



Critical Elements of Customer Service

Independent Learner's Guide

Copyright

© Velsoft Training Materials, Inc. Adapted and used under licence by TEIA Ltd.

Notice of Rights No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language or computer language, in any form or by any means, electronic, mechanical, magnetic, optical, chemical, manual, or otherwise, without the prior written permission of the owners.

Disclaimer

We make a sincere effort to ensure the accuracy of the material described herein; however there is no warranty, expressed or implied, with respect to the quality, correctness, reliability, accuracy, or freedom from error of this document or the products it describes. Information used in examples are intended to be fictional. Any resemblance to real persons or companies is entirely coincidental.

Table of Contents

Session One: Course Overview	1
Course Overview.....	1
Learning Objectives.....	1
Session Two: What is Customer Service?	2
What is Customer Service?.....	2
Who Are Your Customers?	2
Meeting Expectations.....	3
Review.....	4
Session THREE: Setting Goals	7
Creating a Personal Values Statement	7
Activity 1.....	7
Identifying and Setting Goals.....	9
What is a SMART Goal?	11
How to Create a SMART Goal Statement	12
Making Connections.....	13
Session Five: The Critical Elements of Customer Service	14
The First Critical Element – A Focus on Customer Service.....	14
Session Six: The Second Critical Element – Procedures	15
What are Our Standards?.....	15
Activity 2 - Drafting Standards.....	15
Session Seven: The Third Critical Element – Culture	17
What Do You Think?.....	17
Quiz	18
Session Eight: The Fourth Critical Element – Problem-Solving	19
Seven Steps to Customer Problem Solving.....	19
ACTIVITY 3 - CASE STUDY.....	19
Session Nine: The Fifth Critical Element – Measurement	21
Tools to Use.....	21
Activity 4 - Measurement in Practice	22
Session Ten: The Sixth Critical Element – Reinforcement	23
Reinforcement Techniques.....	23
Developing and Maintaining Relationships	23
Recognizing the Power of Your Behavior	24
Likeability Works.....	24
Session Eleven: Communication Skills	25
Defining Communication.....	25
Body Language Basics.....	26
Voice	26

Asking Questions.....	27
Empathy	28
Dangerous Misconceptions	29
Power Talk.....	29
How to Feel Powerful in Your Position.....	30
Session Twelve: Telephone Techniques	32
Telephone Basics.....	32
Handling Everyday Requests.....	34
Taking a Message.....	35
Tips and Tricks	36
Session Thirteen: Dealing With Difficult Customers	38
Reducing Conflict	38
Session Fourteen: Dealing With Challenges Assertively	42
An Assertiveness Model	42
Session Fifteen: Dealing With Difficult People	43
Getting to the Heart of the Matter	43
What is Missing?	43
The Three F's	44
The Recovery Process.....	44
Session Sixteen: Reflective Practice	46
Conducting a Reflection	46
Extra Information.....	47
Session Seventeen: Dealing With Stress.....	49
About Stress.....	49
Recommended Reading List	51

SESSION ONE: COURSE OVERVIEW

COURSE OVERVIEW

While many companies promise to deliver an incredible customer experience, some are better at supplying this than others. This self-paced module is designed around six critical elements of customer service that, when carried out, bring customers back to experience service that outdoes the competition.

LEARNING OBJECTIVES

At the end of this course, you will be able to:

- Understand what a customer service approach is
- Understand how your own behavior affects the behavior of others
- Demonstrate confidence and skill as a problem solver
- Apply techniques to deal with difficult customers
- Know how to provide excellent customer service

SESSION TWO: WHAT IS CUSTOMER SERVICE?

WHAT IS CUSTOMER SERVICE?

Customer service is the way you treat the people who support your company. These can be paying customers (**external** customers) or staff members (**internal** customers). The customer's perception of that service is what brings them back to you for repeated service. Great service is what they cite when they send referrals to you.

People who provide good customer service (regardless of the nature of their business) earn psychological benefits in addition to any rewards offered by their company. If you are unhappy in your job, take an objective look at the kind of service you are giving. In almost every case, your job satisfaction mirrors the satisfaction people feel when doing business with you. Giving poor service is a way of beating up on yourself.

WHO ARE YOUR CUSTOMERS?

Who are our customers? For many of us, customers are easy to identify. They buy something from us, or we serve them in some way. People will sometimes say, *"I do not work directly with customers."* Before you accept this idea, try taking a closer look at who your customers are.

In most organizations and agencies, customers take two forms: internal and external.

Internal customers are the people, departments, or agencies served by what we do. The only person who might have no internal customers is the individual who works completely alone. For the rest of us, internal customers are a fact of life. Do you meet with external customers, or somehow meet the needs of internal customers, like your co-workers?

As individuals, we all have at least one internal customer: our boss. We may also have internal customers in the form of people we supervise. They rely on us to meet their needs and they form opinions about how well we meet those needs.

External customers are the people, departments, or tenants who are the end users of our organization's products or services. This is a much more traditional use of the term "customer."

Do you have **VIP** (very important person) customers, people who rate extra special service? You may think that certain customers who spend a lot of money at your business are VIPs.

In reality, all the people we work with are our customers and deserve VIP treatment. When we treat all of our customers like VIPs, we start to become known as an organization that offers exceptional service to everyone.

What do people want? At the simplest level, our customers have some basic needs:

- They want to be understood.
- They want to feel welcome.
- They want to feel important.
- They want to feel comfortable.

MEETING EXPECTATIONS

Every individual's needs are important. Each customer wants to be treated like they are your only customer. They know that is not true, just as well as you do, but they still want that kind of attention. A service-oriented philosophy says that you are there for your customer.

How do you feel about knowing that customers today are much more demanding than they were 50 years ago? The customer's expectations are higher than ever, they know more about you and your products, and they also know about your competition.

Here are six ways to meet your customer's expectations.

- If the telephone is ringing, make sure someone answers it. If no one is available, then a voice prompt will suffice (provided that it is working properly). People appreciate talking to people when they call to get service.
- When a customer enters your premises, greet them as though you are happy to see them. Do not leave someone standing awkwardly.
- Be present for your customer. Your body language and tone of voice, whether you are on the phone or in person, need to let your customer know that you want to be there and you are pleased to serve them.
- Be polite. There is no excuse for bad manners. Your customer will not forget rudeness, even when they are being difficult.
- Pay attention to the details. If you promise something, make sure you deliver. Wow them by being on time and remembering all of the required pieces.
- Always thank your guest. There is a lot of competition out there, so your goal is to retain your customer, not send them to a rival company. Even if you are providing a service, they cannot get somewhere else (like a government department issuing a driver's license), be thankful for their attention and business.

REVIEW

1. **People who are successful at customer relations constantly need to be the center of attention.**

False. People who are successful at customer relations constantly put their customers first and make them feel important.

2. **Customer service staff are the only people responsible for providing quality customer service.**

False. Everybody who works for the company is responsible for customer service to clients and internal customers. It does not matter whether you work in accounts payable or as a maintenance employee; you are part of the customer service team.

3. **Good service employees are at the mercy of their customers and thus have little control over their success on the job.**

False. Good service employees have a surprising amount of control over their ability to do a successful job. You have control over setting high standards of performance, choosing how you will deal with people, and deciding how you will react to difficult situations.

4. **Treating customers as VIP's often means apologizing for mistakes you did not make.**

True. You are not diminished in any way by apologizing for someone else's error or apologizing for the situation that caused a customer's dissatisfaction.

5. **It is not important to remember the names and faces of the people who come to your organization.**

False. Remembering names and faces is one of the most important things you can do to make people feel important and comfortable.

6. **If you have a limited desire to serve others, you probably should not be in a service-related job.**

True. Serving others is what customer service is all about.

