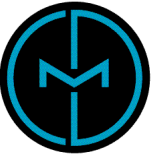


Taking C.A.R.E. of Business

*Choosing to Deliver
Remarkable Customer Service*



CMD PUBLISHING

Taking C.A.R.E. of Business

Choosing to Deliver Remarkable Customer Service

CMD Publishing
(503) 294-9979

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Margaret Jennings is President of The Jennings Company in Portland, Oregon. Since 1988 she has conducted seminars on customer service and written training programs on various topics for clients that include Fortune 500 companies, government agencies, and a wide range of customer-driven companies. Ms. Jennings also speaks nationally and is a regularly published author of articles on the topic of customer service.

About CMD Publishing

At CMD Publishing, we think it's fun to take training seriously. We like to make training products that make people think, maybe laugh a little, and think again about how and why they do what they do. We produce training videos, books and other media for corporations, government, and educational and nonprofit organizations.

“FRAME OF MIND” LEARNING

Our training media delivers what we call “frame of mind” learning. Our products are designed to give learners both a reason to take part in their training and a way to remember it. To us, audio/visual media is best suited to just a few “high altitude” tasks. First, a book, video, CD-ROM or online program must offer learners a frame of mind for the training, a way to think about the lesson content. Second, it must persuade them that they should take part in the training—that what we are trying to teach is worth learning. Lastly, it must provide them with a way to remember what we are trying to teach—a mental framework to easily recall the training when they need it most.

OUR OFFICES IN THE PACIFIC NORTHWEST

Much of our business is conducted from our branch office in Seattle, Washington, but our corporate headquarters are located in Portland, Oregon, from where we research, design, write, produce, package and fulfill orders for our products. Our Portland office building is also home to our parent company—CMD, Inc.—an integrated marketing, communications and training development company. CMD Publishing is more than just a division of CMD, Inc.; we're really a natural outgrowth of their core competencies and expertise. Creative Media Development employs about 120 full-time experts in the fields of training development and instructional design, film and video design and production, multimedia and Internet development, meetings and events, and graphic design, also taking part in the conception, creation and management of CMD Publishing products. We invite you to visit the main CMD Web site at www.cmdpdx.com.

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Imagine being treated in person the way some people treat you on the phone.

Are you with me?

Common Courtesy On the Phone

When we're with other people, we naturally tend to do what we can to understand one another, to ensure that we're communicating, to make certain we are making a connection. But when we interact with others on the phone, it's easy to lose touch with the basic rules of common courtesy. Wouldn't it be great if we all went out of our way—all the time—to treat each other on the phone the way we naturally know how to in person?

From making and taking calls to transferring calls and putting people on hold, to taking and leaving messages, *Are you with me?* connects all the rules of telephone courtesy to a single, simple, easy-to-remember concept: Treat the person on the other end of the line as though they were right there in the same room with you.

(includes 22-minute video, Workbook & Leader's Guide, Pocket Reminder Card)

It's Your Call

Remarkable Customer C.A.R.E. On the Phone

Truly great customer service professionals make a choice: Every day, with every customer, on every call, they choose to do all they can to make their customer's experience as positive as it can be. In other words, they care. And it isn't just that they want to care, it's that they know how to care. They know that to deliver remarkable customer service, you have to choose to be:

- C**ONNECTED Meet customers "where they are." Treat them like you'd want to be treated.
- A**TTENTIVE Give every customer your full attention. Guide the call by listening, being clear and checking in.
- R**ESPONSIBLE Own the call, never take things personally, and follow through. Remember, it's your call!
- E**NTHUSIASTIC Treat each and every customer as if they were your only customer.

From being an active listener and gracefully guiding phone calls, to handling dissatisfied customers and keeping a fresh outlook call after call, *It's Your Call* emphasizes personal accountability as it teaches your employees to actively improve their telephone customer service skills.

(Includes 23-minute video, Workbook & Leader's Guide, Pocket Reminder Card)



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When you're dealing with dissatisfied customers, never take things personally.

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How to Use This Book

WHO SHOULD USE THIS BOOK?

Taking C.A.R.E. of Business is designed to help people who deliver face-to-face customer service. Some of the people who will benefit from this book are those who work in retail stores, in the services industry, in healthcare, in financial institutions, and in the hotel industry.

People whose job it is to deliver good customer service on the telephone, or to take calls and transfer them, take messages, and make calls to others may find key skills for their jobs missing from this training program.

If you are looking for a training program on overall telephone skills, please contact your distributor or the publisher for information about the video and workbook titled *Are you with me?: Common Courtesy On the Phone*.

For those who serve customers on the phone, ask for the video and workbook titled *It's Your Call: Remarkable Customer C.A.R.E. On the Phone*.

WAYS TO USE THIS BOOK

This workbook is part of a flexible learning program that is designed to help you become a pro at your customer service job.

On Your Own: This workbook gives you a course on customer service which you can complete on your own. You'll get the most out of your study if you discuss your work with another person such as your supervisor or a co-worker who is experienced at doing your job.

With the Video: Use the workbook with the *Taking C.A.R.E. of Business* video. Watch the video before you use the workbook, section-by-section while you use the workbook, and again after you've finished the workbook. Tips for using the video for group training can be found on page 73.

In a Group: You'll get the extra benefit of others' ideas when you use the workbook for study in a group—with or without the video.

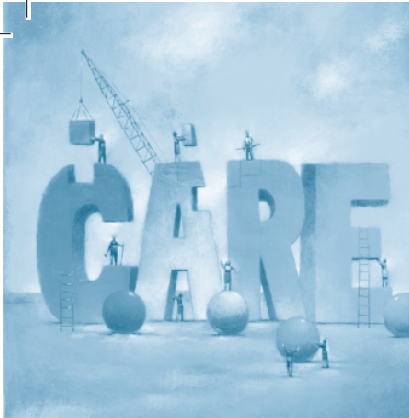
A Note to Trainers: A detailed Facilitator's Guide is provided, beginning on page 69. This thorough plan includes written session agendas, detailed lesson plans and tips for running group training sessions.

Enjoy your learning—and good luck providing remarkable service to your customers.

LEARNING OBJECTIVES

In this book you'll learn to:

- Identify your own reasons for giving customers remarkable service.
- Make a personal connection with each customer.
- Make a customer's needs more important than anything else, for the moment.
- Ask customers questions that will give you valid information about their needs.
- Keep customer service contacts on track.
- Communicate clearly with customers about what you are doing for them.
- "Own" the customer service situation.
- Avoid taking tough customers' attitudes personally.
- Identify options for helping customers.
- Identify ways to maintain your enthusiasm while working with customers.
- Use techniques for managing the stress of your customer service job.



Chapter 1: Why should you care?

While you may not discuss this question with your boss, it's reasonable to ask why you should put out the extra effort to make sure that each and every customer you talk to has a positive experience. After all, your job can be challenging. You have tough customers to deal with, and let's face it, we all have issues with our work from time to time that make our jobs less than perfect. Finally, your job may have repetitive elements that, at times, cause it to be less interesting than you would like. In the middle of dealing with all of this, why should you care? The simple answer is that it's better for you when you care.

IT'S BETTER FOR YOU WHEN YOU CARE

You and your customer are the winners when you care about the service your customers get. When you care, you get better responses from your customers, supervisors and co-workers. In the end, you get the most benefit. Here are reasons that experienced customer service reps tell us they care about the service they give:

- It feels good to help other people.
- It's the best route to salary increases and job advancement.
- My job is more fun when I care about the service I give.

What are your personal reasons for giving remarkable service?

SOME DAYS ARE HARDER THAN OTHERS

On some days, it may be tougher than it is on others to care about the service you give. That's why it's helpful to have a list of mental messages to help you maintain your ability to care about each customer interaction, even if things aren't going as smoothly as you'd like.

