



CUSTOMER SERVICE MANAGER CERTIFICATE

## **CUSTOMER SERVICE MANAGER CERTIFICATE (CSMC)**

### **STUDY GUIDE**

Sponsored by:



**Business Training Institute**

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Please use this guide to assist in preparation for your Customer Service Manager Certificate (CSMC) exam.

The contents of this study guide are as follows:

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## 1. **BUSINESS TRAINING:**

**The Business Training Institute** is the leading online program for specialized niche business certification programs. The team behind The Business Training Institute is comprised of industry experts in niches including online marketing, project management, public relations, consulting, and many more.

This experience, combined with our advisory board's expertise in online education and training, is what makes it possible to provide the training and certification programs found on our website.

The Business Training Institute is a global training and certification organization that has provided practical industry-specific certification to over 15,000 clients from the United States, Europe, and more than 75 other countries around the world.

We provide high value training programs that provide function knowledge on very specific business topics such as public relations, online marketing, project management, international business, and consulting.

**The Business Training Institute's Mission:** To provide professionals with high impact business training and certifications in niche subject areas that are functional and immediately beneficial.

**The Business Training Institute** helps you to:

- Quickly gain specialized knowledge in highly valuable business niches.
- Enhance your credibility, resume, and overall value in the marketplace.
- Complete our training programs in a few months from anywhere in the world.

Our programs accept participants year-round and are flexible to work with your current work schedule and academic constraints. You can complete one of our programs in 2 months or 2 years; the choice is yours.

**MASTER'S CERTIFICATE PROGRAMS:** The Business Training Institute is proud to offer several advanced Master's Certificates that require the completion of five programs from the Business Training Institute platform.

To learn more about these Master's Certificates and how to earn one, please see our website: [BusinessTraining.com/Masters-Certificate/](http://BusinessTraining.com/Masters-Certificate/)

## 2. **CSMC DETAILS AND TIMELINE:**

### **PROGRAM DETAILS:**

The **Customer Service Manager Certificate (CSMC)** certification program is unique in that it is modeled after many online courses offered at Ivy League institutions today, offering more value for a cost-effective program. The CSMC Program is a self-study program that includes educational multimedia resources in video form, a study guide, required readings, and a flexible online examination process, accessible around the world.

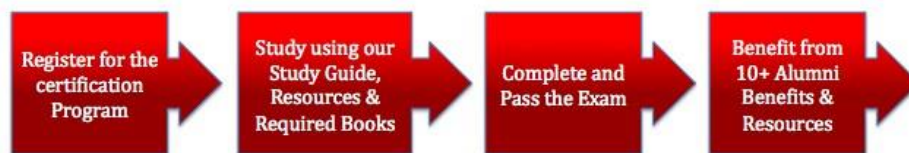
The online exam is structured so that to complete the exam within the 2-hour time frame one must read through all the assigned materials and conceptually understand the material to score well enough to pass the exam.

Our goal is to offer the most challenging program in the industry while also providing all the learning tools possible to ensure participants get the most out of the experience. By testing the knowledge depth and comprehension from the materials digested, the CSMC certification prepares individuals for successful, real-world application.

The Customer Service Manager Certificate (CSMC) program is sponsored and offered by The Business Training Institute. This certification program is designed to show and certify that you have gained an in-depth understanding and high-level, specialized knowledge.

In addition to the benefits of gained knowledge, growing industry recognition, more knowledgeable career choices, and our organization is also developing additional resources for CSMC Participants. This includes video and MP3 recordings on Q&A or strategies and tactics, webinars, access to interviews with internet marketing professionals who have more than 10 years of experience in the industry, among many more benefits.

#### 4 STEP CERTIFICATION PROCESS



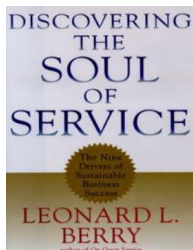
#### The experts interviewed for this customer service certification include:



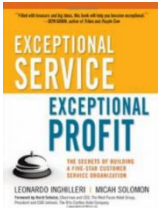
**Mark Hunter:** Mark Hunter has over 25 years of experience in customer service, marketing, and sales. He now acts as a sales consultant helping his clients find and retain valuable customers. He works with small 5-10 person companies as well as Fortune 500 multi-billion dollar corporations so he knows what leads to a valuable combination of sales and customer services.



**Marilyn Suttle & Lori Joe Beth:** Marilyn and Lori are experts in customer service and customer loyalty training, management, and improvement. Their combined experiences include providing customer service management training to 100's of clients, performing customer service themselves for over 10 years, and helping other improve their customer retention and growth strategies as well.



