused way, NPP has set a precedent for future interactions with its customers. Customers know that they can trust NPP to keep their best interests in mind, and will more readily support future renovations and additions to facilities.

### **Example 3: Tailoring Special Programs to Business Customers**

Many countries today are dealing with the problem of too little electricity production and too much demand. When this happens, the reliability of the whole electricity system is put in danger. In several countries programs are in place to increase customer-sited generation and to reduce electricity use at peak demand times. Business customers are paid to participate in these programs and are given additional benefits.

This is not typically thought of as a customer service scenario. The old notion of customer service is answering telephone inquiries and administering complaints. These days it also means finding creative solutions to demand problems and customer needs. Today this new approach to meeting electricity needs with incentive-based programs is working, but first utilities had to sell the idea to large businesses and explain the logic of their approach.

Northeast Utilities, servicing much of New England in the U.S., implemented a Demand Response Program in order to make their electrical grid more secure in times of high demand. Local facilities were audited to see which ones could spare electricity at those peak times. When they had been located, the utility paid to have their facilities updated to become capable of cutting back on load or engaging backup generation remotely. They then set up a pager system so that managers could be instantly notified of the need for the power. The small investment necessary to enable customers to participate in the

program was well worth the added power obtained.

In southern California, an area facing a recent energy crisis, the Public Utilities Commission has started a program that pays qualifying businesses up to 50 percent of the costs of installing electricity generation systems. The Southern California Gas Company has been promoting the program through news releases, print and radio ads, e-mail notices, telemarketing and a dedicated toll-free number staffed with technicians who provide real-time responses to customer questions. By actively encouraging their business customers to rely on self-generated power, they are serving their individual customers better. Securing the electrical grid means a healthier economy for all of southern California.

### **Example 4: Communicating Emergency Situations to Customers**

Customers rely on electricity for their daily needs at home and at work. When there is an emergency resulting in an outage, customer service is critical to helping customers deal with the situation. Lack of electricity disrupts lives in a way that is extreme and consequential. Emergency communication and timely information is almost as important as completing the repair.

Emergencies call for extra efforts in listening to customers and providing timely information about repair work. Most companies faced with outage situations have plans in place for both field and headquarters staff to assume special roles during outage situations. For example, office administrative staff may be called upon to go out in the field while line crews are conducting the repairs just to talk with customers door-to-door, answer questions, help with coping strategies such as providing dry ice and flashlights, and provide reassurance regarding the repair effort.

If emergencies are not handled properly and proactively from a customer service standpoint, the company can

suffer from negative reactions for a long time. The key in emergency blackouts and brownouts is to have numerous contingency plans and a proactive strategy to deal with customer needs and complaints.

Last year in the Midlands, England, more than 40,000 homes, mostly in rural areas, lost power after a windstorm. Over 100 utility emergency crews were called into service. Although they were hampered by the strong winds, they managed to restore power to three-quarters of affected homes by that evening. Headquarters staff manned the telephone lines and supervisors knocked on doors to provide updates to worried residents about the repair efforts. The response to the utilities efforts was so warm that local pubs opened their doors to the workers to provide free meals (cooked on gas stoves) for the stamina required to complete the repair work. In spite of the hardships, customers expressed appreciation for the prompt services and ongoing communications about the status of repairs.

The success of the utility in this example is based on having customer-oriented contingency plans for emergency power outages. They developed emergency communications and public relations plans, and worked closely with the media and the local community. Rather than being a public relations disaster, this outage turned into a favorable situation whereby the rapid repair response and professional attitude and courtesy demonstrated by utility staff won over customers and the community.

More recently, a hurricane turned off the power of over one million people in Washington, D.C. The main utility, PEPCO, immediately surveyed the damage and reported that it would take a full week to restore power to everyone. As the week went on many customers became frustrated and angry. They weren't just angry because their power wasn't on, they were angry because the utility was not giving them any information on when it would be on. Specific neighborhoods were not informed, and people had no way of knowing if theirs would be one of the first or last areas to be serviced. Service representatives were forced to answer their requests with "I don't know." This event will have a lasting effect on the

reputation of PEPCO, and could have been avoided if better communications had been employed.

## Example 5: Segment Your Customers Based on Needs

Not all residential customers are alike, and it is important from a customer-service standpoint to understand what each type of customer needs for a successful relationship with the electricity provider. For example, you may think you know the answer to the question "How do customers pay their bills?" But one utility's experiences revealed that different types of residential customers pay in different ways, and that the variety of options was important to maintaining both a good relationship with the customers as well as timely payments to the utility.

Successful customer service offers the customer bill paying options and caters to the predilection of customers in target segments to choose certain methods of payment. For example, some customers may choose to pay by mail, while others typically pay in cash at kiosks or others over the internet. However, even if it is not possible to offer customers a variety of means to pay their utility bills, the most important fact is to make sure they are offered a convenient and easy-to-use method. The easier the payment, the more customers will pay their bills.

During a customer survey the utility PEPCO found that most elderly customers prefer to pay their electric bill in person at either a utility business office or a bank. Paying bills promptly and in person are important to this segment of customers. Households pay differently depending upon their income levels, with poorer customers paying in cash at pay stations (utility business offices or banks), working families by mail, higher income families and small businesses by automatic bank draft or through the Internet. In many countries of the former Soviet Union it has proved more effective for utility representatives to go door-to-door on a periodic basis, using the bill collector model, to assure payment. Of course this approach is only successful when it is done on a predictable schedule and by responsible, trustworthy utility representatives.