HARD DAY SITUATION	MENTAL MESSAGE TO YOURSELF
You encounter a customer who criticizes the solutions you offer and accuses you of not trying to help.	I'm not going to let this person influence my mood. I'm not going to take on their anger or stress or anxiety. I want to enjoy the rest of my day.
You have to help a tough customer who is unhappy because of an ongoing problem that you think your organization should try harder to fix.	The problem is outside of my control. I'll focus on what I do have control over, which is helping the customer.
A mistake was made in another department that is making it difficult for you to deliver what your customer expects. Your department didn't have anything to do with the problem, but now you have to deal with some unhappy customers.	There's nothing I can do to change things now. If I spend my time being mad at the other department, I'm the one who will be most unhappy. My best strategy is to focus on giving my customers the best service I have to offer.

What are some of the discouraging situations you encounter in your job?

What mental messages can you use to help you continue to care about your customers?

HOW TO C.A.R.E.

Caring about your customers starts with a decision to be committed to helping your customers in a personable and effective way, each and every time. In this book, we use the acronym C.A.R.E. to help you remember the four key ways that great service reps give remarkable service to every customer.

CHOOSE TO C.A.R.E.

CONNECTED

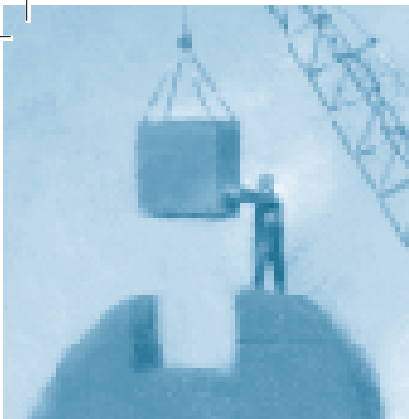
ATTENTIVE

RESPONSIBLE

ENTHUSIASTIC

ACTION STEPS

- Remind yourself regularly about the personal benefits you get from serving customers well.
- Use mental messages to help you care about the service you give, even when something challenging has happened.



Chapter 2: Be Connected

NOBODY WANTS TO BE TREATED LIKE A NUMBER

No doubt you've had the experience of trying to get help from a customer service rep who treated you like a number. You probably didn't feel connected to the person or the organization they represented, and you may not have gotten all the help you needed. That's because that customer service rep didn't make the decision to get connected, to let you know that they were with you.

We put out lots of signals that let others know whether or not we're really *here*—through eye contact, our smile, the very tone of our voice. In fact, it's almost impossible to really fool someone into thinking we care about them when we don't. When we genuinely care about someone, when we're *connected*, they know it.

One way to establish that connection is to treat every customer the same way you'd treat a visitor. Think about how it goes when you greet someone you know. You may start by saying something like, "How's it going today?" Then you notice the person's facial expressions and other body language, because these kinds of subtle cues are a two-way street. They help you get a sense for what's happening with the other person so you can respond in a way that fits the situation.

Ask yourself where the customer is really at. Are they in a hurry? Nervous? Wanting to chat with you? Are they unsure, or confident and knowledgeable? You've got to put aside where *you're* at and *meet your customers where they are*.

And what about the people you work with: aren't they your customers too? Just because you see them every day doesn't mean that it's any less important to get connected with them than with external customers.

EXTERNAL CUSTOMER	INTERNAL CUSTOMER
Notice body language and tone of voice.	Be just as aware of your co-workers' unspoken cues.
Put aside where you are and meet your customer where they are.	Treat your fellow employees as if they were as important as external customers because they are!

WHAT'S IN IT FOR YOU

In this chapter you will learn to:

- Decide to be friendly before you speak with your customer.
- Treat your customer like you'd treat a visitor in your home.
- Meet your customers where they are.
- For the moment, make their needs more important than anything else.
- Listen and watch for the meaning behind your customer's words.

GETTING THE JOB DONE ISN'T ENOUGH

It's likely that there's a lot you need to be on top of to do your job. It's also likely that you need to work efficiently with customers so you can help as many as possible. Even if you're polite and get the job done with your customer, you may still leave the person feeling left out in the cold. Here's an example of what happens when a customer service rep just focuses on getting the job done politely. No doubt, at some point you've been on the customer side of a situation like this.



THE MISSED CONNECTION: UNSUCCESSFUL CUSTOMER CARE

Rosa Diaz is an elderly woman who usually has the medication she takes for her heart condition delivered to her home. But in recent weeks, she has become confused about apparent changes to her health care coverage, as well as to the amount she must pay for her prescription. She has tried several times to get the information she needs by telephone, but has been unsuccessful, and so has taken a taxi to her local pharmacy in search of some answers.

John Can I help you?

Rosa I hope so. I tried calling in, but I could never figure out how to get a real person on the phone.

John *(Looking past her at the line of people behind her)* Uh, huh. What can I do for you, ma'am?

Rosa *(Unfolding a piece of paper)* This prescription for my heart pills; I don't understand why my Medicare isn't covering the full cost anymore. And you're charging me too much.

John We sent out a letter about new rates for certain medications. And you should have gotten another notice from the government about how much of the cost they're covering.

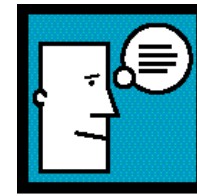
Rosa I never got any letters.

John The letters explained everything. Everybody affected by the changes got them.

Rosa Maybe I got them. I'm not really sure ...

John I can't really tell you anything about your Medicare coverage. You'll have to check with your doctor or call the government, I suppose. I think we've still got a copy of the letter we sent out on our computer. If you'll step aside and let me take care of these other customers, I'll print one out for you in a bit.

Rosa Oh, well, okay. Thank you.



THINK ABOUT IT

How would you feel if you were John's customer in this situation?

What were some of the things that John did that you would not have liked if you had been his customer?

Now that you've looked at what happens when a customer service rep isn't connected, take a look at what happens when a CSR decides to Be Connected. You may notice that being connected doesn't take any longer than not being connected.



A POSITIVE CONNECTION: SUCCESSFUL CUSTOMER CARE

- John** Hi. How are you?
- Rosa** Oh, fine; a little confused. I tried calling you for some information, but I could never get a real person on the phone.
- John** I'm sorry you had trouble with our phone system. I'll be glad to help you, though.
- Rosa** *(Unfolding a piece of paper)* This prescription for my heart pills; I don't understand why my Medicare isn't covering the full cost anymore. And you're charging me too much.
- John** I understand your confusion. We've been hearing that a lot from some of our customers about recent changes in the cost of certain prescriptions, and in some changes with Medicare. *(He pulls some papers from under the counter.)* Did you get either of these letters recently?
- Rosa** I don't remember getting any letters; maybe I did ...
- John** Well, that's fine. Let me go over them with you, and you let me know if it makes sense to you. And you can take copies with you too.
- Rosa** Oh, well thank you; I really appreciate your helping me.

THINK ABOUT IT

During this interaction, John did several things that helped Rosa to feel connected. What were some of the things that you would have appreciated had you been the customer in this situation?

HOW TO BE CONNECTED TO YOUR CUSTOMERS

It's a funny thing about customers. Within a very few seconds they know if you're really connecting with them. They know if you're going to do the best you can to meet their needs. That's why it's important to Be Connected from the very beginning of your contact with your customers.

Decide to be friendly before you say anything to your customer. You're the one who is in control of the way you look and sound. What the customer sees is what the customer will really hear, regardless of the actual words you use.

Treat your customers like you'd treat visitors in your home. When visitors come by, you'd want them to feel welcome. Let customers know with your tone of voice and with your body language that they are welcome and that you really want to assist them.

Meet your customers where they are, putting aside where you are. Meeting your customers where they are means looking for clues about their real needs or wants. Size your customers up, and treat them the way you would want to be treated.

For the moment, make their needs more important than anything else. There may be other customers waiting or you may be having problems fulfilling the needs of your customers, but they don't need to hear about anything but how you intend to help them.

Listen and watch for the meaning behind your customer's words. Does your customer seem confident and knowledgeable, or anxious and unsure? Does your customer seem to be in a hurry, or do you get a sense that they'd like you to slow down? Pay attention and respond accordingly.

WHAT WORKED

Take a closer look at the successful example to see how John quickly and easily helped Rosa to feel comfortable and welcome by using each of these ways to Be Connected.