7. **How you handle the procedural or technical side of your job can directly affect how you handle the personal side.**

True. If you can handle the technical side of your job efficiently, you are more apt to feel in control over difficult problems in other areas. On the other hand, if you are unsure of your skill and ability or do not understand procedures, this lack of confidence and/or ability will add stress when you must deal with customers.

8. **Knowing the time requirements for providing quality service will help you do a better job.**

True. If you know how much time a task should take, you have standards to aim for and to measure your own skill and ability by.

- 9. Good anticipation means providing items and services for customers without requiring them to ask.**

True. For example, if you notice that most people want to drive away with a clean vehicle after service work has been done, you will make every effort to wash vehicles after they have been repaired. If you know that people appreciate it when you identify yourself clearly each time you answer the phone lines, you are not likely to forget and just say, "Can I help you?"

- 10. When communicating with another person, it is important to always consider and protect his or her self-esteem.**

True. Self-esteem is a very fragile thing. Making somebody else feel small does not take much, and it does not make us look or sound any bigger.

- 11. Your body language only minimally influences good communication.**

False. Body language, including eye contact, are very important parts of good communication.

- 12. Feedback rarely provides the information necessary to do a better job.**

False. Constructive feedback, when given sincerely and tactfully, can help us identify expectations and show us where we are going wrong. Positive feedback can make us feel appreciated and good at our work.

- 13. If you are not careful, working on a computer can adversely affect your attentiveness toward customers.**

True. We can sacrifice valuable time trying to get a computer to work, or we may forget to make eye contact with the customer because we are staring at the computer screen.

- 14. Generally, the attitude you receive from others is the same attitude you transmit.**

True. Generally, we get treated by others in the same way we treat them.

- 15. Reading the customer correctly can pay great dividends to you and your organization.**

True. Noticing the unhappy, lost, or frightened customer and helping them, or asking the angry customer how you can help them, can make them feel more loyal. While your organization is attracting and keeping customers, your job will be more secure.

- 16. Most people simply want fast service and have little need to feel important or be recognized.**

False. It is true that most people want to be served quickly and efficiently, but they also want to feel like they are recognized and made to feel important.

17. Body language often communicates more than the actual words you use.

True. Even without any conscious effort, we all make our own interpretations about body language.

18. When a customer is rude, obnoxious, and impolite, it is justifiable for you to return the same behavior.

False. It is *never* justifiable to be rude or impolite to a guest.

19. It is impractical to think that you can meet the expectations of every customer.

False. Meeting expectations is our job. Exceeding them enhances the experience for the customer.

20. Customer complaints should be encouraged at your organization.

True. Only when we know what customers are unhappy about will we have an opportunity to fix things and make them satisfied.

SESSION THREE: SETTING GOALS

CREATING A PERSONAL VALUES STATEMENT

Developing a personal values statement will inform and help you set short- and long-term goals, which should influence your daily plan. Everyone should know what they want from life and have a plan to get there.

There are three important steps to creating your personal values statement.

ACTIVITY 1

Step One: Identify Your Values

The list below reflects some common values. Choose the 10 that are most important to you as a person (meaning that they apply both at work and at home). You can customize the wording or add your own to the list.

Ability to make decisions and implement them	Ability to persuade and influence others	Achieving excellence
Achieving fame and recognition	Adventure and excitement	Behaving ethically
Being challenged by pressures and deadlines	Being organized and dependable	Being skilled and capable
Building a family	Building meaningful relationships with others	Competition with others
Contributing to society	Cooperation with others	Demonstrating expertise
Diversity in daily tasks	Doing something meaningful	Efficient and effective
Enjoying what you do	Environmental rights	Establishing a reputation
Expressing creativity	Feeling excited and stimulated by life	Feeling independent
Feeling of belonging and community	Feeling of inner harmony	Feeling of patriotism
Financial security	Financial wealth	Free speech/human rights

Freedom to set your own pace and goals	Having a feeling of security	Having power and control
Having privacy	Helping those in need	Religion and/or spirituality
Leading others to success	Moving at a fast pace	Moving at a slow pace
Being productive	Reliability	Self-development
Sense of accomplishment	Serving the public	Spontaneity
Truth and integrity	Working as part of a team	Working individually

We cannot focus on too many things at one time and remain effective. Look at the 10 values you selected and select the five that are most important to you. Cross the others off. Be firm with yourself if you need to be. Remember, you are focusing on what is really important to you.

Next, reduce the list to just three values. These are the things at your very core. Cross the other two off your list. Put circles around the three items that are your core values.

Step Two: Define Your Values

Now, outline what success for each of those values would look like.

Value One

Value Two

Value Three

Step Three: Put It All Together

Finally, bring the three statements together into one paragraph. You may feel that you need to go back and re-evaluate your values, or you may want to re-work some sentences to create what is meaningful to you. That is OK! Above all, this should be a reflection of your innermost thoughts and a roadmap for how you would like to conduct your life.

Use the space below to write out your vision statement.

IDENTIFYING AND SETTING GOALS

Your organization probably has goals that are reviewed regularly to keep focused on priorities and make adjustments as they are needed. By setting goals on a personal level, we have the opportunity for the same kind of success.

Most people do not write their goals down but doing so gives you something concrete to refer to and helps to keep you on track. If you know people who are really successful, there is a very good chance that their goals are written down and that they look at them regularly.

In our example for the above, an example of a values statement is:

“In my life, I would like get the most out of each day by being as productive as possible. For me, being productive means feeling good about what I have accomplished at the end of the day and knowing that I have helped as many people as possible. It is important to me to do this in a way that allows me to feel good about my choices and to know that I have maintained my integrity while giving my best in work and life. As well, I need to feel challenged in my life. I like overcoming new problems and meeting new people while having new experiences.”

Specific goals might include:

- Exceed my customer service targets.
- Become more educated about communication skills.

- Learn how to do yoga and practice it daily.
- Climb Mount Everest.

Clearly some of these are achievable in the short-term, while others will take longer. Some will obviously take more work than others.

SMART GOALS

S	SPECIFIC State exactly what you want to accomplish.
M	MEASURABLE Use smaller, mini-goals to measure progress.
A	ACHIEVABLE Make your goal reasonable.
R	REALISTIC Set a goal that is relevant to your life.
T	TIMELY Give yourself time, but set a deadline.

WHAT IS A SMART GOAL?

A **SMART** goal is **S**pecific, **M**easurable, **A**ttainable, **R**elevant and **T**ime-framed.

<p>Specific</p>	<ul style="list-style-type: none"> ● A SMART goal describes a specific, observable action or behavior using action verbs and defines “what has to be done?” ● Does it relate to my job? ● What am I going to achieve as a result of this target? ● Does it relate to the departmental plan? ● Does it clearly define the function to be performed?
<p>Measurable*</p>	<ul style="list-style-type: none"> ● Outcomes or end results in qualitative or quantitative terms. ● Can the result be easily defined or measured? ● How can I check/observe progress and verify outcomes? ● Can the limits and parameters of the goal be defined? ● How will I know when the target is met?
<p>Attainable</p>	<ul style="list-style-type: none"> ● Goals are within reach – both realistic and reasonable given the required skills and resources are provided. ● How difficult will it be to achieve this goal? ● What would prevent this goal from being achieved? ● Is it realistic in terms of my knowledge, experience and skills and/or what resources will I need to achieve the goal? ● Is it within my control?
<p>Relevant</p>	<ul style="list-style-type: none"> ● A SMART goal is relevant to individual responsibilities, departmental goals and the strategic direction of the organization. ● Does this goal make sense considering my job description and daily responsibilities? ● Does this goal address the needs of the organization? ● Why is this goal important to the organization?
<p>Time-framed</p>	<ul style="list-style-type: none"> ● SMART goals have specific target dates, frequencies or deadlines. ● Is there an end date, deadline, and/or milestone for the result? ● How long will it take to achieve this goal? ● Are there progress review check points?