**Leonard** is a customer service expert and author of *Discovering the Soul of Service*. In this expert audio interview, he shares over a dozen insights and lessons on how to improve your firm's customer service starting today.



Leonardo Inghilleri: Leonardo is the President of Inghilleri Consulting Group; he is a keynote speaker on customer service and organizational effectiveness. His firm provides consulting services to help his business clients get better results from their investment in their staff. Leonardo is the author of Exceptional Service Exceptional Profit which is pictured to the left here and he shares many insights from this publication in audio format during this recorded phone call.

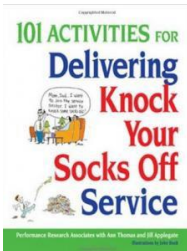


Jens Moeller: Jens is a consultant, author, speaker and founder of Jens Moeller Consulting. Jens helps clients retain more customers through improving their customer service and business cultures internally.



John Julius: John is a bestselling author, consultant, and speaker on customer service. John runs two companies; the first is a chain of salons and spas which has grown to be a top 20 chain in the United States. He also runs a customer service speaking, writing, and

consulting business, one of his books is called Customer Service Revolution and he shares valuable best practices within this expert audio interview



Ann Thomas: Ann is a consultant and author; she has over 20 years of customer service experience. Ann consultants with organizations to help them focus on service and improving the customer experience. One of her books, featured here on the left is 101 Activities for Delivering Knock Your Socks Off Customer Service and in this expert audio interview she shares a lifetime worth of wisdom on improving your

company's customer service.

#### **CUSTOMER SERVICE MANAGER CERTIFICATE VIDEO MODULES:**

1. Brand Loyalty
2. Customer Service Rapport Building
3. How to Manage Customer Service Departments & Professionals?
4. Customer Service = Public Relations
5. Turning Customer Service Work into a Marketing Asset
6. Leveraging the Power of Liking in Customer Service
7. Leveraging the Power of Social Proof in Customer Service
8. Leveraging the Power of Commitment in Customer Service
9. Leveraging the Power of Reciprocation in Customer Service
10. Leveraging the Power of Authority in Customer Service
11. Leveraging the Power of Liking in Customer Service
12. Leveraging the Power of Authority in Customer Service
13. Simulating the Mastermind for Customer Service Management
14. How to Get a Customer Service Internship?
15. Effective Communication

16. Solving Problems
17. The Customer
18. Customer Loyalty
19. Marketing Your Business
20. Mindshare 101
21. Voice Tone & Pace Tips for Customer Service
22. Word of Mouth: Definition & Overview
23. Communication Techniques
24. Using Body Language in Customer Service
25. How to Read Body Language to Improve Your Customer Service Skills
26. Phone Based Customer Service Tips
27. Customer Service Employee Empowerment Tips
28. Dealing With Difficult Customers
29. Turning Satisfied Customers Into Loyal Customers
30. Customer Service Tools
31. Customer Service Mistakes
32. Customer Loyalty 101
33. Customer Service as a Sales Vehicle
34. Customer Service Motivators
35. Customer Service Call Center Trends
36. Call Center Customer Service Overview
37. Call Center Customer Service Best Practices

#### **TIMELINE & EXAMINATION DATES:**

Programs are offered through open enrollment, making our programs 100% flexible with your current work or academic schedule. After joining you may select an examination date that works best for you. We offer the certification exam on the 1<sup>st</sup> Wednesday of each new month.

The Business Training Institute exams are administered 100% online. When you have completed the strategic project (outlined later in this study guide), please follow the project submission instructions. Once you have submitted your completed project, you are welcome to schedule your exam date.

**Please note that your exam date request must be received at least 2 weeks before the exam date.** For example, if you would like to sit for the January 10<sup>th</sup> exam, we would need to receive your request no later than December 27<sup>th</sup>.

#### **To register for an examination date:**

- 1.) Email your completed CSMC project (*explained in detail in this study guide*).
- 2.) Include your desired exam date in the email with your completed project.

#### **BENEFITS OF THE CSMC:**

- Specialized knowledge and instructions on how to attract, retain, and create loyal clients to build business through exceptional customer service.
- Confidence, an improved resume, and the right tools to use when facing customer service challenges.
- Training on customer service fundamentals and best practices that may be used in phone, in-person, email, or click-to-chat settings.

- Proof that you have mastered a certain level of customer service and loyalty specific knowledge by passing our online examination, all alumni receive a certificate showing their accomplishment within our program.
- Exclusive Access to tools and multimedia training resources found online within the CSMC Certification Program.
- Add the CSMC Designation to your resume, assuring employers that you are dedicated to working in the industry, passionate about learning more, and able to work more efficiently after being promoted or hired.