He decided to be friendly before saying anything to his customer, which was demonstrated by his empathetic response to Rosa's experience of not being able to get the information she needed.

He treated his customer as a visitor by making her feel comfortable about her confusion over new prescription fees and her medical plan coverage for those fees.

He met his customer where she was by apologizing for any inconvenience she experienced and by acknowledging her need to receive accurate information.

He made her needs more important than anything else at the moment by giving her the answers to her questions without making her feel as if she were a burden, or that he had something more important to do than help her.

He listened and watched for the meaning behind her words, which prompted him to apologize for her frustration and then take time to go over the information contained in the letters she'd already received, even though it was likely they contained the information she needed.

A QUICK CHECK-IN

Here's a quick test you can take shortly after the beginning of each customer service situation to decide if you're connected. If you can answer these questions, you're likely to Be Connected.

10 Second Connection Test

- m *What seems to be my customer's state of mind?*
- m *What is my customer's dominant emotion?*
- m *What is the first response my customer needs from me?*

YOUR WORLD

Here's your chance to apply what you've learned to your situation. Just follow these easy steps, and jot down your answers to each question in the space below.

1. **Pick a typical type of customer service situation that you handle in your job.** However, if nothing comes to mind or if you're new on your job, you may use the situation in the box, which involves an encounter with an internal customer.

What is the situation? (Answer only if you pick your own situation.) What type of person is the customer? What kind of day is your customer apparently having?

Alternative Situation

You work for a newspaper as a graphic artist. A co-worker who sells advertising space wants to know when you'll have a new mock-up ready for one of her clients to see for a half-page ad that will run in the Sunday edition of the paper. The client is new, and could become a source of considerable revenue for the company if they get a good response from their ad. But you've been very busy lately, and had to do a rush job on the first mock-up your co-worker requested, and the client didn't like what they saw. You're still behind on your other deadlines, but your co-worker is insisting that you do the new mock-up right away, and that it has to be something special in order to please the advertiser.



2. Decide to be friendly.

How do you feel about dealing with this situation with your internal or external customer?

3. Treat your (internal or external) customer like you'd treat a visitor.

How will you help this customer to feel welcome and comfortable?

4. Meet your customer where they are, setting aside where you are.

Do you need to acknowledge your customer's apparent state of mind? How will you do that?

5. For the moment, make your customer's needs more important than anything else.

What are this person's needs?

6. Listen and watch for the meaning behind your customer's words.

What meaning might be conveyed by this customer's body language and tone of voice?

PRACTICE MAKES PERFECT

Practicing what you've learned is a good way to help you remember what you've learned. The best way to practice is to practice out loud.

- We suggest you use the situation you've just described and do a quick role-play, with you playing yourself, and a partner playing the customer.
- Ask your role-play partner to read the situation you wrote about in advance, so your partner will know what role to play.
- You may wish to talk to your partner about how you'd like her or him to play the role—do you want the "customer" to be agreeable or difficult? Relaxed or rushed? Choose a manner for your role-play partner that is true to what you think would happen in real life.

CHOOSE TO C.A.R.E.

CONNECTED

ATTENTIVE

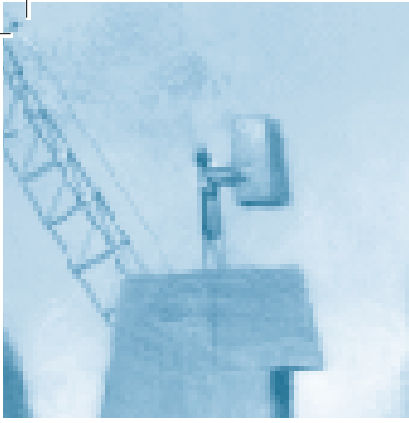
RESPONSIBLE

ENTHUSIASTIC

ACTION STEPS

- Decide to be friendly before you speak with your customer.
- Treat your customer like you'd treat a visitor.
- Meet your customers where they are, putting aside where you are.
- For the moment, make your customer's needs more important than anything else.
- Listen and watch for the meaning behind your customer's words.





Chapter 3: Be Attentive

YOU'RE THE ONE WHO IS TAKING C.A.R.E. OF BUSINESS

It probably comes as no surprise that you need to listen with your full attention in order to Be Attentive to your customers. But it's what being truly attentive leads to that is crucial when it comes to delivering remarkable customer service. When you are being truly attentive you'll simply understand your customer's situation more clearly, and that's what makes it possible for you to care for each of your customers, without any one of them feeling rushed.

You see, your customers want or need something specific from you; that's why they're there, so you can help them. But some customers may have trouble explaining themselves. Others may enjoy the social aspect of the contact with you, and want to take too much time getting to the business at hand. Being attentive gives you the means to manage the communication aspects of the customer contact. Remember, even though your customers come to you, you're still the one who's "taking C.A.R.E." of business. After all, you're the professional.

WHAT'S IN IT FOR YOU

In this chapter you'll learn to:

- Give your customer your full attention.
- Ask questions with an open mind.
- Make sure all your customers know they can count on you.
- Take care of each customer efficiently.
- Be clear with your customer, and keep checking in to make sure they know what you're doing for them and that they agree to the next step.

REAL COMMUNICATION NEEDS YOUR FULL ATTENTION

When you're talking to an attentive person, you may not stop to think how skilled a communicator the other person is, because conversations with them are likely to be clear and on track, so the communication seems natural and easy. You understand each other and your interaction is a success. More noticeable is when you're talking to a person who isn't attentive, because things just don't work out as well. Here's an example of how inattentive communication can lead to poor customer service.



MISSING THE POINT: UNSUCCESSFUL CUSTOMER CARE

Jim is a sales representative at a computer store where he and his fellow sales reps make their money on a commission basis. The more customers Jim sees, successfully sells to and gets out the door, the better his take-home pay. Mr. Robinson is a grandfather out of his element in a high-tech store, but determined to buy his grandson the sort of graduation present he will both like and find useful. As a one-time door-to-door sales rep, Mr. Robinson is from an older school of salesmanship in which long, personalized conversations were the way a salesperson got to know his or her customer, so he delights in providing sales reps who assist him with the benefit of his experience. Besides, he likes people and enjoys talking to them—a lot!

Jim Hi there, sir, what can I do for you?

Mr. Robinson Hello, my name is Matthew Robinson; and you are ...*(looking at Jim's name tag)* Jim?

Jim Jim, right; how can I help you, Mr. Robinson?

Mr. Robinson I'd like to find something for my grandson; he graduates high school next month, over at Merlo. It's one of those special schools, I'm sure you've heard about it. They take kids who are mostly interested in science and math. Why, I wouldn't be surprised if you went there yourself, Jim, what with your interest in working with computers and all.

Jim No, sir, I went to Jefferson, just a regular old high school.

(He looks beyond Mr. Robinson at a young customer who just entered the store, more his type of prospect.)

(Distractedly) Um, what kind of computer does your grandson own?

Mr. Robinson Well, it's one of those nice new ones; you know, it's got, I don't know, he tells me it's got all the bells and whistles. He's typing away on it all the time. Sometimes I worry that he spends too much time on the darn thing. My son's generation, now they watched too much television. My grandson says computers are different, cause he's doing something constructive—writing or researching projects on the, what do you call it, the Web?

Jim Yeah, the Internet. Hang on a sec.

(To the young customer) Hey, I'll be with you in just a minute.

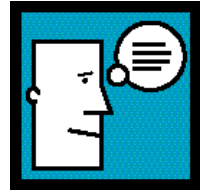
(Back to Mr. Robinson) Maybe you'd like to get him a game or something.

Mr. Robinson A game? I've never seen him use his computer for anything like that, I ...

Jim If he spends a lot of time on the computer, I'm sure he'll be interested in the latest games that are out.

Mr. Robinson Well, I guess I could take a look, but like I told you, my grandson is into science and math. In fact, he's going to college next year as a physics major.

Jim *(Looking past Mr. Robinson again at the younger prospective customer)* Look, I'm sure we've probably got some software that a guy like your grandson would like. Why don't you find out what he's into and stop back later, and I'll be glad to help you then, when you know more about what you want. I've got to help this guy over here ...