***Qualitative goals:** Not all goals are easily measured. A qualitative goal measures the relationship between cause and effect and is descriptive in nature. An example of a qualitative goal is: “to build better business relationships through partnering more with clients on programs and initiatives.”

Quantitative goals: Are measures that can be expressed in real numbers. Examples of quantitative goals might be to: “reduce error rate from five per cent to three per cent...” or “increase retention rate by five per cent.”

HOW TO CREATE A SMART GOAL STATEMENT

This exercise will help participants to create effective goals.

Let’s differentiate between goals and duties/responsibilities:

A job duty/responsibility is a statement of normal work output, a clearly established responsibility or requirement of the job. Duties are found in a job description. Examples include maintaining a database, preparing travel requests, and scheduling meetings.

A goal is a statement of specific work-related achievement to be accomplished within a specified time frame.

You may set routine, problem-solving, or innovative goals, or a combination of all three:

Routine Goals (Normal Work Output; Duty/Responsibility)

While all duties on a job description are not likely to be listed under goals/duties, there may be a duty or responsibility that is so pertinent to the employee’s job that you decide to include it as a major focus area in goal setting. An example of a routine goal: “To prepare the monthly production statistics report”.

Problem-Solving Goals (Quality Improvement)

You might have set a goal to improve a work process, behavior or function. An example of a problem-solving goal: “To improve the readability and format of the production statistics report.

Innovative Goals (Something New)

Perhaps you have ideas for new ways for the employee to perform work or carry out his/her areas of responsibility. An example of an Innovative goal: “To create a new electronic Template for preparing the monthly production statistical report”.

Start by making a list of your key tasks, accountabilities or responsibilities (refer to job description or job posting as a reference point). Goals should reflect the day to day – and not simply focus on special activities and/or projects.

Put each of your goal ideas to the test by answering the following **SMART** questions for each goal:

S - Does this goal have a clearly defined function or result? Yes No

M - Is this goal measurable? Yes No

A - Is this goal realistic, attainable and within my control? Yes No

R - Will this goal help my department/school achieve its goals? Yes No

T - Is the deadline one that I can meet with the resources available? Yes No

If you answered “No” to any of the above questions, consider a revision of your goal idea so that your answer to each **SMART** goal question is “Yes.”

MAKING CONNECTIONS

Our goals should serve as a guideline for our day-to-day planning and customer service approach. We suggest putting something on your to-do list every week to move you towards your goals. Otherwise, you are not likely to meet your goals at all. It is much easier to tackle a task if it is broken up into small action items!

SESSION FIVE: THE CRITICAL ELEMENTS OF CUSTOMER SERVICE

The six critical elements of customer service are:

1. Focus
2. Procedures
3. Culture
4. Problem-solving
5. Measurement
6. Reinforcement

THE FIRST CRITICAL ELEMENT – A FOCUS ON CUSTOMER SERVICE

The first critical element of customer service is a **customer service focus**. Improving customer service begins with proclaiming that customer service is a priority.

It is necessary to understand important concepts about customer service before we can do a really good job of providing it.

Three beliefs about customer service:

1. Service is a philosophy—not a department, a program, or a policy.
2. Service means meeting, not necessarily exceeding, customer expectations.
3. Service is not always natural, automatic, or coincidental.

What do you believe each of the phrases mean? What do they mean for you in your role?

SESSION SIX: THE SECOND CRITICAL ELEMENT – PROCEDURES

WHAT ARE OUR STANDARDS?

Standards are helpful because they let us know what is expected of us. They also tell us what we have to do in order for our work to be considered satisfactory by our supervisors or managers.

Standards also need to meet the expectations of our customers, while still being reasonable. The customer may feel that the phone should be answered on the first ring, but the company may have a standard of two or three rings. Since this is close to what the customer expects, it might be considered good enough. However, we should make certain that our standards are meeting or exceeding the expectations of our customers. The only way to do this is to ask our customers, on an ongoing basis, if they are satisfied with the service.

In order to meet expectations, we need to know what the standards are. Here are some sample standards.

- If customers ask to have their repairs completed in 24 hours, and your standard turnaround is three days, you have to be clear on what you can do.
- If employees are driving company cars that they sign out as needed, a standard may be that the car is returned with a full gas tank.
- You can replace these with standards that actually fit with your organization. If you have not set standards yet, perhaps now is the time to do so.

ACTIVITY 2 - DRAFTING STANDARDS

Set up a draft set of standards for the following items:

Answering the phone:

Returning voicemail messages:

Dress while at work:

Providing coffee to visitors:

SESSION SEVEN: THE THIRD CRITICAL ELEMENT – CULTURE

WHAT DO YOU THINK?

To truly embrace providing top customer service, it must become part of the culture of the organization. Culture is defined as a set of shared attitudes, values, goals, and practices that characterize an institution or organization. First-rate customer service must become a company-wide mindset. The customer service philosophy of an organization must be instilled in every employee, with buy-in from everyone.

If a company makes a commitment to providing excellent customer service, that commitment must be demonstrated by our employees, from the front-line people right up to the CEO. When the commitment is only demonstrated by some employees, customers will sense that there is a gap and their experience with the company will be diminished.

Creating a customer service culture involves:

- understanding what an organization stands for — its goals, mission, and vision
- establishing expected behaviors that are attached to the organization's values
- training
- building a solid foundation with a good understanding of meaning and purpose
- promoting the organization's customer service philosophy through encouragement, reinforcement, and support.

Both a focus on customer service and having procedures in place, which were the first two critical elements, contribute to an organization's culture, and alignment with personal values is also needed.

QUIZ

	YES	NO
1. Do people usually buy from someone they dislike?		
2. Do you understand the power of a smile?		
3. Do you show sincere interest in your customer and engage in preliminary small talk?		
4. Do you treat new customers differently than existing customers?		
5. Are you aware that a negative first impression may turn a prospect off of your product?		
6. Do you open with a sincere compliment?		
7. Do you promptly offer a prospect refreshment and a comfortable place to sit?		
8. Do you pay attention to what you wear and how you look?		
9. Do you welcome visitors with a warm greeting and/or firm handshake?		
10. Are you congenial no matter what the outcome?		

SESSION EIGHT: THE FOURTH CRITICAL ELEMENT – PROBLEM-SOLVING

SEVEN STEPS TO CUSTOMER PROBLEM SOLVING

While many problem-solving methods exist, let's look at a specific process that we can use to resolve a customer's problem. This one should be simple and easy to do:

1. Express respect
2. Listen to understand
3. Uncover their expectations
4. Repeat the specifics of their problem
5. Look for possible solutions
6. Take action and follow through
7. Double check for satisfaction

ACTIVITY 3 - CASE STUDY

Select one of the situations below and think about how the service provider could respond in a more customer focused way to enhance their satisfaction.

Explain your solution and add to your portfolio for this task.

Situation One: Happy Burgers

Jane is working at Happy Burgers alone one night. A customer comes in and orders a Super Smiley Meal. This customer then changes his mind and wants a Beamer Special. He then changes his mind again and wants a Smirky Sundae. He becomes frustrated because Jane cannot get his order right.

Situation Two: Your Bank

Sam walks into the bank one day to take money out of his account. The teller informs him that that account has been closed due to suspicion of criminal activity. Sam becomes very upset and demands to speak to the supervisor, who is not in.

Situation Three: Acme Widgets Inc.

On her way to work, Erin stops in at Acme Widgets to pick up her company's order. She is told that their order has not been received and will need to be placed again. This is the fourth time that this has happened this year and Erin is not happy.

Situation Four: Fresh Veggies

Tom is planning a big birthday dinner and goes to Fresh Veggies to get everything he needs. He is particularly excited about the fresh wangleberries that the store's flyer promised. However, when he arrives at the store, there are none to be found. A cashier tells him they are out of stock.