#### **PARTICIPANTS OF THE CSMC PROGRAM CAN INCLUDE:**

- Individuals interested in furthering his/her education and knowledge in business, customer service, and management of a customer service team
- Business owners looking to improve their company's customer service
- Seasoned management professionals looking to enter the customer service industry
- New business professionals who have just taken a position as head of a customer service team
- Customer service managers looking to improve their customer service knowledge and leverage the changes the customer service industry has experienced in the past 10 years

#### **LEARNING OBJECTIVES/GOALS OF THE CSMC**

- To obtain broadest spectrum of knowledge regarding the behavior and strategies needed in securing a loyal customer base.
- An understanding of the intricacies of customer loyalty.
- The right information needed to manage the people who your customers interact with.
- Successful, proven tactics from the best sources that is applicable for the real world.

#### **THE CSMC EXAM WILL TEST PARTICIPANTS IN 6 MAIN AREAS:**

1. Customer Service Overview:
  - a. Industry trends
  - b. Common practices
  - c. The current landscape
2. Customer Loyalty:
  - a. What defines it
  - b. What is the goal of any service provider?
  - c. Practices to pursue and secure it.
3. The Customer:
  - a. What creates and influences their perceptions and expectations.
  - b. Their needs and wants; how to uncover them
4. Problem Solving
  - a. How to handle issues
  - b. Work within acceptable terms to satisfy the customer
  - c. Dealing with difficult situations and people
5. Company Culture and Organizational Leadership
  - a. How company culture, attitudes and leadership impact customer service
  - b. The existing skewed perceptions and what companies must do to improve
6. Effective Communication Skills
  - a. Phone
  - b. Email
  - c. Phrases

d. Evaluation techniques

### III. REQUIRED READING

1. Delivering Knock Your Socks Off Customer Service by Kristen Anderson and Ron Zemke. ISBN :0814479707
2. Building Great Customer Experiences by Colin Shaw and John Ivens. ISBN 1403939497
3. Customer Satisfaction is Worthless; Customer Loyalty is Priceless by Jeffrey Gitomer ISBN: 188516730X

### IV. CUSTOMER SERVICE MANAGER CERTIFICATE (CSMC) STRATEGIC PROJECT:

The Customer Service Manager Certificate (CSMC) Program requires participants to complete a Strategic Customer Service Project to graduate from the program. This plan is worth 100 points and accounts for 50% of the total grade within the program.

As such, non-submission of this strategic plan will result in an automatic failing grade for the CSMC program. If you have any questions, please email us at [Team@BusinessTraining.com](mailto:Team@BusinessTraining.com).

This is a four (4) part Strategic Project, both the scenarios and the essay must be completed to receive full credit. Please be sure to complete the project in full before submitting your work.

**Project Goal:** (Scenario 1, 2 & 3) For this part of the Strategic Project, please use the following information for each scenario to create a solution. Please be sure to provide a solution that will not only appease the customer but prevent further complaints (internal) or word-of-mouth (external). There is no length requirement, so long as you provide a solution. Please keep answers under 500 words.

**Project Goal:** (Essay #4) Your essay must be at least two paragraphs long and answer the question fully. The more complete your answer is will determine the grade given.

**Requirements/Grading:** There is no specific format in which this project needs to be submitted. You may use Microsoft Word or PowerPoint just as an example. Please keep in mind this project is 50% of your grade and the more work you put into it will be reflected in the grade given.

Once the project is complete please send to [Team@BusinessTraining.com](mailto:Team@BusinessTraining.com) **tests cannot be scheduled until your project has been submitted.** To schedule yourself for an exam, date the project and a test date request must be submitted 2 weeks before the exam. For instance, to be eligible for the October 10<sup>th</sup> exam date you must submit your project and test date request no later than September 26<sup>th</sup>.

The information for the CSMS project is outlined on the next page.



## SCENARIOS:

### 1. Ms. Childs:

#### *The Scenario:*

You are a customer service manager for a large software company's customer service centers. One of the largest sellers you offer support for is a computer software product for photo imaging. You and your customer service representatives are not certified to give technical support, but you have all gone through training of installation, activation, and registration of the program, so you all know the basics.

You get a call from one of your reps about an upset customer, Mrs. Childs.

Mrs. Childs is a retired widow who lives alone. She is using your product, but is unable to make a simple change to some files on her computer, and is now calling to ask for your assistance. She is hard of hearing, not familiar with technology, and very afraid of being taken advantage of. She is also threatening to refund her product.