THINK ABOUT IT

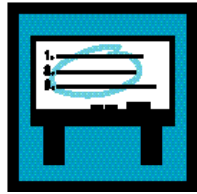
What would your reaction have been if you were Jim's customer in this situation?

What were some of the things that Jim did that you would not have liked if you were Jim's customer?

UNFORTUNATELY, INATTENTIVE SERVICE KEEPS ON GIVING

Failing to Be Attentive can have a ripple effect for your customer and your company long after the customer leaves. Jim didn't listen closely to what his customer told him about his need. Could he have discovered what sort of software was appropriate for Mr. Robinson's grandson had he listened more attentively? Did Jim leave the customer with the feeling that he really cared about him, or that he was more interested in moving on to another customer? Isn't it likely that Mr. Robinson will take his business to another computer store where a sales representative will give him his or her full attention?

Now that you've looked at what happens when a customer service rep isn't attentive, take a look at what happens when a CSR decides to Be Attentive. Notice that being attentive can actually shorten the length of a customer service situation, even with a customer who likes to chat.



HOW TO BE ATTENTIVE

Being attentive can give both you and your customer a big payoff. Things will go faster and smoother and you're likely to make fewer mistakes when you're an attentive customer service rep.

Give your customer your full attention. Focus on the customer and shut out any distractions—both mental distractions and those in your environment.

Ask questions with an open mind. Be careful to avoid assuming what the answer will be. This is a common mistake that leads to errors and frustration. (See "Using Open Minded Questions" on page 33.)

Make sure all your customers know they can count on you. Your customers may not always be clear about what they want or need. It's up to you to take the time to find out how you can really help them.

Take care of each customer efficiently. Never give your customer the impression that you're trying to get them off your plate as quickly as you can, just so you can move on to the next customer.

Be clear with your customer. Keep checking in to make sure things are clear to both you and your customer. Also, keep checking in to make sure your customer understands exactly what's going on, what you're doing for her or him and that your customer agrees to the steps you're proposing to take.

WHAT WORKED

Take a look at the successful example to see how Jim quickly helped Mr. Robinson when he chose to Be Attentive.

He gave his customer his full attention when he focused on understanding his need.

He asked questions with an open mind including, "How can I help you today?" as well as finding out what Mr. Robinson's grandson used his computer for. By asking these questions he avoided incorrectly assuming that Mr. Robinson needed entertainment software as a graduation gift for his studious grandson.

He made sure all his customers could count on him. Jim was a polite listener, and when another prospective customer came into the store, he asked Mr. Robinson's permission to momentarily speak with the new customer. He then returned to Mr. Robinson, fully focused on his needs. Now, both customers were being given good customer care.

He took care of each customer efficiently. Seeing that the young man was interested in the latest computers, he suggested he try one out while he finished with Mr. Robinson. Then he suggested a solution that probably will work for Mr. Robinson, and did so without making him feel rushed.

He was clear with his customer and kept checking in to make sure he knew what he was doing for him and that he agreed to the next step. He made sure that Mr. Robinson knew he understood what kind of software math and science high school students liked, and that he could buy a gift which could easily be exchanged if his grandson didn't want it.

USING OPEN MINDED QUESTIONS

After you've been on your job for awhile, you'll probably have seen similar customer situations many times, so you may begin to anticipate how your customers will answer questions. This causes some customer service reps to ask "leading questions." Leading questions are questions that, in some way, lead the customer to an answer. When you lead a customer to an answer you may get wrong or incomplete information. Communication is clearer and more efficient when you ask "open minded" questions. These are questions that don't suggest an answer. Here's an example of each type of question.

Open minded question: When do you need this?

Leading question: You probably need this right away, don't you?

GIVE IT A TRY

Mark whether each of the questions below is an Open Minded or Leading question. Write an "O" for Open Minded or an "L" for "Leading."

1. What would be a good solution for you? _____
2. Will this work for you? _____
3. That's been going on for a long time, hasn't it? _____
4. Would you like to see our technician on Wednesday or Thursday (when there are other choices available)? _____
5. It's worse than before, isn't it? _____
6. What can I do for you today? _____
7. This isn't too big of a problem, is it? _____
8. You don't have any more information, do you? _____
9. How well did that work for you? _____
10. Has this happened before? _____

Check your answers with the answer guide at the back of this book on page 76.

YOUR WORLD

Here's your chance to apply what you've learned to your situation. Just follow these easy steps, and jot down your answers to each question in the space below.

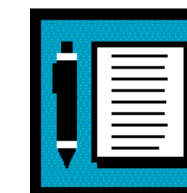
1. Pick a typical type of customer service situation that you handle.

This exercise will be most meaningful if you use a typical situation from your job. However, if nothing comes to mind or if you're new on your job, you may use the situation in the box.

What is the situation? (Answer only if you pick your own situation.) What type of person is the customer?

Alternative Situation

You work for a cellular telephone company. A customer wishes to return a defective cell phone that she purchased from your store. In fact, she has received defective phones twice after returning the original one. This customer is frustrated. Now she just wants a refund. She's unclear about your company's return procedures. The last time she returned the item she didn't bring the return slip and therefore had to make an extra trip to your store to get her account credited for the return. Now she's back wanting a refund, but again doesn't have the return slip. You need to ask her to return to the store yet again in order to refund her money.



2. Give the customer your full attention.

What can you do to prepare yourself to listen with your full attention?

3. Ask questions with an open mind.

What kind of Open Minded questions might you ask this customer?

4. Make sure all your customers know they can count on you.

What steps might you need to take to let each customer know you're there for them?

5. Take care of each customer efficiently.

What can you do to meet each customer's needs without making them feel rushed?

6. Be clear with your customers and keep checking in to make sure they know what you're doing for them and that they agree to the next step.

What are some of the things you might say to this customer to be clear?



PRACTICE MAKES PERFECT

Practicing what you've learned is a good way to help you remember what you've learned. The best way to practice is to practice out loud.

- We suggest you use the situation you've just described and do a quick role-play, with you playing yourself, and a partner playing the customer.
- Ask your role-play partner to read the situation you wrote about in advance, so your partner will know what role to play.
- You may wish to talk to your partner about how you'd like her or him to play the role—do you want the "customer" to be agreeable or difficult? Relaxed or rushed? Choose a manner for your role-play partner that is true to what you think would happen in real life.

CHOOSE TO C.A.R.E.

CONNECTED

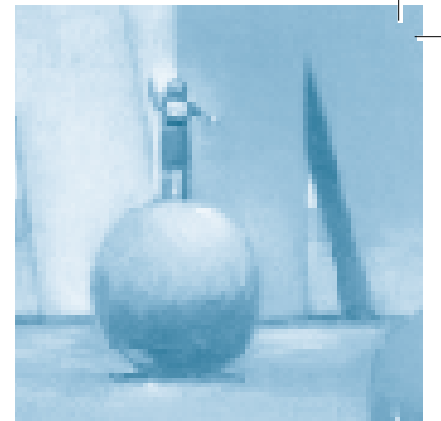
ATTENTIVE

RESPONSIBLE

ENTHUSIASTIC

ACTION STEPS

- Give your customer your full attention.
- Ask questions with an open mind.
- Make sure all your customers know they can count on you.
- Take care of each customer efficiently.
- Be clear with your customers, and check in to make sure they know what you're doing for them and that they agree to the next step.



Chapter 4: Be Responsible

TAKE OWNERSHIP

The essence of your job is helping customers. That's why customer service pros make the choice to take ownership of their customer service encounters, from beginning to end, no matter how challenging. Taking ownership means taking full responsibility for making sure that your customers get help, whether they've come to you to buy something, ask a question, solve a problem or even just complain.

REMEMBER TO BE ATTENTIVE

You can't take ownership of a customer service situation unless you fully understand it, and you can't understand a situation unless you're giving it your full attention. So a big part of being responsible has to do with following the lessons presented in Chapter 3 on being Attentive. And being attentive and responsible is especially important when you're dealing with dissatisfied customers.