Situation Five: Leaky Pipes

Jacob hires a plumber to fix his leaky bathtub. He leaves the room to let the plumber do his work. He returns to the bathroom to find the plumber asleep in the bathtub and the work uncompleted.

SESSION NINE: THE FIFTH CRITICAL ELEMENT – MEASUREMENT

TOOLS TO USE

It would be great if all of our customers were happy and we did not have to deal with complaints or problems. The only way to know what is really going right and wrong is to measure regularly. When we rely on our memories, we can let a lot of things slip away.

Critical Evaluation

You can measure a particular service or product in great detail. Follow up with customers and ask what is working, what can be improved, and how much they like it. Also ask what could be done differently to develop options. Then assess the advantages and disadvantages to determine whether it makes sense to make changes.

Informal Surveys

Ask your customers what they want. Ask them how you are doing. If you ask the same questions from one year to the next, you can compare periods of time. Offer your customers a gift to thank them for participating.

Focus Groups

These usually have eight to 10 participants who are pre-screened for subject matter experience. During the focus group, a moderator discusses specific issues with participants. These are very structured sessions, and after group discussion, the moderator produces the results in a report format. Do not try this if you have not participated in one or done sufficient research into focus group structure, questioning, and analysis. If done well, expect to get lots of detailed feedback and to have a very good understanding of what the group thinks.

Brainstorming

Everyone in the group makes suggestions and shares ideas. All ideas are considered. Ground rules establish that there are no poor or stupid ideas. No critical comments are allowed during the brainstorming activity. The point is that although an individual idea may not be feasible, someone might use that idea and expand on it to create a fantastic idea.

Benchmarking

Study how others in the same type of industry carry out their business and use their ideas if they apply. Otherwise, you will have to do some in-house research, or measure yourself at a particular

time and set your benchmarks from there. Benchmarking is helpful whether you are looking at systems, processes, or methods.

ACTIVITY 4 - MEASUREMENT IN PRACTICE

In order to know what is happening in our organization, we need to measure our results. We also have to make sure that we are measuring the right things. We have provided some examples below. Your task is to suggest the best measurement technique(s) to help solve the problem. There should be at least two techniques suggested for each problem, with your rationale for each. Place in your portfolio to send in for review.

Situation One

Happy customers will return to our company again. How will we know our customers are happy with our products and services?

Situation Two

We introduced a new product six months ago. It is selling well; we sold 90 per cent of the first run within 90 days, but those are the last statistics gathered. However, production costs are increasing, which will narrow our profit margin. Do we continue to produce and sell this product?

Situation Three

Our call center staff tells us that callers are complaining because they have to wait on hold for too long before speaking to a representative.

Situation Four

Our front counter staff has been asked by customers to add chairs to the waiting area so that people can sit and wait instead of standing in line. The staff has also been told on “many occasions” that the parking lot access is poor, with concrete steps and uneven pavement.

SESSION TEN: THE SIXTH CRITICAL ELEMENT – REINFORCEMENT

REINFORCEMENT TECHNIQUES

Once an organization decides how they are approaching customer service and makes a commitment to their processes, they must live up to the expectations that they have subscribed to. Just as important, those practices must be reinforced.

If you are receiving pay (hourly, salary, or by commission), then you are getting paid to do your job, and that is often reinforcement enough to deliver what is expected. Sometimes companies will put enhanced reinforcement in place by doing things such as:

- Having customers complete a survey about the service they received
- Having supervisors observe when we do good work and provide some kind of recognition
- Celebrating when targets are met, like an increase in returning customers

All of these activities are a way to reinforce our commitment to providing excellent customer service. They reflect the relationships we build within the organization and with our customer base.

DEVELOPING AND MAINTAINING RELATIONSHIPS

Relationships are the key to a functional, positive team. Developing and maintaining relationships with your team members involves several key factors.

Clear Expectations

Every partner in a relationship has certain expectations of other partners. Most expectations remain unspoken until they have been violated. One way to develop and maintain effective relationships is to make your expectations of one another clear.

Recognizing the Reciprocal Quality of Relationships

We can use the reciprocal nature of our relationship with others to establish interpersonal cooperation and trust. Remember two clichés: “It is a two-way street,” and, “You only get back what you give.”

Understanding Different Communication Styles

We can communicate more successfully with others and establish more meaningful relationships if we not only understand others' styles but can also attune our styles to theirs.

RECOGNIZING THE POWER OF YOUR BEHAVIOR

The secret to success is not very hard to figure out. The better you are at connecting with other people, the better the quality of your life. Is there a natural talent for getting along with people, or is it something we can learn? The truth is that it is a bit of both.

Connecting with other people brings infinite rewards. Connecting is what our ancestors were doing thousands of years ago when they gathered around the fire to eat woolly mammoth steaks.

LIKEABILITY WORKS

No matter what you do or where you live, the quality of your attitude determines the quality of your relationships—not to mention just about everything else in your life. The good news is that attitudes are yours to select. And if you are free to choose any one you please, why not choose a really useful attitude?

In face-to-face situations, your attitude precedes you. It is the central force in your life—it controls the quality and appearance of everything you do.

SESSION ELEVEN: COMMUNICATION SKILLS

Yesterday we learned about the six critical elements of customer service. Today we are going to talk about how to improve our customer service skills. This begins with how we communicate.

DEFINING COMMUNICATION

What is communication? It is more than just sending and receiving messages; it is about understanding those messages. There are lots of things that can get in the way of understanding a message, such as:

- Noise
- Language
- Culture
- Disinterest
- Experience
- Education
- Emotion
- Vocabulary
- Mood

Here are two tips for removing those barriers.

- **Empathy:** Make a conscious decision to try to understand. We often talk about empathy as taking off your own shoes to walk in someone else's. This helps you to understand where they are coming from and to set aside your judgments or biases in order to give your full attention to the other person.
- **Rephrasing/Reframing:** This technique gives you a chance to think of your response. It also allows you to demonstrate that you understand while putting it into words that you can relate to.

Remember the saying: "We have two ears and one mouth so we can listen twice as much as we talk."

BODY LANGUAGE BASICS

Much of our face-to-face communication is through body language. While we deliver a message through words, we are also emphasizing, confirming, or even negating what we say through our tone of voice and our non-verbal body language.

Facial Expression

This needs to be pleasant, or at least neutral. The face should be relaxed instead of tense to convey that you are comfortable with your role.

Smiling

Smiles are always welcome and help people to relax. When we are tense, however, our smiles can look like grimaces. Practice smiling in a mirror and get comfortable with offering more smiles. This shows that you like what you are doing.

Eye Contact

When you speak with people, your eye contact needs to be steady and confident. Do not stare people down but do look at them. While there are cultural aspects to eye contact, it is our position that you need to look at people so that they see you are being genuine and honest. Also, if you are nervous you will tend to blink more frequently which can make it look like you have something to hide. Try to relax so that you blink at a more normal rate.

Overall Message

This needs to be welcoming, confident, and comfortable. Even if we are incredibly busy, our body language should show that we are interested and focused on this conversation with this person at this time. Leaning into the conversation, avoiding distractions such as phone calls or people at the door, controlling nervousness, all convey positive messages through our body language.

VOICE

Your attitude is projected through your voice as well as your body language. Make sure your body language always says, "I am here to help as best I can."

When your voice is annoyed, impatient, or condescending, the other person may become angered or angrier. Speak with a calm, firm, caring, soothing tone. Your communications will be more relaxed, more pleasant, and better understood.

The speed and rhythm of your speech is important as well. Clear communication includes appropriate pauses and inflections to support the words being said.

Here are some tips:

- As people talk to you, say to yourself: "Which means that..."

- Be clear in your own mind what you hope to achieve.
- In sales or when dealing with problems, take the lead in conversations wherever possible. This gives you the psychological advantage, putting you in a stronger position to direct the conversation along lines that are favorable to you.
- Check your understanding with your six helpers: why, what, where, when, who, and how.
- Talk less than you listen.
- Try silence.