She is calling today in the hopes of getting some technical support, and would like to utilize the free support the product says is available to purchasers of the product. She has not yet registered her product, however, a requirement to receive the free support. Registration is normally optional, and not a requirement to use the product, but is required to receive the technical support.

Since it is optional, she does not want to register (and she will tell you this again), but still wants to get her free support for the program she is unable to use. She does not fully understand what registration is, and does not want to give out her personal information. This information is required, however, for Tech Support to offer her any support.

Registration ensures that, should the customer lose their CD Jewel Case or Serial Number, they can access it through a simple phone call to your company. It also ensures that you have a record of their calls so that they do not have to repeat themselves repeatedly, and the next time they call, you can pick up where you left off. It also means that she can call up to 2 more times with the same issue (if it is not solved, reoccurs, etc.) and continue receiving support for the same case (which is already comped.) If she does not complete registration, follow-up support calls cannot be made (since there will be no record), and future support calls will be charged at \$50/case.

Registration takes 2 minutes and requires the program serial number, a first and last name, email address, phone number, and address. For this promotion, the code on the box for the free support is also needed.

The solution with Tech Support may be an easy one (since she most likely misread the instructions), but she is also a slow computer user and technicians are paid a higher hourly wage. They can only be sent paying (or registered) customers, unless approved by the manager. Too much free support is something the company cannot offer, but the manager does can approve free support.

You tell your rep that you will take the call.

**Questions:** *What do you tell Mrs. Childs? What is your solution? Please write your "script" of what you would tell Mrs. Childs. You want to avoid her hanging up unhappy. Please feel free to rationalize and explain the reasoning you used for saying one thing or offering one solution over another.*

### 2. Ms. Childs, Part 2:

#### *The Scenario:*

Please read the information from Scenario #1. Mrs. Childs decided not to register her program and is now calling for the same issue. She was given free support, though she didn't register her program, and now wants to talk to Tech Support again. Since she didn't register her program, there is no record of her call, and she must now pay for support.

**Question:** *What do you tell Mrs. Childs this time?*

### **3. Mr. Smith:**

*The Overall Scenario:*

You are a manager of a large hotel chain in Portland, Oregon. You have been instructed by your boss (who has just completed the CMSC) that customers should be treated with great respect (even the difficult ones). You're told that you can go above and beyond your normal duties, or at least what is provided in a service or product purchased by a client. For example, normal delivery time on a room service order is 30 minutes. Delivering it in 20 or less is going above and beyond. Also providing something on the menu for free that costs little to add, such as an extra sauce the customer asks about, is something you can do. So long as the actual cost of the product is outweighed by the possibility of a loyal customer telling others about your service, you've been told you can do it. (The owner will, however, step in if someone is going overboard with giving things away for free.)

Your boss mentions "fixed costs", and how you can use them to your advantage. Fixed costs are things like rent, which will not change depending on how many guests the hotel has. That loss margin can decrease, however, if more rooms are full.

With your new instructions, you're presented with some ideal opportunities to try out the new customer service strategy.

*The Customer Scenario:*

Mr. Smith comes in to your hotel once a month for business. He stays for 4 nights and 5 days each time. He stays in a single room with simple amenities and doesn't cause trouble. He never seems overly thrilled with service, but your low rates, coupled with the hotel's location, seem to keep him coming back. Your competitors across the way, however, are offering a promotion: the same room, *for less*. Smith tells you about this as he's checking in. He mentions the flight was terrible this time, and the rental car wasn't what he was hoping to get. He also asks if the hotel bar is closed; you say it is, and that he just missed it closing 15 minutes ago. His flight was delayed, he says, and he looks noticeably disappointed.

**Question:** *Within reason (so you don't lose your job), what are some things you can offer to Mr. Smith to ensure he continues coming to your hotel?*

### **4. Essay**

In at least 2 paragraphs describe what being a stellar customer service representative/manager entails from the information provided in the online content and required readings. Include qualities, aptitude, experience, attitude etc.

## **CSMC EXAM PREPARATION**

### **EXAM COMPOSITION:**

There is a total of 100 points available to earn for the exam, 80 of which can be earned from the multiple choice or true/ false questions that are worth 1 point each, and 20 of which can be earned from 2 short answer questions that are worth 10 points each.

Please see below for the composition and distribution of the points in-depth.