DISSATISFIED CUSTOMERS

As you probably already know, your job isn't all smooth sailing. No doubt, things can get a little rough in the course of a typical day because from time to time you'll probably have to deal with dissatisfied customers. And when you do, it's important to remember that it's still your job to take care of business, and it's always your job to take full responsibility, even though you may not be responsible for your customer's dissatisfaction. But the good news about dissatisfied customers is that they generally aren't upset with you, they're actually upset with the situation. The key to dealing with angry, frustrated and upset customers is to avoid taking things personally. When you remember not to take things personally, it's easier to help your dissatisfied customers.

WHAT'S IN IT FOR YOU

In this chapter you'll learn to:

- Take ownership.
- Avoid taking things personally.
- Let dissatisfied customers vent.
- Apologize for the situation.
- Find solutions.
- Agree to next steps.
- Thank your customer.
- Do something extra to make up for the problem, whenever possible.

WHO'S RESPONSIBLE?

One reason it can be difficult to help dissatisfied customers is that they often confront you with problems that you didn't cause. It can be easy to feel that the people who caused the problem should also be the people to fix the problem. But since your job as a customer service rep is to care, you have to think of yourself as being the only person responsible for making sure every one of your customers gets all of the help they need.

Let's take a look at what happens when a CSR decides that taking care of someone else's mistake is not their job.

GETTING NOWHERE FAST: UNSUCCESSFUL CUSTOMER CARE



Tom is a businessman who travels frequently. As such, he should be accustomed to the problems associated with modern air travel. But it's the end of a very long week of cross-country flights, and he has missed a final connecting flight that would have gotten him home in time to see his son's Friday night football game. Although late arriving flights have caused him to miss connections in the past, this one happens when he's tired and frustrated, and he focuses all his anger against the airline on Rolanda Jackson, the ticket agent at the airline counter.

Rolanda Yes sir, can I help you?

Tom Not unless you've got another flight to Seattle in the next half-hour! I can't believe this; I've been flying all over the place with your airline all week long, and you pick today to screw me up.

Rolanda May I have your ticket please?

Tom I want to see my kid play in a football game that starts at 7:30. I mean, what does it take to keep to a schedule? You people never seem to be able to ...

Rolanda Well, the published flight schedule is only an estimate, sir. And we get slowed down by the control tower because of lots of air traffic on weekends. There's not much I can do about that, now is there, sir?

(She enters some information into her computer terminal, then frowns and shrugs her shoulders.)

We don't have another flight to Seattle till 11 o'clock tonight.

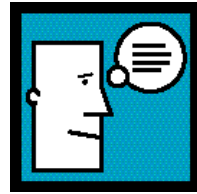
Tom It's the championship game. I have got to get there!

Rolanda 11 p.m. is the best I can do.

Tom Isn't there any other way I can get there?

Rolanda *(Ignoring his inquiry)* Would you like me to book you on the 11 o'clock flight or not sir?

Tom I guess. I don't seem to have any other choices. But your corporate office is going to hear from me about this! I swear, this is the last time I'll fly with you people!



THINK ABOUT IT

What would your reaction have been if you were Rolanda's customer in this situation?

What were some of the things that Rolanda did that you would not have liked if you were her customer?

Now that you've looked at what happens when a customer service rep doesn't take ownership of the situation at hand, take a look at what happens when a CSR decides to Be Responsible.



BLUE SKIES, GREEN LIGHTS: SUCCESSFUL CUSTOMER CARE

Rolanda Yes sir, can I help you?

Tom Not unless you've got another flight to Seattle in the next half-hour! I can't believe this; I've been flying all over the place with your airline all week long, and you pick today to screw me up.

Rolanda I can understand your frustration. Let me see what I can do. Could I see your ticket please?

Tom I want to see my kid play in a football game that starts at 7:30. I mean, what does it take to keep to a schedule? You people never seem to be able to get from one place to another at the time you say you will.

Rolanda I'm sorry your flight here was delayed. Let me check availability on our remaining flights tonight.

(She enters some information into her computer terminal, then looks up with an expression of genuine concern and shrugs her shoulders.)

Unfortunately, we don't have another flight to Seattle till 11 o'clock tonight.

Tom It's the championship game. I have got to get there!

Rolanda Well, Sunset Air has a flight that leaves in 45 minutes. That would get you into Seattle just a bit later than your original flight with us.

Tom Yeah, well, what about my ticket?

Rolanda I don't think Sunset will honor our ticket. But you can hang on to it and apply it to another one of our flights when you travel again.

Tom Hmmm, well I sure don't want to have to buy another ticket, but if it would get me there at a reasonable time tonight ...

Rolanda I'll call over to their ticket counter and see what we can do. How's that sound?

Tom A lot better than waiting till 11 p.m.

Rolanda *(She picks up her phone)*

Jill? Rolanda at Hub Air. Do you have anything available on your 5:45 to Seattle? Good, yeah, hold that for me, will you. I'm sending a customer over to you right away. His name is Tom Stephens.

(She hangs up)

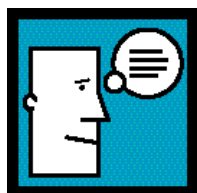
There's one seat left, but they're holding it for you.

Tom I suppose that's better than nothing.

Rolanda Well, we really do appreciate your business. Just call us tomorrow, and we'll get the back end of your ticket applied to your next flight out of Seattle. Oh, and here's a certificate for a headset rental, so you can watch a free movie on your next flight with us.

Tom Oh ... well, thanks; that's great. And thanks for your help.

Rolanda And thank you for your patience. Have a great trip!



THINK ABOUT IT

In this situation, Rolanda did several things that helped make the encounter with her customer work better. What were some of the things you would have appreciated if you were Rolanda's customer in this situation?

HOW TO BE RESPONSIBLE

You can make a positive difference when you choose to Be Responsible for making sure your customers get help. What's more, when you choose to Be Responsible, your customers will often be easier to help. You see, they're likely to sense your commitment to helping and be more confident they'll get what they need.

Take ownership. Take full responsibility for making sure your customers get help, even when it's a tough situation.

Don't take things personally. It may sound like your dissatisfied customers are mad at you, but they're not. They're mad about the situation.

Let dissatisfied customers vent without interrupting. In other words, listen; let them talk it out. It helps lower their emotional level.

Apologize for the situation. Some people don't like to apologize for problems or mistakes that aren't their fault, and you don't have to. Instead, you can apologize for the situation. Say, "I'm sorry this didn't work out for you."

Find a solution. You may not always have the authority to offer a complete solution to your customer, but you always have permission to let your customer know that they're getting the best care you and your company can offer.

Agree to next steps. Be clear about what you're planning to do for your customers and make sure they agree.

Thank the customer. There's always a reason to thank your customer. At the very least, you can thank your customer for their observations.

Do something extra to make up for the problem, whenever possible. However, stay within the limits of your organization's policies and procedures. When you make up for an unsatisfactory situation your customers are likely to feel more satisfied.

WHAT WORKED

Take a look at the successful example to see how Rolanda helped Tom when she chose to Be Responsible.

She took ownership rather than just telling Tom that a delayed flight wasn't her fault or the fault of the airline. What's more, she took responsibility for helping Tom when she suggested an alternative flight on another airline, while reminding him that the cost of his existing ticket could be applied to a future flight.

She didn't take his unhappy comments personally. She didn't simply stop trying to help Tom when she was confronted with his anger and frustration.

She let him have his say without interrupting.

She apologized for the flight delay, even though she didn't cause it.

She offered a solution by referring him to a different airline that could provide him with a flight which served his particular needs.

She was clear about Tom's alternatives.

She thanked him for his business.

She did something extra to make up for the problem when she offered to help him get a seat on a flight offered by another airline, as well as giving him a headset certificate so he could watch a free movie on his next flight with her airline.

FINDING THE S.O.L.U.T.I.O.N. FOR YOUR CUSTOMERS

Being unable to grant your customer's request doesn't mean you can't help your customer. Consider all possible solutions, then offer the best options to your customer. When it's tough to think of options, use the letters in the word SOLUTION to help you brainstorm.