In other countries, prepayment meters are used for those customers that have very limited electricity uses in their homes. One example is South Africa, where local vendors at small community shops are empowered by the utility to sell Smart Cards to residents. These cards are then inserted in prepayment meter on the outside of the home. Electricity flows into the wires until the amount of money prepaid on the card is used up. Then customers have to go back to add more money to the Smart Card. By making this prepayment card service available locally, at small shops within each neighborhood, residential customers do not have to travel far to have their prepayment cards debited.

The only way to gather information about how consumers want to pay their bills is to know them better through surveys and focus groups. One cannot hope to provide great customer service without truly knowing your customer. Different ways to do this include forming stakeholder groups, holding public forums, studying focus groups, tracking paying habits, or discussing utility issues in informal gatherings.





# Customer Service Starts at the Top

Managers rarely understand how their actions, tone and attitude affect the performance and success of their staff. As a manager, the first step to motivating your staff is to demonstrate the customer service qualities you want them to emulate.

Here are a number of factors to take into account as you seek to mold your team into a successful customer service unit:

1. Greet your staff in the morning. Start out the day with a positive attitude.
2. Discuss your feelings. Do not ever vent or rage in front of your employees, but always remain calm. If you have a problem with one employee discuss it in private. Explain in detail why you are frustrated with their behavior, and allow the employee to speak openly and express their opinions. Try to come to a mutual solution with the employee.
3. Do the right thing. When faced with a difficult customer, follow correct customer service practices. In other words, practice what you preach.
4. Support your staff's decisions. As a manager, customers often ask to speak to you when upset, thinking you will overturn your employee's decisions. While sometimes you will correct an employee's mistake, often the employee was correct in their reasoning. It is important to build morale by sticking up for your employees. Collaborate with your staff, empower them to be flexible and act resourcefully.
5. Be willing to learn from others. Managers do not have all of the customer service answers; there is nothing worse than a "know-it-all" manager. There are opportunities for learning everyday if you are paying attention.
6. Learn to listen to what their customers need. A good manager, in order to reinforce this practice, should listen to employees and take their ideas, opinion and input into account.
7. Take time to socialize. Try to know your staff, their personal lives, and what is important to them. Take the time to celebrate achievements and noteworthy occasions. People are individuals and a positive work environment makes for better performance and a more content staff.
8. Use good telephone etiquette. Be your staff's best example of good telephone manners by following the guidelines.
9. Say "thank you." Be generous with compliments and praise your staff for their efforts. Thank them for a job well done and foster an environment of recognition. People enjoy praise and strive for recognition – give them something to work for!

Technical competence is not as important as people skills and attitude when it comes to customer service. The technical skills can be learned later but the motivation, attitude, and desire to provide good service is much harder to find.

Remember to be successful in customer service, you want people who enjoy treating people as individuals and who are prepared to accept responsibility for delivering what the customer wants.

One of the foremost ways to see improvements in customer service is through systemized customer service training programs. A training program enhances not only customer service but also teamwork, communications,

and management's understanding of its role in service. Customer training is not a panacea but it is a key component in your service improvement plan.

**Comprehensive training programs include different types of workshops on a variety of topics, including:**

- Awareness building
- Customer service skills
- Internal customer service
- Service management

Training methods vary depending on the size of your company or organization and the resources available. Classroom training or outside consultants can craft a short-term course for employees or more extended, ongoing training – however, it is critical that whatever type of training initiated, it be part of an overall management approach to customer service. In-house or external training programs will serve no long-term benefit if they are not integrated into an ongoing customer service improvement strategy. There is nothing worse for trainees or employees than to attend training, become empowered with new techniques and ideas and then come back to an environment where they are underappreciated and their new skills are not utilized. In the end, staff need to be able to practice what they learn.





# Hiring Customer-Friendly, Motivated Employees

Companies that provide good service devote time, energy and resources into influencing customer service. Training is important but you can only train so much, better to pick the right types of people and then mold them into good service providers than to try to create a great employee out of a person who is not interested in providing good customer service. Motivation is the key to successful employees and is an integral part of good customer relations.

Everyone has their own hiring system, but in the specific area of customer service there are a number of key questions to ask potential customer service representatives and employees who will represent your organization or company to the buying public:

- Does he/she really want this job?
- How does he/she feel about meeting the public/customers?
- What kind of a communicator does he/she believe they are?
- How do they feel about themselves?
- Are they easily upset, moody or prone to losing their temper?
- Do they like helping people?
- Does he/she feel service is important?

- How does he/she define service and good customer service?
- What type of attitude or outlook does he/she have?
- What kind of person do you like to serve you?
- What type of service do you like to receive?

These questions are critical in hiring the “right” type or profile of person for customer relations.

Individuals who are less social and are more interested in technical areas than communicating with people are better suited for other types of positions. You are looking for a “people person” who is not easily upset and understands the nature of customer service. Customer service is not unlike public affairs or public relations in that personal qualities and human contact are critical factors in professional success. Define your companies shared values and make sure the person you are hiring shares these same values. If your company or organization’s management does not place a premium on customer service, then employees will not emphasize customer service and will be frustrated by management’s lack of interest in this critical area. Remember, you cannot make people happy or motivated but you can hire happy and motivated people (i.e., people who smile and enjoy interacting with others).



# Customer-Oriented Company

The customer-oriented company or organization knows that success is directly affected by good customer service. They have taken into account the techniques and qualities discussed throughout this manual.



In summary, we have learned that the customer-focused company/organization has these qualities:

- Recognition is earned by employees who provide quality customer service.
- Managers support their staff in doing their job so they can in turn fulfill the customer service function.
- Internal promotion is based on job performance AND customer relations.
- Training staff in customer service techniques and etiquette is a priority.
- Employees know customer service is a priority and see themselves as an important link in the customer service chain.
- Participatory management style is common throughout the company.



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