<b>Topics and Weights</b>	
Customer Service Overview	14 MC questions (14 pts)
Customer Loyalty	12 MC questions (12 pts)
The Customer	14 MC questions (14 pts)
Problem Solving	14 MC questions (14 pts)
Company Culture & Organizational Leadership	12 MC questions (12 pts)
Effective Communication Skills	14 MC questions (14 pts)
Case Study Examples/ Situational 2 Essay Questions	2 Questions (20 pts)

You will have 2 hours to complete the exam. Those who have not made the effort to read the materials will have a hard time completing the exam within the allotted time, but for participants who have read the required readings 2 hours will be sufficient.

**To pass the CSMC certification and earn the CSMC title, participants must earn a minimum grade of 80%.**

### **TERMS AND CONCEPTS TO KNOW:**

Below, please find the exam topics and the corresponding terms and concepts that you should be able to define after having read the required readings.

Please define the terms from the required readings rather than a dictionary. You will be tested on the definitions that authors have written.

#### **Customer Service Overview**

- Competitive advantage
- Brand
- Differentiation
- Customer experience (CE)
- The physical CE

- The emotional CE
- Expectations
- Word of mouth
- Embodying the brand
- Commoditization
- Call centers
- Product
- Perception
- Brand promise

### **Customer Loyalty**

- Loyalty
- Trust
- Transparency
- CRM –Customer Relationship Management
- Tangibles
- Responsiveness
- Reliability
- Reassurance
- Reassurance
- Internal customers

### **The Customer**

- Stages of the customer experience
- Attitude
- Motivators
- Closed ended vs. opened-ended questions
- Asking questions
- Emotional intelligence
- Motivations
- The catch point
- Consistency
- Standards
- Initiatives

### **Problem Solving**

- Emotional awareness
- Empathy
- Business objectives
- Benchmarking
- Internal communication
- Rule breaking-types of rules
- Measures
- Targets
- Satisfaction
- Promises

- Taking responsibility
- Apologies
- Recovery

### **Organization and Culture**

- Culture
- Empowerment
- Operations
- Awareness
- Overlaps
- Transactional costs
- Ownership
- Involvement
- Consistency
- Inside-out culture
- Outside-in culture
- Defined Culture
- Aligned culture
- Signed culture
- Designed Culture
- Leadership
- Multi-channels of communication

### **Effective Communication**

- Greetings
- First impressions
- Visual impressions
- Accountability
- Non-verbal communication
- Listening
- Trigger words
- Rapport building
- Transferring calls
- Satisfactory
- Policy
- Rules
- Voice tone and pace
- Body language
- Sympathy

### **SAMPLE QUESTIONS:**

1. Which one of the following is NOT a reason for current poor customer service?
  - a. No written principles
  - b. Infrequent employee training
  - c. The goal is to satisfy customers

d. Fierce competition

2. The key Customer Experience Differentiator is:

- a. Price
- b. Features
- c. Feelings
- d. Quality

3. One of the major evaluations of customer service is responsiveness. An example of responsive service that goes above and beyond to provide the ultimate experience is:

- a. A short call queue
- b. Asking the customer their time needs and then agreeing to and delivering on that request.
- c. Giving the customer a time window for product/ service delivery, aka. 'ready next week...' to not over promise and under deliver.
- d. Providing a comfortable waiting area with beverages, magazines, etc.

4. Which of the following is NOT a major evaluation of exceptional customer service?

- a. Reliability
- b. Assurance
- c. Satisfaction
- d. Tangibles

5. Often overlooked, competitive advantages aren't the most obvious. An example of a clothing retailers would be:

- a. Best value
- b. The most prevalent advertising
- c. Celebrity endorsements and expert accolades
- d. A non-expiring return policy

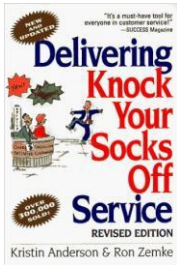
6. What is the fundamental aspect of great customer experiences that result in long-term competitive advantage?

- a. Emotional connection
- b. Proven reliability
- c. Actualized value
- d. Ultimate convenience

7. The value of retaining existing customers is undeniable. Per the Technical Assistance Research Programs, Inc. (TARP), at least how much more does it cost to obtain a new customer than to keep a current one?

- A. 5 times as much
- B. Double the amount
- C. Up to 2 percent more depending on advertising quality
- D. 10 times as much

## V. BOOK REVIEWS



### Delivering Knock Your Socks Off Customer Service

Anderson and Zemke give the truth, straight and simple, about truly great customer service and the components of relationship building involved in any interaction. Outlining behaviors and problem solving tactics, their strategies ensure delivery of the highest standard of service every time.