- | | |
|---|--|
| S — Say yes. | "We can do that." |
| O — Offer ideas. | "How about ..." |
| L — Later, but still "yes." | "We can get that to you by next Friday." |
| U — Understand your customers. | "So this has happened to you twice now." |
| T — Teach customers to help themselves. | "You can find quick answers on our Web site." |
| I — Include them in your search for solutions. | "What would you suggest?" |
| O — Offer outside help. | "I'll bet you could get help in a book called ..." |
| N — Neutral response: Just listen attentively. | "I see." |

Think of a customer request you are unable to grant and make brief notes about the request below. If you can't think of a request from one of your customers, use the Alternative Situation on the next page.

What is the request? (Answer only if you pick your own customer request.)

Alternative Situation

You are a customer service representative behind a busy car rental counter at a large international airport. One of your customers has just arrived late after a particularly grueling journey (he missed a connection and is running late for an important business meeting as a result). Your customer had reserved a mid-size four-door auto, but because he is so late and didn't make prior arrangements to have the car held for him, there are no four-door mid-size vehicles left to rent to him. There are two-door mid-size cars available, but your customer wants you to upgrade him to a luxury automobile. However, every car in that class is reserved for other customers yet to arrive. Your customer refuses to leave until you give him one of these larger vehicles, which he can clearly see sitting on your lot outside the rental office windows.

Use the letters in the word SOLUTION to help you brainstorm options to offer your customer.

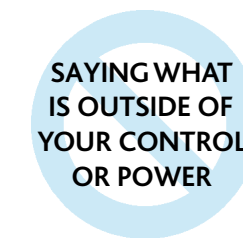
- S** — Say yes. _____
- O** — Offer ideas. _____
- L** — Later, but still "yes." _____
- U** — Understand your customers. _____
- T** — Teach customers to help themselves. _____
- I** — Include them in your search for solutions. _____
- O** — Offer outside help. _____
- N** — Neutral response: Just listen attentively. _____

DON'T MAKE THE SHIFT

Part of choosing to Be Responsible is avoiding the common bad habit of shifting responsibility or blame to other people or circumstances. Actively look for solutions and avoid:



MAKING EXCUSES

BLAMING—
ANYBODY, EVEN
IF IT IS THEIR
FAULTSAYING WHAT
IS OUTSIDE OF
YOUR CONTROL
OR POWER**YOUR WORLD**

Here's your chance to apply what you've learned to your situation. Just follow these easy steps, and jot down your answers to each question in the space below.

- 1. Pick a typical type of customer service situation that you handle** where your customer is at least somewhat dissatisfied. This exercise will be most meaningful if you use a typical situation from your job. However, if nothing comes to mind or if you're new on your job, you may use the situation in the box on the next page.

What is the situation? (Answer only if you pick your own situation.) What type of person is your customer?



Alternative Situation

You are a teller at a large bank. An angry customer confronts you about a problem she is having with one of her accounts. Although she has a receipt which verifies that she made a deposit from one of her accounts within the bank to another in the same bank the day before, the deposit was not credited. She has already been informed by Customer Service that the missing deposit must be researched in order to discover where the deposit was mistakenly routed. Until then, despite the fact that she has a receipt, the deposit cannot be credited to her account. You must confirm this delay for her, as well as letting her know that the delay could take several days, perhaps even longer. The customer is demanding that she have immediate access to her money, and threatens to move her accounts to another bank if this doesn't happen immediately.

2. Take ownership.

What are some of the ways you will take ownership of the customer service situation?

3. Don't take it personally. Let dissatisfied customers have their say without interrupting. Apologize for the situation.

How will you apologize for the situation?

4. Find a solution.

If you can't provide the exact, ideal solution your customer is looking for, what will you suggest instead?

5. Agree to next steps.*What next steps will you suggest?*

6. Thank the customer.*How will you thank your customer?*

7. Do something extra to make up for the problem, whenever possible.*Is there something extra you can do for your customer? If so, what is it?*

PRACTICE MAKES PERFECT

Practicing what you've learned is a good way to help you remember what you've learned. The best way to practice is to practice out loud.

- We suggest you use the situation you've just described and do a quick role-play, with you playing yourself, and a partner playing the customer.
- Ask your role-play partner to read the situation you wrote about in advance, so your partner will know what role to play.
- You may wish to talk to your partner about how you'd like her or him to play the role—do you want the "customer" to be agreeable or difficult? Relaxed or rushed? Choose a manner for your role-play partner that is true to what you think would happen in real life.

**CHOOSE TO C.A.R.E.****C**ONNECTED**A**TTENTIVE**R**ESPONSIBLE**E**NTHUSIASTIC**ACTION STEPS**

- Take ownership of the customer service situation.
- Don't take it personally.
- Let dissatisfied customers vent.
- Apologize for the situation.
- Find a solution.
- Agree to next steps.
- Thank your customers.
- Do something extra to make up for the problem, whenever possible.

Chapter 5: Be Enthusiastic

If you're like most customer service reps, you help quite a few people every day. Because each customer deserves to be treated as if he or she were your only customer, it's important to choose to Be Enthusiastic with every customer, every hour you're on the job. The fact is, when you fail to Be Enthusiastic, customer service encounters that might have been easy can easily end up being more work than they needed to be.

Don't misunderstand: being enthusiastic doesn't mean being a cheerleader all day long; it simply means doing all you can to give all your customers the remarkable service they expect and deserve.

WHAT'S IN IT FOR YOU

In this chapter you'll learn to:

- Constantly check your attitude.
- Treat every customer as if he or she were your only customer.

WHEN THE GOING GETS TOUGH ...

You probably already know that there are at least a hundred things that can get in the way of starting your next customer service encounter with the right attitude. But don't let things like the number of customers you serve each day or the fact that some of them may have been tough to handle stop you from doing your job well. Here's what can happen when a CSR lets the pressures of the job get in the way.

GET IT OFF MY PLATE: UNSUCCESSFUL CUSTOMER CARE



Nusara Miyake works in the Customer Service Department of a home electronics store. One of her primary job responsibilities is handling merchandise returns. It's Friday evening, and Nusara is nearing the end of a long workday during which she has dealt with a large volume of customers, all of whom (as usual) had complaints about the items they were returning for either an exchange or a refund. She is about to "punch out" for the day, leaving just one other Customer Service rep on duty, her co-worker, Jeff. Just as she is about to leave, she sees an unhappy looking customer coming toward the counter with a VCR under his arm. The customer heads right toward her, plus Nusara sees that Jeff is currently helping another customer so, despite her strong desire to leave at the end of her shift, she reluctantly waits on the customer, Bill.

Nusara Hi, what can I do for you?

Bill I have tried every which way to Sunday to get the timer to work on this thing, and it just isn't happening. I want to exchange it.

Nusara *(Thinking to herself: Another consumer who can't figure out how to operate a VCR. Why do I always get these guys?)* Did you read the instructions carefully? That's usually the problem—not following the instructions.

Bill I'm not stupid; I followed the instructions.

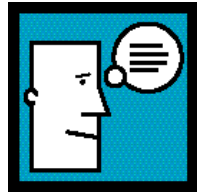
Nusara I can't tell you the number of times I get customers in here looking for an exchange, when all they needed to do was take out the manual and do exactly like it says.

Bill *(Thinking to himself: Why can't she take my word for it? The machine is defective, but she just isn't listening to me.)* I read the manual, more than once. I did what it said to do, step by step, more than once. This VCR isn't working right. I want to exchange it for another one.

Nusara Yeah, okay, sure, but I tell you what: I was just about to leave for the day. If you can hang on a second, Jeff over here can help you out.

Bill You mean I've got to go through all this again with him!?

Nusara It won't take that long. I was on my way out the door; sorry. I'm sure he'll get to you in just a couple of minutes.



THINK ABOUT IT

What would your reaction have been if you were Nusara's customer in this situation?

What were some of the things that Nusara did that you would not have liked if you were her customer?