ASKING QUESTIONS

We spend a lot of our lives asking and answering questions, but we are not always aware of how we ask questions. Open questions in particular often give us difficulty, which is unfortunate since they are the most important ones for us to become skilled at using.

Closed questions can be answered with a single word or two or a simple yes or no. They can begin the closing process in a conversation, or provide confirmation of a detail, but they do not usually lead to gathering more information. Where most people need more practice is asking the **open question**, those where the listener is given a chance to explain, to tell how they feel about an issue, or offer suggestions.

Open questions give us more information because:

- They encourage other people to talk
- We get opinions and ideas from others
- They can help us determine if people have interpreted what we say correctly
- They can help us arrive at consensus much more readily

Good open questions include:

- “What is your opinion?”
- “How do you think we should solve the problem?”
- “What would you do in my shoes?”
- “Tell me more about...”

Note: Be very careful about “**why**” questions. All too often these questions sound like accusations, and the listener immediately becomes defensive.

It is **easier to build relationships** with potential customers if we become skilled at asking questions that give us more information about that person and their wants and needs. The questions help us

find common ground with someone, show the person we are interested in them, and we put the emphasis on them rather than on ourselves.

Good **customer-focused questions** can include:

- What do you think we can do about this?
- What would you like me to stop doing?
- Would it be helpful if I...?
- Supposing we were to...?
- Help me understand where you are coming from?
- Can we set a time to talk about the changes we are prepared to make?
- I am prepared to... Would that ease the situation?

EMPATHY

The Importance of Empathy

We can do a lot to keep problems from happening in the first place. If you develop your **empathizing** skills, you can put yourself in the other person's shoes. This does not mean that you have to agree with them, but it helps you see where they are coming from.

If you are practicing being empathetic (and we recommend that you do) you should avoid phrases such as, "I agree" or, "Yes, that is true." Do not reinforce a concern, either. You can express your empathy by **rephrasing** the key topic of the person's statement. Some phrases you might use include:

- "I hear..."
- "I understand..."
- "I think you are saying..."

Rephrasing before answering gives you:

- A chance to empathize with the concerns
- An opportunity to show the person that you understand the concern
- A moment to think of an appropriate response

It is also important to check that the other person is satisfied with your level of understanding or your explanation. Your ability to empathize will play an important role in your overall communication skills and your ability to foster a positive and productive environment.

DANGEROUS MISCONCEPTIONS

Although we believe that we are being clear when we speak, we are not always being as efficient as we think. Here are some important misconceptions for you to keep in mind when you are having a conversation:

- People always pay attention when you are speaking to them.
- When people say they are paying attention, they really are.
- When someone says, "I know," they really do.
- Saying something over and over will ensure that your listener understands.

POWER TALK

Phrases for Customer Service Success

Ten Most Helpful Phrases

1. I care.
2. I would like to understand. Help me to understand.
3. How are things with you?
4. Let's define the problem.
5. This is what I heard you say.
6. Let me put this another way.
7. How can I help you? Can I do anything to help?
8. What would you do?
9. Thank you.
10. Silence, with concern.

Ten Least Helpful Phrases

1. You should not feel that way.
2. Why did you do/say that?
3. That is not important.
4. I know exactly how you feel.
5. I know what you are going to say.
6. How come you are not as good as...?

- 7. Do you want to know what I think? Here is what you should do.
- 8. I told you so.
- 9. Any phrase that contains the words always, never, all the time, everyone or permanently.
- 10. Silence without concern/indifference.

HOW TO FEEL POWERFUL IN YOUR POSITION

What comes out of our mouths can strengthen our relationships with our customers or weaken our place in their heart. Along with our knowledge, skills, abilities, and a willingness to provide excellent customer service, the words we use with our customers are so powerful that they can build or destroy relationships.

Power Talk Examples:

- “That may be so, but....” can be changed to “That may be so, and...”
- Instead of “I disagree,” how about, “I understand. Let’s consider another viewpoint.”
- Change, “I think I got that” to, “Let’s verify that.”
- Change, “I am so sorry, I am afraid I have forgotten your name,” to, “Hello I am.....”

Whether at work or in your personal life, people who make things happen learn how to phrase their words, so they are encouraging and decisive. We can project positive expectations, both in ourselves and in others, by remembering some basics of good communication.

Project Positive Expectations

If you are going to say...	Try instead...
I will have to	I will be glad to
I will try	I will
I would hate to	I want to
I cannot	I have not yet, and I can
If you can	When will you
This is a terrible problem	This is a challenging opportunity
I am never any good at ...	I am improving at....
I will spend time/money	I will invest time and money

That is impossible

That can be done

Give Credit Where It Is Due

If you are going to say...	Try instead...
I really just got lucky	I planned well and worked hard
I have never done this before	This is an opportunity to learn
I am getting too old	I feel good. I have lots of experience.
They did a good job	You did a good job!

Rebound from Failure

If you are going to say...	Try instead...
I failed	I learned
I can see negative consequences	I can see positive consequences
I am a loser	I am a winner

Accept Responsibility

If you are going to say...	Try instead...
They make me so mad	I feel mad when
I do not have enough time	I can manage my time
It is the other guy's fault	It is my responsibility
Someone else will do it	I will take care of it myself
I cannot change things	I choose to make the best of what is

SESSION TWELVE: TELEPHONE TECHNIQUES

TELEPHONE BASICS

One of the most important things to remember about telephone communication is your **tone**. In significant (though often misinterpreted) research, **Albert Mehrabian** found that when it came to discussing emotions, only seven per cent of the speaker's message was communicated by words, and that tone of voice was responsible for about 38 per cent of the meaning, and body language was responsible for about 55 per cent. This means the words themselves played only a very small part in conveying meaning. In other conversations (not the ones about emotions), we know that tone of voice and body language still have a significant influence on meaning.

Your Initial Greeting

Identify the organization, the department, yourself, and then offer to help. Be careful about verbal shorthand or internal jargon. Do not make the caller say, "Is this Velsoft?" or "To whom am I speaking?" Try to make the telephone experience easy for your caller.

Personalizing Service

All customers are important. Together, they represent the sum total of our reason for working where we do. However, each individual customer craves to have their uniqueness recognized and acknowledged in the process of being served. We can appreciate each customer's importance by knowing and using their name.

A Formula to Practice

- Prepare to hear the name.
- Write it down immediately. If you miss it, ask the person to repeat it.
- Ask, *"Let me be sure I have spelled your name right. Is that J-a-y-s-o-n?"*
- Repeat the name immediately in your next comment to the person.
- Use the name occasionally in the conversation. It is an attention getter at the beginning of the sentence.
- Thank the person and use the name again as you are parting.

Addressing a Person

Should you call a person Mr., Ms., or Mrs., or use their first name? It really depends on the company and whether you have spoken to this person before. Usually, it is best to err on the side of caution and use "Mr." or "Ms." until the customer says otherwise. Remember that the

expectation may be different depending on your industry. Know what is appropriate and endorsed within your company.

Your Telephone Voice

Keep these tips in mind for a pleasant telephone voice.

- Speak at the right volume, neither too loudly nor too softly.
- Do not talk too quickly.
- When you start working with a new or unfamiliar phone system, practice. Telephones distort sound to varying degrees, so you need to adapt your speaking voice in order to be understood.
- If you are using a headset, practice with a colleague so you can set the microphone volume at the right level.
- Use a pleasant, friendly tone.
- Speak clearly and pronounce your words carefully.
- If you have an accent that customers or clients might have trouble understanding, spell things out or use simpler language to make sure they have it right.
- Last but not least, smile! Customers can hear a smile through the phone.