#### **Part I: The Fundamental Principles of KYSO (knock your socks off) Service**

1. The one unbreakable rule:

You ARE the company- use “I” instead of “we”, don’t mention policy.

2. Know what KYSO Service is:

3. **Reliable**-keeping the service promise

- a. Organizational commitments: Through ads, communication materials, product warranties, etc. the company has promised certain things in the eyes of the customer.
- b. The customers’ expectations take the form of promises in their minds common expectations-from past experiences, competitor interactions and expectations; they bring these preset perspectives to the table.
- c. Personal promises-promises you or another employee has made you must manage these promises- once you know what they expect, you must formulate the promises you make based on what you can and cannot do for the customer.
- d. When promises are broken- first apologizing, don’t place blame.
- e. Timing is everything - find out what the customer now needs and do what you can to provide it in feasible, reliable terms and facts.
  - Find out the customer’s time frame-how soon is soon? What do they expect from you?
  - When setting a deadline, be realistic and be certain you can meet it.
  - Customers will be more dissatisfied with uncertainty than having to wait- give them the whole truth.

4. **Responsiveness** - it reassures customers when you follow through on your promise delivery schedules for example are especially important.

5. **Reassuring**- being friendly and well-mannered goes a long way, but proving your competency and reassuring the delivery of results is what matters. Trust is built on your knowledge, comprised of:

- a. Product knowledge-features, benefits, advantages etc.
- b. Company knowledge- know how the organization works so you can guide them to who can help them
- c. Listening skills- expect you to listen, understand and respond to any inquiry. Ask pertinent questions to uncover more information of the issue to get to the heart of the problem to fix it.

- d. Problem solving skills-customers expect you'll recognize their needs and quickly align them with services your organization provides. They expect you to be able to fix whatever goes wrong fast.
- e. Not just first impressions, but the entire interaction conveys your competency. Your mannerisms, dress, couth, etc. all can either help reassure a customer or hinder obtaining their trust.

6. **Empathetic**-Everyone has different emotional states and responds to different approaches-customize your strategy to their personality to generate better results.

- Empathy vs. sympathy--sympathy means identifying with and even taking on another's emotion, whereas empathy involves acknowledging and affirming another's emotional state.
- Be emotionally aware and sensitive, but remain emotionally uninvolved.

Essential to stay calm and professional, while still showing you care.

7. **Tangibles**- it's tough to define and describe an experience or feeling. While it's hard to put service into tangibles, it must be- all about quality not quantity.

8. **Customers** are everywhere- inside and out

- External-those that buy your products and services
- Internal-employees-their work and success is dependent on your work-identify them!
- Treating internal well conveys a positive perception to the externals.

## 9. Ten Deadly Sins of Customer Service:

1. Saying I don't know-customers expect you to know the answer or at least who else does that you can put them in touch with. Say I'll find out instead.
2. I don't care-reassure them, show you care!
3. I can't be bothered-the customer is your priority above all else- show them they are.
4. 'I don't like you'-customers can be sensitive to subtleties, do your best to convey friendliness and hide any personal grievances.
5. 'I know it all'-Don't get at solving the issue until the customer has fully communicated their problem---listen first, then act.
6. 'You don't know anything'- don't be condescending, help them understand it versus belittling them. There are no dumb questions.
7. 'We don't want your kind'-don't judge anyone and be sure not to appear that you are regardless of race, dress, etc. treat everyone equal, you never know who could turn out to be the best customer.
8. 'Don't come back'-don't act inconvenienced, annoyed etc. convey you want to see them again in the future.
9. 'I'm right and you're wrong'-don't argue with them, it's a personal pride issue; instead try to give them the benefit of the doubt.
10. Hurry up and wait-don't waste their time, ever!

Make the customers feel:



Heard, understood, liked, respected, feel helped, appreciated and respected.

**10. Customer Service** is always-the Customer

1. The customer is NOT always right
2. Without admitting the problem and misunderstanding, you cannot solve it.
3. How to make the customer right?
  - a. Assume innocence-they may be explaining it wrong or are simply misunderstand— help them obtain the correct information without making them feel dumb.
  - b. Look for teaching opportunities: what information could they have used before the issue arose?
  - c. Make sure they get it all and are in the state to be receptive-angry people often don't want to be told or taught anything.
  - d. Believe them-try to see if anything they are saying is in fact true. It's better to assume than to write them off as wrong.
  - e. Verify info. In front of them-double check the rules, etc.