Now that you've looked at what happens when a customer service rep isn't enthusiastic, take a look at what happens when a CSR decides to Be Enthusiastic.



CHOOSING TO C.A.R.E., AGAIN: SUCCESSFUL CUSTOMER CARE

As Bill walks toward the counter, Nusara checks her attitude. She realizes she resents having to deal with another customer so close to the end of her shift. Then she reminds herself of the efforts she and her co-workers put into meeting the needs of their customers and decides it's important to provide service to one last customer before going home, and to do it with a helpful attitude.

Nusara Hi, what can I do for you?

Bill I have tried every which way to Sunday to get the timer to work on this thing, and it just isn't happening. I want to exchange it.

Nusara Sometimes these things are tricky if you don't go exactly by the instructions. Are you sure you followed what it said to do in the manual?

Bill Positive. I read the manual a couple of times, and tried to do what it says several times. I'm certain there's a manufacturing defect involved here.

Nusara You're probably right. Let me get you a replacement unit and get you on your way.

Bill Just like that?

Nusara Just like that. It'll take me a minute to find the unit back in inventory. Can you hang on a second?

Bill Hey, you bet. I appreciate your help.

Nusara No problem. That's what we're here for!



THINK ABOUT IT

If you were in this situation, what are some of the things you might have done to help yourself to Be Enthusiastic?

Handwriting lines for reflection.

HOW TO BE ENTHUSIASTIC

Both you and your customer benefit when you decide to Be Enthusiastic. Nobody likes to be involved in a customer service situation where either party has a bad attitude. You can't control the attitude of your customer, but even though it's not always easy, you can control your own attitude.

- Constantly check your attitude so you handle each customer professionally and with a helpful attitude.
- Treat every customer as if they were your only customer. When you do, you'll give the kind of service you'd want to get if you were the customer.

ENTHUSIASM GENERATORS

Because it's not easy to Be Enthusiastic with every customer, it's useful to build enthusiasm by looking at the next customer service situation from a new point of view. When your enthusiasm is low, approach the next customer in the following ways.

- With interest—What will this customer have to say?
- With empathy—I know this person needs my help.
- As a challenge—Let me see how well I can help this customer.
- As an opportunity to do the right thing—I'd want to deal with someone who had a helpful attitude if I were the customer.

WHAT WORKED

Take a look at the successful example to see how Nusara decided to Be Enthusiastic before she spoke with the customer.

- She checked her attitude, recognizing that she was about to be resentful because a customer wanted help at the end of her busy work day, then deciding to do the right thing by providing service to this last customer of the day with a helpful attitude.
- She treated her customer as if he were her only customer, even though she had helped many other people with this same problem.



YOUR WORLD

Here's your chance to apply what you've learned to your situation. Just follow these easy steps, and jot down your answers to each question in the space below.

1. **Make a list of typical situations** that cause you to lose your enthusiasm for helping customers. This exercise will be most meaningful if you think of typical situations from your job. However, if nothing comes to mind or if you're new on your job, you may use the situations in the box on the next page.

What are the situations? (Answer only if you pick your own situations.)

Alternative Situations

- When you feel you are handling more customers than a co-worker so you're carrying more of the work load
- After you encounter critical customers
- After you encounter customers who are hard to satisfy
- When you have to solve tough problems that aren't your fault
- When you are in the final minutes of your last day of your work week

What will you do to be sure you treat these customers as if they were your only customers?

CHOOSE TO C.A.R.E.

CONNECTED

ATTENTIVE

RESPONSIBLE

ENTHUSIASTIC

ACTION STEPS

- Constantly check your attitude.
- Treat every customer as if they were your only customer.

Chapter 6: Be a Service Pro

Stress just seems to be part of the job when you're a customer service rep. That's why service professionals watch for times when they're getting too stressed-out to either feel good about their jobs or to help their customers.

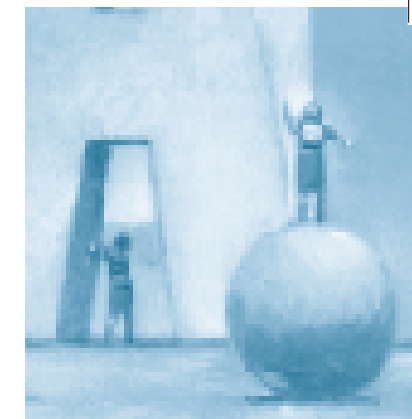
PUT ON YOUR OWN OXYGEN MASK FIRST

If you've traveled on an airline, you've no doubt heard the announcement that "in the case of loss of cabin pressure, oxygen masks will drop from the ceiling," and that "if you're traveling with someone who needs help, put on your own mask first." That's because you can't help someone else when you're unable to function yourself. The same is true with customers: You can't help them when you're too stressed-out to be Connected, Attentive, Responsible and Enthusiastic.

WHAT'S IN IT FOR YOU

In this chapter you'll learn to:

- Choose to take action to reduce your stress.
- Know which stress-management tools work best for you.



STRESS TEST

	yes	no
1. Do you find yourself being impatient with customers or co-workers when you'd like to have more patience instead?	m	m
2. Do parts of your body, such as your shoulders or neck, feel tense or even hurt at work?	m	m
3. Do you find it hard to stop thinking about work after you leave for the day?	m	m
4. Do you get sick often?	m	m
5. Does contact with difficult customers regularly upset you?	m	m
6. Do you regularly find yourself rushing at work?	m	m
7. Do you juggle several things at once on your job?	m	m
8. Do small problems bother you more than you would like?	m	m
9. Are you regularly late for work and other events?	m	m
10. Do you regularly cut your breaks short to take care of work?	m	m

This isn't a scientific test, so we're not suggesting which scores indicate low or high stress levels. But take a look at your answers and decide for yourself how much stress you feel at work.

HOW TO MANAGE THE STRESS OF YOUR SERVICE JOB

Choose to take action to reduce your stress. A popular image of contemporary culture is that of stressed-out people with seemingly little or no ability to step out of the rat race. But the fact is, we can take control of the stress of the world we live in. But to do that, you first have to tune in to your stressed-out feelings, and then choose to do something about them.

Ten ways to manage the stress of your service job

- 1. Take a one-minute vacation**—Imagine yourself in your favorite vacation spot. Better yet, imagine your ultimate vacation. This one's free! What's best about this free vacation is that your mind won't distinguish between your actually being there and the vivid mental images of being there, and your body will get the same calming feelings as if you were actually there.
- 2. Breathe**—Take relaxed moderate breaths. It's nearly impossible to feel stressed while you're doing this exercise.
- 3. Talk or think positively about what you just learned**—You're likely to feel better about a stressful situation if you feel you gained something useful from the experience.
- 4. Walk (or do other exercise)**—Exercise—even around the office—is a proven stress releaser.
- 5. Be concerned, not worried**—Concern is the process of recognizing a problem and taking whatever action is within your power, then moving on. Worry is the process of going over the situation time and time again in your mind. The problem is worrying doesn't change anything.
- 6. Organize**—This may help you feel more in control.
- 7. Take a health break**—Get away from your desk and do something unrelated to your job for a few minutes, when possible.

8. Laugh at the situation—Laughter is one of the best ways to release stress.

9. Identify a change (small or large) that will alleviate the situation—This is another way to help you feel more in control. It may also help you to believe that the future will be better. For example, you might develop a list of phone numbers that will help you get information more easily in similar situations, or you might have a conversation with a co-worker about a problem.

10. Do something that uses your creativity—It's hard to feel stress when the creative part of you is active. For example, you might think about fun things to do on your day off or brainstorm creative ways to celebrate a co-worker's birthday or new baby.

YOUR WORLD

Here's your chance to decide how you'll handle stress on your job. Just follow these easy steps and jot down your answers to each question in the space below.

1. Make a list of typical situations that cause you to feel stressed at work. This exercise will be most meaningful if you think of typical situations from your job. However, if nothing comes to mind, or if you're new on your job, you may use one of the situations in the box.

What is the situation? (Answer only if you pick your own situation.)