Your Listening Ear

Never interrupt. Wait to be sure your caller is finished before you start to talk. However, do not hesitate to ask your customer to repeat anything you do not understand. Repeat important information that they give you, such as numbers, spelling of words, important names, cities, and streets.

Listen for the caller's mood to try to determine not only what they are saying, but how they feel about it. Remember the importance of asking questions until you are sure that you understand the problem or have as much information as possible.

Your Format for Closing

If necessary, summarize the main ideas of your call by confirming details discussed or follow-up actions promised. Rather than just saying, "Goodbye," try to close with a friendly, courteous phrase such as:

- *"Is there anything else I can do for you?"*
- *"It was nice talking to you."*
- *"Thank you for calling."*

- *"Thanks for your help."*

HANDLING EVERYDAY REQUESTS

There are some situations to keep in mind that can influence how the call unfolds:

- The person they want is not there.
- You have to transfer a call.
- You have to put a caller on hold, get information, and return to the line.
- You have to take a message.

Transferring Telephone Calls

An impression of poor service and lack of interest often results when calls are transferred improperly within an organization. A call should only be transferred when the person transferring it cannot help the caller and is reasonably sure the person to whom the call is transferred will be able to help the caller.

The reason for the transfer should be explained, along with the name of the person to whom the caller will be transferred. This prepares the caller for what is about to happen and does not look like you are giving them the run-around. This is known as a **warm transfer**.

Here is an example: *"Mark Jenson in Fire Prevention handles that. I will transfer you to him, Mrs. Smith, if you will just hold the line."*

Then the person transferring the call should announce the call to the person receiving it. This will prepare him and eliminates the need for the caller to repeat information.

Putting Callers on Hold

If you are handling a call and you must put the caller on hold, ask their permission and explain why you are putting them on hold. You should also give them your best estimate of how long they will be on hold. Remember that you are asking permission and not making a statement; if they do not want to be put on hold, you need to keep the call open.

If you think the waiting time might be more than three minutes, give the caller the option of holding or having you call back. Waiting time always seems longer than it actually is.

Progress Reports

A progress report means informing the waiting person what progress is being made on the call. Here is an example: *"Mr. Johnson, I am still checking the code for that. Do you mind waiting a little longer, or should I call you back?"*

Proper Return to the Line

Attract the person's attention by thanking them for waiting and using their name or a suitable expression. Example: *"Thank you for holding, Mr. Leonard. I have the information that you were asking for."*

TAKING A MESSAGE

Taking a message for your supervisor or another employee should be relatively simple. However, a great deal of business is lost each year by incomplete or forgotten messages. A courteous person returns telephone calls, but only if they get the correct message.

Taking Messages Accurately and Completely

- Keep a notepad handy.
- Write while you are on the line. Take notes as you handle the call, not after you hang up the receiver.
- Request, rather than demand, information. Consider the value in saying, *"May I have your name, please..."* rather than the more common but very curt, *"What is your name and number?"*
- Verify spelling.
- Get the person's first name, too.
- Spell names out phonetically if they are difficult.
- Give feedback for verification. (For example, "So that is spelled J-a-y-s-o-n?")

What to Record

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

Other Tips

To ensure the accuracy and completeness of a message, consider the following suggestions:

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

When asking to take a message, if the caller says, *“No, I will call back,”* courteously ask one more time. For example you could say, *“If I could just tell him who called, I am sure he will be interested. Of course, you can call back if that would be more convenient.”*

TIPS AND TRICKS

Do’s and Don’ts

Do Say...	Do Not Say...
He is not in his office at the moment.	He has not come in yet.
She is away from her desk at the moment.	She is on her coffee break.
He is out of the office until tomorrow.	He left early today.
She is not in the office today.	She is sick today.
He is out of the office for the next two weeks.	He is on vacation for the next two weeks.

Phrases to Avoid Using

- *“I believe he/she went to the toilet.”*
- *“He is taking a nap right now.”* (This actually happened. The man had had a heart attack and his physician ordered him to rest 45 minutes after lunch each day, but this information should not be given to the caller.)
- *“She has a doctor’s appointment this afternoon.”*
- *“He is at the bank.”*

Sentences That Damage Your Image or Lose Goodwill

- *“I cannot put your call through unless I can say who is calling.”*

- *“I do not have anything to do with your problem.”*
- *“He is busy. Would you call him back?”*
- *“I am working with someone right now. Could you call back?”*
- *“There is nothing I can do about it – that is our policy.”*
- *“We might have it, but I do not know for sure.”*
- *“We are getting ready to go home. Would you call back in the morning?”*
- *“I just came in. Could you call back in about 15 minutes?”*

Remembering and using these telephone techniques will enable you to give the same exceptional service on the telephone as you would give your customers and clients in person.

SESSION THIRTEEN: DEALING WITH DIFFICULT CUSTOMERS

REDUCING CONFLICT

Conflict occurs when the emphasis is on the differences between people. The more divided you seem to be, the more differences there are. You get along better with people when the emphasis is on similarities. The difference between conflict with a friend and conflict with a difficult person is that with a friend, the conflict is tempered by things you have in common. Obviously, then, reducing differences is essential to your success in dealing with people you cannot stand.

Here are some key tools for reducing conflict.

Blending

Blending is any behavior by which you reduce the differences between you and another person in order to meet them where they are and move to common ground. Blending increases your rapport with others. For example, have you ever been in conversation with someone when you unexpectedly discover that you both grew up in the same place? In that moment of discovery, differences were reduced and you felt closer.

Or you go to a restaurant with a friend, look at the menu, and ask, “What are you having?” Your question may have had little to do with menu choices and a lot to do with sending a signal of friendship.

You blend with people in many ways. You blend visibly with your facial expression, degree of animation, and body posture. You blend verbally with your voice, volume, and speed. And you blend conceptually with your words.

As natural as it is to blend with people you like or with people who share similar objectives, it is equally natural not to blend with people whom you perceive as difficult. The failure to blend has serious consequences, because without blending, the differences between you can become the basis for conflict.

Here are some examples of blending in a conflict situation.

Example 1

Customer: You people keep messing up my computer. I have had it in here twice since I bought it and it still is not working.

Help Desk Technician: I am sorry your computer still is not working. When mine is not working, it is so frustrating. Waiting to have things fixed, especially when they are new, is even more frustrating. Let me try and help you today.

Here we demonstrate blending with the statement, *“When mine is not working, it is so frustrating.”*

Example 2

Customer: I ordered those winter tires weeks ago! I cannot believe that they are not here yet. You must not have ordered them.

Helpful Tire Technician: I am really sorry about the delay. Now that winter has arrived, I know I would want my tires, too. I can see here that they were ordered five weeks ago. Let me track the shipment and see where they are, or what the delay is.

Here we demonstrate blending with the statement, *“Now that winter has arrived, I know I would want my tires, too.”*

Redirecting

Redirecting is any behavior by which you use rapport to change the outcome of your interactions and reach a more satisfactory outcome. Blending always precedes redirecting, whether you are listening to understand or speaking to be understood.

Identify Positive Intent

We can define positive intent as the good purpose meant to be served by a given communication or behavior. Our failure to recognize and appreciate positive intent can have lasting consequences.

A powerful key to bringing out the best in people at their worst is to give them the benefit of the doubt and assume a positive intent behind their problem behavior. Ask yourself what the real purpose might be behind a person’s communication or behavior and acknowledge it. For example, someone may be upset because they have not received the service they required. They may be difficult toward you and make personal remarks, but the positive intent behind their words is that they do not want special treatment, nor do they necessarily mean ill toward you. They just want to get what they asked for.

If you are not sure about that positive intent, be creative and make something up that could be true. Even if the intent you ascribe to the behavior is not true, it will allow you to blend and develop rapport.

Identify Highly Valued Criteria

Criteria are the standards by which we measure whether ideas are good or not, the means for determining what a thing should be, and the benchmark by which people gauge whether they are

for or against an idea. Criteria become especially important when differing ideas or points of view are being discussed.