**Part II**

**11. Honesty is the only policy because:**

- It always catches up to you
- Customers respect honesty
- You feel good about yourself which translates in your performance

**12. Broken Rule**

- Purpose of rules is to make things run more smoothly, effectively and organized, yet not all achieve this goal
- Rules vs. assumptions
- Don't assume there's a rule-find out for sure!
- There are types of rules: Red and Blue
  - Red: Serious consequences; legal, safety, rule cannot be bent
  - Blue: More policy centered and often need adjusting based on the scenario – use your experience and judgement to decide proper changes – know your own limits and when you need to check with a manager
- Learn why a rule is there in the first place this will allow you to determine its color/type, know its nature and the consequences

**13. Do the right Thing regardless!**

- Knowledge-know company rules, why they're there, etc. knowing customer's needs and expectations is also critical, along with the technical aspect to the job and the personal skills necessary to deal with problems.
- Action-oriented- take initiative, own the situation.
- Making judgments based on customer needs/use of the product. The 'policy' is to provide and often not in 'told' ways.
- Does the real situation
  1. Break a red rule
  2. If it's a blue rule – what is the result – why is it and what are the consequences

3. Who should make the final decision – are you in the position to do so or should you check with your manager?

#### **14. Listening as a skill – use it!**

- When you listen well you:
  - Determine the customer's wants and needs
  - Prevent misunderstandings
  - Get clues on how to improve service, increase sales
  - Build long-term customer relationships
- Listening can be learned –
  - Write stuff down-begin formulating ideas, but don't lose focus
  - Use it to reflect back-confirm what you heard
  - Ask if you're unclear on any of it
  - Reiterate critical information- spellings, contact info, etc.
- Barriers to effective listening
  - Noise-can you hear them well?
  - Interruptions-don't get distracted- says you don't care enough
  - Daydreaming
  - Technical issues-can't hear well, know how to operate the tech. systems
  - Stereotypes-sets up false judgments that are difficult to overcome later
  - Trigger words and phrases-don't let them get you
  - Personality-know different types and tailor your approach accordingly
  - Attitude-be positive, objective- don't get defensive, it limits you to hearing only what you want/expect to

#### **15. Ask intelligent questions!**

##### ***3 Types of Questions***

1. Background- intros-tells you who they are, profile, etc.
  - i. Helps you evaluate if you are the right person to take call
  - ii. If protest anything, preview it and tell them you need to ask certain about certain information for their benefit.
2. Probing-delve deeper into the issue
  - i. Closed and open ended questions
  - ii. Ask them to tell you more
3. Confirmation questions
  - i. Checks & balances system-ensures you are correct and have everything you need-don't patronize when clearing up any questions they have-figure out why they don't fully understand and work with them.
  - ii. When questions go wrong.
    1. Timing- is it out of context?
    2. Ask something they think u should know already
    3. Too many questions
    4. Too personal- ensure confidence and preface it will be for their benefit

#### **16. Winning words and soothing phrases- review list of phrases- avoid conveying 'I think you're stupid'**

## **17. Face to Face Non-Verbal communication**

9 basic dimensions

1. Proximity
2. Eye-contact
3. Silence-don't be awkward, but prove you're listening
4. Gestures-body language
5. Posture
6. Facial expression
7. Physical contact
8. Smell-easy on the cologne
9. Overall appearance

Read their non-verbal clues-what is their perception of you? Be perceptive yourself.

## **18. Tips for the Phone**

- Style
  - Audibility
  - Clear articulation
  - Steady pace
  - Pleasant tone
  - Enthusiastic
- Techniques:
  - Answer quickly
  - Greet courteously
  - Identify yourself to caller
  - Transfer calls professionally-try to avoid, explain why and give new contact info
  - Putting customers on hold-ask their permission first
  - Take complete and accurate messages-reiterate info back to confirm 5
  - Voicemail-be as specific as possible-when you'll be back, what info to leave, etc. and return as calls ASAP.

## **19. Putting Pen to Paper or Fingers to Keyboard**

Your message – you write to:

- Confirm understanding-follow letter is a form of confirming info via written communication.
- Create documentation- paper trails help keep evidence of progress or to back-up a verbal conversation
- Solidify relationships – helps make tangible and memorable fleeting in-person interactions- thank you notes, etc.

### Letter Writing Tips

- Be neat and legible

- Use co. letter head
- Use standard paper, unless it's a small personal note
- Be concise-keep it to 1 page or less
- Write in first person and in active tense
- Write how you speak-don't sound bureaucratic
- Write with correct spelling and grammar.
- CONSIDER YOUR AUDIENCE! –Watch jargon, etc.