Alternative Situations

- When you know there are several customers waiting to be helped
- After you have met a customer you weren't able to satisfy
- When you have worked overtime
- When problems at work are hard to handle



*Which of the ten ways to handle stress will be helpful for you in each situation?
Feel free to include your own methods for handling stress on the job.*

ACTION STEPS

- Choose to take action to reduce your stress.
- Know which stress-management tools work best for you.

Help For Facilitators and Trainers

USING THE WORKBOOK WITH A GROUP

Assign a person to organize the training and to facilitate each session. The person should have basic facilitation skills and a good understanding of the material.

Determine the number of participants. An acceptable number of people in a learning group ranges from two to ten. However, a facilitator with a great deal of experience may be able to work successfully with groups of up to 16 learners.

Notify participants about the time and location of the session and any work they are expected to do before the session.

Write an agenda for each session.



SESSION AGENDAS

Chapter 1

- Course overview
- Information about mental messages
- Your choices of mental messages
- Action steps
- Next session

Chapters 2 through 5

- Last session's information
- Information about (insert topic from the chapter you are covering)
- Unsuccessful example
- Successful example
- How to (insert topic from the chapter you are covering)
- Practice
- Action steps
- Next session

Chapter 6

- Last session's information
- Stress test
- Information about reducing stress
- Your choices for reducing stress
- Action steps
- What you've learned during this course

DETAILED FACILITATION PLAN

This plan lays out a total of approximately 8 hours of training time. You'll find options for adjusting the length of the training following this section.

Chapter 1

35 minutes total

Introduction

15 minutes

- Give an overview of the course.
- Explain the reason this learning group has been formed.
- Review the agenda for today.
- Ask participants to read the first two pages in the chapter.
- Ask a participant to summarize the main points.
- Direct the participants' attention to any points that have been missed.

How to CARE

15 minutes

- Ask participants to answer the questions in the workbook about mental messages.
- Ask the group to discuss how they will apply this information to their situations.

Wrap-up

5 minutes

- Ask a participant to review the action steps from this session.
- Confirm the meeting time and location for the next session.

Chapters 2 through 5

90 minutes total (per chapter session)

Introduction

10 minutes

- Review the agenda for today.
- Ask participants to discuss how they have been using the information they learned in the last session.
- Ask participants to read the first page in the chapter and the page titled "What's In It For You."
- Ask participants if they have any questions or comments.

Unsuccessful Customer Care 20 minutes

- Ask participants to read the Unsuccessful Customer Care example and to answer the "Think About It" questions in the workbook.
- Ask participants to share their answers to the "Think About It" questions for the unsuccessful customer care situation.
- Ask the group to discuss similar situations and experiences from their own work lives.

Successful Customer Care 15 minutes

- Ask participants to read the Successful Customer Care example and to answer the "Think About It" questions in the workbook.
- Ask participants to share their answers to the "Think About It" questions for the successful customer care situation.
- Ask the group to discuss similar situations and experiences from their own work lives.

"How to ..." Section 20 minutes

- Ask participants to read the "How to ..." and "What Worked" sections for this chapter.
- Ask a participant to summarize the main points in the "How to ..." and "What Worked" sections.
- Ask other participants to add to what the first participant said.
- Direct the group's attention to any points that have been missed.
- Ask participants to do the writing activity (in chapters 3 and 4 only).
- Ask participants to discuss their responses (in chapters 3 and 4 only).
- Ask participants how they will apply this information to their situations.

Practice Makes Perfect 20 minutes

- Ask participants to pair up to practice situations from their world.
- Move among groups to observe how participants use the skills.
- Bring the group back together to discuss what they've noticed and learned while practicing.
- Add comments about what you observed during the role play.

Wrap-up 5 minutes

- Ask a participant to review the chapter's "Action Steps."
- Confirm the meeting time and location for the next session.

Chapter 6**45 minutes total****Introduction 15 minutes**

- Review the agenda for today.
- Ask participants to discuss how they have been using the information they learned in the last session.
- Ask participants about the level of stress they experience on their jobs.
- Ask participants to read the introductory comments about stress and to take the stress test. (Let them know, in advance, that you won't ask them to share their answers.)

How to manage stress 20 minutes

- Ask participants to read about what they'll learn in this chapter and about how to manage stress.
- Ask if there are any questions or comments.
- Ask participants to answer the questions in their workbook about reducing stress.
- Ask participants to discuss how they will apply this information to their situations.

Wrap-up 10 minutes

- Ask a participant to review the action steps for this chapter.
- Ask participants to discuss what they learned during this course and how they feel the information applies to them and their jobs.

USING THE VIDEO WITH THE WORKBOOK

Viewing the "Taking C.A.R.E. of Business" video with the workbook will enhance the effectiveness of the training. No doubt, participants will enjoy the exciting visual presentation, humor, and motivational message this video offers.

If you use the video, watch it before you use the workbook, section by section while you use the workbook, and then again after you've finished the workbook. Add 30 minutes to the length of the first and last sessions, and 15 minutes to the length of the other sessions. Follow the video with a discussion of what participants learned from it and how they feel the information applies to them and their jobs.

ADJUSTING THE LENGTH OF YOUR TRAINING

While the Detailed Facilitation Plan has been carefully designed to give participants the best possible opportunity to learn how to give remarkable customer service, we realize that in some situations time constraints may make it impossible to use all elements of the plan. This shortened plan allows you to use the workbook and video under those circumstances. The total training time with the video is about 4 hours (when you show the video only at the beginning of the section) and about 3.5 hours without the video.

Chapters 1 and 6 20 minutes per chapter

- Ask participants to read the entire chapter.
- Ask participants to write answers to the questions.
- Ask participants to discuss their answers to the questions.

Chapters 2 through 5 40 minutes per chapter

- Ask participants to read the entire chapter.
- Ask participants to write answers to questions in the "Your World" section.
- Ask participants to complete the "Practice Makes Perfect" activity described in the "Your World" section.
- Ask participants to discuss what they learned and how they feel the information applies to them and their jobs.

FACILITATION TIPS

Effective facilitation is essential for successful group learning. Effective facilitation means helping participants to be clear about the organization of the session and about what's expected of them. However, successful facilitation does not mean having all of the answers. Participants also have valuable answers, opinions and ideas to contribute. Here are some suggestions to help you facilitate smooth and effective learning sessions.

- Arrive early.
- Manage the room so it is clean, comfortable, appropriately lit and quiet.
- If possible, set chairs around a long or horseshoe-shaped table so participants can see each other's faces and the front of the room.
- Start and end on time. This is an important way to show respect for the participants.
- Give simple and clear instructions.
- Keep the conversation on the topic. If the discussion wanders, politely but firmly draw it back to the agenda.
- Encourage discussion by asking open-ended questions rather than questions that have right or wrong answers or a simple "yes" or "no" answer.
- Respect all opinions.
- Manage participants who dominate the conversation by calling on others to contribute.
- Ask for input from participants who are silent.

ANSWER GUIDE FOR QUESTION TYPES

(see "Using Open Minded Questions" quiz, page 34)

Question	Type
1. What would be a good solution for you?	Open minded
2. Will this work for you?	Open minded
3. That's been going on for a long time, hasn't it?	Leading. The question suggests that it's been going on for a long time. An open minded question would be, "How long has that been going on?"
4. Would you like to see our technician on Wednesday or Thursday (when there are other choices available)?	Leading. The question leads the customer to choose Wednesday or Thursday when a different day may be preferred. An open minded question would be, "When would you like to see our technician?"
5. It's worse than before, isn't it?	Leading. The question suggests that it's worse than before. An open minded question would be, "How is it compared to before?"
6. What can I do for you today?	Open minded
7. This isn't too big of a problem, is it?	Leading. The question suggests that the problem isn't too big. An open minded question would be, "Is this a significant problem?"

8. You don't have any more information, do you?

Leading. The question suggests that the customer doesn't have any more information. An open minded question would be, "Do you have any more information?"

9. How well did that work for you?

Leading. The question suggests that it worked; the only question is "how well." An open minded question would be, "Is that working for you?"

10. Has this happened before?

Open minded

NOTES