Money, bonding, teamwork, or increasing knowledge are some of the things that may be important to us.

Whenever a discussion starts to degenerate into conflict, try to ascertain the reasons why people are for or against something. Then look for an idea or solution to the problem that blends these criteria together. That is another way to turn conflict into cooperation.

When Discussions Degenerate Into Conflict

When your problem person is talking:

- Blend visibly and audibly
- Backtrack or echo some of their own words
- Clarify their meaning, intent, and criteria
- Summarize what you have heard
- Confirm to find out if you understand correctly

While blending is an important skill to use when dealing with others, never blend with a hostile gesture directed at you. Do not meet aggression with aggression. If the other person raises their voice or shakes their fist, the key to blending is to underplay it assertively.

Your action plan for angry, aggressive people should include:

- Holding your ground and use deep breathing to stay calm.
- Interrupting the attack by repeating their name several times.
- Quickly backtracking or echoing their main point to show them you have been respectfully listening.
- Aiming for the bottom line by taking ownership and expressing the situation from your point of view.

Some more important points to keep in mind when you are dealing with difficult people:

- No one cooperates with anyone who seems to be against them. In human relations there is no middle ground. Unconsciously, people want to know, "Are you with me or against me?" That is one of the things you have in common with your difficult people.
- Express your truth in a way that builds someone up rather than tears them down.
- Use "I" language, because "you" statements can be accusatory.
- Be specific about the problem behavior.

- Show them how their behavior is self-defeating.
- Suggest new behaviors or options.

Perhaps the biggest obstacle to being honest with someone is concern about hurting their feelings. But you do no one a favor by withholding information and allowing them to continue behaviors that do not work for them either.

SESSION FOURTEEN: DEALING WITH CHALLENGES ASSERTIVELY

AN ASSERTIVENESS MODEL

One difficulty we can face in our customer interactions is the need to act assertively. Being assertive is not natural for some people. It can cause anxiety for the person responsible for customer service. However, sometimes customer demands really are outrageous or cannot be met. Sometimes they are rude and we must intervene assertively in order to resume a sense of calm and professionalism, either in the workplace or over the telephone.

Speaking assertively does not mean being aggressive, angry, or disrespectful. Assertive behavior means standing up for your personal rights, and acting in direct, honest, and appropriate ways that express your thoughts, feelings, and beliefs without violating others' rights.

There is an assertiveness formula that can help when we are not sure how to tell others how we think or feel and how we would like them to behave. There are several variations to this formula, and the formula does not work in all situations, but it can be useful. When using the model, you will frame your conversation in the following way:

- When you (specific behavior)
- I feel (specific feelings)
- I would appreciate it if you (suggested change of behavior)

Example: "When you come into our restaurant and yell at me to get you a good seat, I feel like you expect me to ignore the lineup that is here in front of you, and I feel embarrassed. I would like you to acknowledge me, say good morning, and then wait your turn like everyone else."

Think of situations where you could use this formula. Practice the wording to yourself, and then try it out in a fairly non-stressful situation and see how it works. Like most things, it gets easier with practice, and feels more natural with time.

You do not have to act assertively in every situation, and this formula is not the only way to deal with difficult or stressful situations. For example, most of us hate being criticized, but rather than become defensive, or react assertively, allow the criticism to prick your curiosity. Ask questions like, "Why do you feel that way?" or, "What exactly do you mean when you say I am not playing fair?"

SESSION FIFTEEN: DEALING WITH DIFFICULT PEOPLE

GETTING TO THE HEART OF THE MATTER

Despite our best efforts and our good use of customer service techniques, our attempts can seem to be for nothing. Behaviors we thought we had influenced positively (or corrected altogether) can regress.

For example, your manager might have spoken with an employee (not you, of course!) about some below-par behavior: perhaps they are always late for work, despite the fact that they are supposed to be answering phones and greeting visitors promptly at 9:00 a.m. The manager has spoken with the employee, and although this will lead to improved behavior for a few days, he always slips back to being late.

WHAT IS MISSING?

They are not getting to the heart of the problem. It is not enough to tell the individual that they are breaking the rules, or that a colleague has to cover their tasks when they are late. If it were enough, the behavior would stop.

You can learn a lesson from this that will help you help customers. Ask yourself what is really bothering *you* to get at what is really bothering *them*. Often the behavior touches a nerve that is much more personal. For example, if you do a favor for a friend, and then they demand more from you, you may feel that they are taking advantage of the relationship. That is at a much deeper level than just the rules that are being broken.

If the person is perpetually late because they do not set their alarm (and get up to it) because they really do not care about their job, or they feel underutilized, or they are being bullied by a co-worker and cannot drag themselves into the office, then we are getting at the root of the real problem.

The ability to peel an issue back to its core takes patience and precision. Sometimes we do not do this because it can take time to uncover the real problem. We can often find ourselves in too much of a hurry to do this properly. At other times, our emotions get involved and we make a decision that we really do not want to go there because we will also have to deal with what is bothering us.

If you do not stop to think about the big picture, you will end up either missing the problem or going after too many problems at once. To stop yourself from being over-involved, you must be able to state the problem in a single sentence. If you make it longer, your conversation will lose focus as soon as it starts.

THE THREE F'S

To get to the heart of the problem, evaluate the 3 F's: **facts, frequency, and frustrated relationship.**

Facts

What are the facts of the issue? Create a list so that you do not get sidetracked while you plan your conversation. Do not drag in other stories or unrelated issues that have happened previously. If you are talking to someone about a shipping problem, stick to that and leave quality or customer service issues out of it.

Frequency

Make sure you have a very clear history of the frequency of the issue and any patterns. For example, if they say they have called the customer service line “tons of times,” get an exact number, with dates and times if possible.

Frustrated Relationship

If your real concern is about the relationship, but you only focus on the pattern, then you are not likely to get the change that you are aiming for. You have to discuss what is important to you in terms of the relationship. Remember: the ability to peel an issue back to its core takes patience and precision.

THE RECOVERY PROCESS

Once a customer problem is identified, the service recovery process should begin. Not all of the six steps described below are needed for all customers. Use what you know about your products and services, and what you can discover about your customers' problems, to customize your actions to the specific situation. One size does not fit all.

You should always take immediate steps to solve problems. The sense of urgency you bring to the problem-solving tells your customers that recovery is important to you and to your organization.

Apologize.

It does not matter who is at fault. Customers want someone who will acknowledge that a problem occurred and show concern.

Listen and empathize.

Treat your customers in a way that shows you care about them as well as about their problem. People have feelings and emotions. They want the personal side of the transaction acknowledged.

Fix the problem quickly and fairly.

A “fair fix” is one that is delivered with a sense of professional concern. At the end of the day, customers want what they expected to receive in the first place. The sooner, the better.

Offer atonement.

It is not uncommon for dissatisfied customers to feel injured or put out by a service breakdown. Often they will look to you to provide some value-added gesture that says, in a manner appropriate to the problem, “I want to make it up to you.”

Keep your promises.

Service recovery is needed because a customer believes a service promise has been broken. During the recovery process, you will often make new promises. When you do, be realistic about what you can and cannot deliver.

Follow up.

You can add a pleasant extra to the recovery sequence by following up a few hours, days, or weeks later to make sure things really were resolved to your customer’s satisfaction. Do not assume you have fixed the problem. Check to be sure.

SESSION SIXTEEN: REFLECTIVE PRACTICE

CONDUCTING A REFLECTION

Reflective practice is a method of studying your own experiences to improve the way you work.

Reflection involves describing, analyzing, and evaluating our thoughts and actions. It can help us improve our problem-solving skills, which is an important proficiency for providing excellent customer service.

There are a number of ways to conduct a reflection, including Gibbs' reflective cycle, Johns' model for structured reflection, and Borton's framework for guiding reflective activities.