### Email Tips

- Be personal
- Don't use a lot of italics, bolds, etc. keep it simple
- Don't YELL- be cognizant of how your text sounds
- The outcome: your correspondence must clearly communicate the action, if any, they need to take—what do you expect to come from that writing? Make sure your words get that across

### **20. Exceptional Service is in the details - Attention to detail - everything counts!**

The moment of truth-anytime anyone comes in to contact with your organization employees, product, ads, etc.

Managing the moment of truth:

1. Never stop learning-as experienced as you may be in your role, there's always more to learn and new situations to handle and new customers to deal with.
2. Ask your customers-the only real way to identify customers' moments is to get them to describe them to you
3. Ask your company- ask for survey stats and other studies your co. does to help you identify other moments.

It's the little annoyances that drive customers away more than the big issues.

### 21. . Good selling is good service-good service is good selling

Sales and service both have goal of satisfying the customer, but selling is not good service if:

- There are no alternatives provided
- When there is no slack-, no chance to redeem and they're mad and unwavering
- When there is no point- don't add something on that has no relevance
- When selling is good service
- When the product or service the customer acquired from your company is right but there are missing pieces or another process is needed
- When the product or service is out of date-suggest upgrade, give free trial but offer new product for purchase
- When the model or system the customer is using is wrong and you know which is right and help orient them toward the better option.
- When an add-on feature will forestall other problems, suggesting an extended warranty when problems have already occurred and are probably bound to reoccur.

- When changing the customer to a different product or service will be value added or TLC- making appropriate tweaks and changes to better service customers.

22. . Never underestimate the value of a sincere thank

you Nine times when you should say thanks

1. When they do business with you-every time
2. When they complement you
3. When they offer comments or suggestions
4. When they try a new product or service-trying something new can be uncomfortable-be sure to tell them you recognize this and appreciate it
5. When they recommend a friend to you
6. When they are patient- and not so patient
7. When they help you to serve them better- when customers do their research and help the process
8. When they complain to you –it’s feedback-now you have the chance to make them loyal customers
9. When they make you smile

Three ways to say thank you- and do so immediately!

1. Verbally-say it after every encounter-say it with feeling-warm, pleasant, personal
2. In writing-send a follow up note
3. With a gift-make sure the value of the gift isn’t out of balance with the nature of the business involved.

Often forgotten to send a “thank you” to:

1. Co-workers- give credit your colleagues deserve
2. Your boss
3. People in other departments
4. Thank your vendors
5. Thank yourself

**Part III:** The problem-solving side of knock your socks off service. -be fantastic fixer customers don’t expect everything to be perfect, but they do expect you to fix it, fast and correctly-the art of recovery-decide which method fits the customer and situation:

## **VI. FAQ (FREQUENTLY ASKED QUESTIONS):**

**Have more questions or need more information?** Please see our constantly updated FAQ (Frequently Asked Questions) section on the Business Training Institute website here at <http://BusinessTraining.com/FAQ/>

You can also get in touch with the Business Training Institute team over email at Team@BusinessTraining.com, by phone at 305-503-9050 and through our ClickAndChat tool, accessible from our homepage: <http://BusinessTraining.com>.

Thanks for joining The Business Training Institute! Please let us know if you have any questions.

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**SAMPLE QUESTION ANSWERS:**

Please see the following answers to the sample questions provided. A brief explanation was given for each answer and why the other options were incorrect. If you didn't do as well as you thought you would have, please consider re-reading the books or supplementary readings as the sample questions were drawn directly from them.

1. **D** - Customer service is how companies gain the edge over that fierce competition; it isn't a hindrance but a necessary reality that exceptional customer service is critical.
2. **C** - Feelings: Emotion is what comprises an experience and differentiates it from the classic components of a customer's purchase.
3. **B** - Determining the customers' specific needs is a critical in delivering the best of service. Instead of giving them your timeline, work as best you can (without under promising) around their schedule. The more specific the time, the better... widows of time are frustrating, even if you must make it a little longer, it's best to be as exact as possible.
4. **C** - Satisfaction is just that...it does not denote loyalty, the ultimate result of exceptional customer service. Just because a customer is satisfied, doesn't guarantee they'll continue to be a customer.
5. **D** -While importance of the other factors certainly exists, it's the extras that add to the experience for a customer, such as the ability to return a good whenever. The feeling of security and concern the shopper has because of that term will carry them toward the loyalty level.
6. **A** - The emotional aspect is what reigns in repeat purchasers; all the other elements can be sought elsewhere, however, a feel-good interaction will steer a customer back above all else.
7. **A** - It costs at least 5 times as much to win new customers that to maintain current customers, and in certain industries the ratio can be as high as 21.