Donald Schon, in his influential books *Educating the Reflective Practitioner* and *The Reflective Practitioner: How Professionals Think In Action*, introduces the notions of 'knowing-in-action', 'reflecting-in-action' and 'reflecting-on-action'.

Schön's reflection process involves:

- Knowing-in-action
- Reflection-in-action (thinking on your feet)
- Reflection-on-action (retrospective thinking)

Taking Schön's method a step further, we will add:

- Talking to peers

Schön describes reflective practice as a method by which people become aware of their implicit knowledge base and learn from their experience. Schön felt it was necessary to ponder actions in order to gain new insights on different aspects of the situation. Otherwise we continue to use the strategies that are familiar to us.

Reflection-in-action is a conscious effort to think about behavior as it happens. We can consider what was positive or challenging, and how actions might be done differently next time.

Reflection on action involves reflecting after the event, to review, analyze, and evaluate the situation, thereby turning that information into knowledge.

Schön also talks about "knowing-in-action" to describe tacit knowledge.

Talking to peers: This involves dialogue with co-workers, peer research, and literature reviews, which can help generate other ideas.

EXTRA INFORMATION

Reflective Diary

To make the most effective use of reflection-on-action, the use of a Reflection Diary is suggested. In this diary the description of the event is recorded as soon as possible after it occurs. It can then be reflected upon later (either alone or with a mentor).

If approached with an open mind this reflection can elevate one's thinking toward critical analysis, synthesis, and evaluation. What is learned through this reflection-on-action can then become part of the potential decision-making repertoire when reflecting-in-action!

The reflective process can be used:

- To describe and evaluate key events in your work
- To engage in concentrated evaluation of recurring themes
- Reflect on what may have become habitual
- Develop and appraise actions taken

Reflective Questions

The following is a set of questions that can be used to assist your thinking:

- What exactly was my action/decision?
- What was I trying to accomplish when I did that?
- Why did I decide to do that particular action?
- What was I trying to achieve?
- What were my reasons for doing that?
- Was this action/decision consistent with past experience?
- Was I successful?
- Why do I think I was successful or unsuccessful?
- What there something else I could have done?
- Could I have dealt with the situation any better?
- Would I do it differently next time? If yes, how would I do it differently? If not, why would I not do it differently?
- How do I feel about the whole experience?
- How did the other person(s) feel about it?

- How do I know the other person(s) felt like that?
- Has this changed the way in which I will do things in the future?

More information

For more in-depth information about some other methods of reflective practice, visit:

- [Gibbs \(1988\)](#)
- [Borton's Framework Guiding Reflective Activities \(1970\)](#)
- [John's Model of Structured Reflection \(1994; 1995\)](#)

SESSION SEVENTEEN: DEALING WITH STRESS

ABOUT STRESS

Dealing with difficult people can be stressful, therefore in this session we will look at how to manage stress.

Stress can be positive and negative, but too much negative stress can take a toll on our mental and physical health. When we channel the energy from stress in positive ways, we can accomplish things that we never imagined. When a lot of negative stress builds up, we can have trouble getting our work done, feel unusually tired, and lose our usual motivation. If stress seems to be wearing you down and you are having trouble bouncing back, you may need to consult your doctor. For the usual day to day stressors that we encounter, here are some quick, easy ways you can lower your stress levels quickly.

Deep Breathing

Loosen your clothes, close your eyes, mentally relax your body, and take 10 or more deep breaths. Your goal is to breathe into the bottom of your lungs (where the oxygen is readily absorbed), not the usual upper lung breathing we do. Put your hand on your stomach and feel it move as you breathe in in order to make sure you are getting the air in good and deep. We call this **diaphragmatic breathing** because you are using your diaphragm muscle to breathe. When people are experiencing anxiety they are most often breathing into the upper area of their lungs rather than the bottom.

Each time you exhale, count silently: “one,” after the first breath, “two,” after the second breath, etc., up to at least 10. If you lose count, or find yourself working on thoughts as they pass through your mind, start your count over again. When you are finished, you should feel more calm and relaxed. (Your blood pressure will go down temporarily, too.) If you are in a meeting, on the phone, or dealing with a customer, count in your head.

Visualize

Use positive imagery to boost your mood and enhance your visible performance. In your mind, picture a place that you love. Feel the sunshine on your face, or the breeze on your skin. See the things that you enjoy in great detail. If you are getting ready for a presentation or an interview, visualize yourself performing it perfectly, so that when you get to the event your mind thinks you have done it before. (This is a technique used by athletes and peak performance coaches.)

Music

Music has the power to soothe or to give us energy. It actually has healing power, too. Find a type of music that relaxes you, and play it when you need to calm down. When you feel tired and listless, play some rousing music (rather than relying on caffeine or other stimulants) to give you a pick-up.

Acupressure and Massage

Holding a fingertip to the point of most pain or tension and pressing very hard into the offending muscle for up to a minute can avert a headache or relieve tension. Have a friend or spouse learn how to do massage therapy and/or acupressure on tense muscles, since daily treatment is better than once or twice a month.

Laughter

Laughter is the best medicine of all. A good belly laugh can lower blood pressure, slow your adrenaline, and reverse the stomach acid that comes with negative responses. Be on the lookout for jokes and cartoons you can share with family and friends. For a smaller dose, find a cartoon or picture that always makes you smile and post it near your desk. (Just make sure it is appropriate for all audiences!)

Replace Worry with Problem Solving

Focus on what you can do, and then go ahead and do it. Chronic worriers tend to focus on what they cannot do, what should be happening, or how things are going wrong. Replace worry with problem solving so that you identify where you can step in. Then, stop waiting for the perfect time and just get on and do it.

Meditation

The purpose of meditation is to free your mind from its normal busy activities. There are several different techniques that can be used. Some people use a word as a focal point (a mantra), while others suggest you focus on a color, your breathing, an abstract concept, or an object.

Here is a good process for meditation. Sit quietly with your eyes closed and relax all your muscles from head to toe. Become aware of your breathing. Breathe through your nose easily and naturally, in and out... Begin to silently repeat the word you have chosen or focus on the color you have chosen. In and out... Let distracting thoughts pass through your mind. Continue doing this for 15 to 20 minutes.

Resilience

Each stressful experience that you have prepares you to deal with one in the future. The more resilient you become, the less of an impact each of these events has on your mind and body. Many of us go to great lengths to avoid stress, and although avoidance initially feels like you are doing

alright, the reality is that stressful things come up in our life all the time. The better we are at handling them, the more resilient we become, and the healthier we can be.

Each stressful experience can lead us into a cycle of confusion and even anguish. If we stay with those feelings, however, things actually get worse. But if we make a decision to deal with those circumstances by problem solving and adapting, we develop resilience. This means that we can enjoy life more and be more successful.

As you encounter more stressors in life (and we all do), we can rely on the experience we have had in dealing with negative circumstances in order to cope. We get more effective at managing that cycle of confusion and anguish, problem-solving, adapting, and moving on.

RECOMMENDED READING LIST

If you are looking for further information on this topic, we have included a recommended reading list below.

Anderson, Kristin. *Great Customer Service on the Telephone*. American Management Association, 1992.

Benjamin, Susan F. *Perfect Phrases for Dealing with Difficult People*. McGraw-Hill, 2008.

Blanchard, Ken, and Sheldon Bowles. *High Five! The Magic of Working Together*. William Morrow, 2000.

Bramson, Robert. *Coping with Difficult People*. Dell Publications, 1988.

Carnegie, Dale. *How to Win Friends and Influence People*. Pocket Books, 1998 (Reprint).

Hsieh, Tony. *Delivering Happiness – A Path to Profits, Passion, and Purpose*. Business Plus, 2010.

Weinzweig, Ari. *Zingerman's Guide to Giving Great Service*. Hyperion, 2004.