
Contents

Before you begin	vii
Topic 1: Establish contact with customers	1
1A Acknowledge and greet the customer in an appropriate manner	2
1B Maintain personal dress and presentation	13
1C Use appropriate interpersonal skills to communicate with customers	17
1D Maintain sensitivity to customer needs	24
1E Establish rapport with customers	27
Summary	30
Learning checkpoint 1: Establish contact with customers	31
Topic 2: Identify customer needs	35
2A Determine customer needs by questioning and listening	36
2B Assess customer needs for urgency	42
2C Provide customers with information about available options	45
2D Identify personal limitations in addressing customer needs and seeking assistance	49
Summary	54
Learning checkpoint 2: Identify customer needs	55
Topic 3: Deliver a service to customers	61
3A Provide prompt customer service	62
3B Provide information regarding problems and delays	73
3C Communicate with customers in an appropriate manner	76
3D Identify opportunities to improve the quality of services and products	79
Summary	85
Learning checkpoint 3: Deliver a service to customers	86
Topic 4: Process customer feedback	91
4A Recognise customer feedback promptly and handle comments sensitively	92
4B Record accurate feedback and communication between customers and the organisation	105
4C Identify any unmet customer needs	114
4D Assist customers to make contact with other services	123
Summary	125
Learning checkpoint 4: Process customer feedback	126

Greet and acknowledge face-to-face customers

The first interaction between you and the customer is the greeting; this sets the tone for further communication.

Every customer – existing or potential, external or internal – should be greeted promptly in a professional welcoming manner. This initial communication must provide an acknowledgment to the customer that they, and their communication, are important.

Generally, customers give their name and say why they are visiting or calling the organisation. If a customer has an appointment, contact the appropriate person and either direct the customer to them, take the customer personally, or politely ask the customer to wait.

Here is an example of a face-to-face conversation with a customer.

Person 1 (customer): 'Hello. My name is Roger and I'd like to speak to someone in the sales department.'

Person 2 (staff member): 'Good morning, Roger. I can certainly help you with that. Please follow me to the sales department and I'll introduce you to one of our helpful representatives.'

Person 1: 'Thank you.'



Use your voice

The way you say something can be as important as the words you actually use. The tone of your voice, the speed at which you speak and the volume and pitch of your voice all affect the impression you make on your customer.

When talking with customers, use a positive language and tone of voice. By the end of the day, you may be tired and may not feel enthusiastic or patient. However, maintain your professionalism and remain positive.

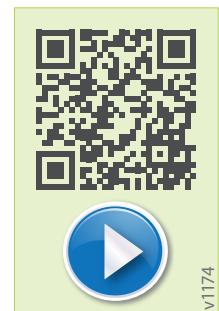
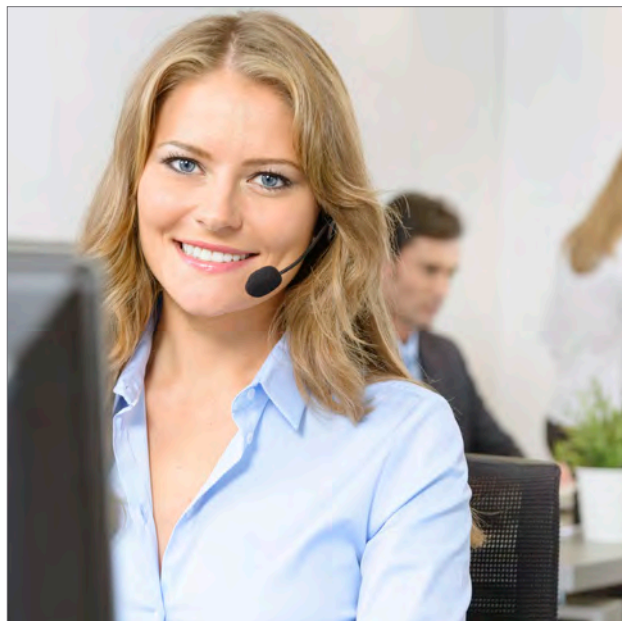
Below are some examples of positive phrases to use and negative phrases to avoid when talking with customers.

Positive phrases	Negative phrases
<ul style="list-style-type: none">• 'Yes, I can certainly do that for you.'• 'I'm sure I can arrange that. Just a moment and I'll find out for you.'	<ul style="list-style-type: none">• 'We can't do that.'• 'I'm not sure about that.'

Refer customers

If you need to refer a customer, always tell them what you are doing. For example, 'Mr Singh, please hold for a moment while I obtain the number for you'.

If the person the customer wishes to see is unavailable, explain the situation to the customer and then suggest another person who may be able to assist.



1B

Maintain personal dress and presentation

Employers expect their employees to be presentable and to maintain an acceptable standard of professional appearance. Acceptable means being neat and clean, in both personal hygiene and dress style.

The way you dress depends on the type of business your organisation operates in and the customers it deals with. For example, some organisations require you to wear a uniform and some have strict rules that discourage staff from wearing piercings or unusual clothes. Other organisations are more informal and are happy as long as staff are neatly dressed.

Standards of presentation may be documented in a policies and procedures manual under 'dress code'. This code describes the minimum level of presentation required. Some organisations may not have a written dress code, but expect you to know what the dress standards are. Before starting any job, make sure you know the organisation's requirements.



Project a good image

Every time you speak to a customer, talk with your supervisor, attend a meeting or conference, or deal with a supplier, you present an image of yourself and your organisation. As an employee, it is your job to always present yourself in the best possible way.

Build meaningful relationships

Using interpersonal skills leads to meaningful relationships with customers and assists you to meet their needs.

Make interpersonal skills an integral part of everything you say and do. It is important that you are aware of the importance of these skills and aim to consciously develop them over time. Thinking about how you interact with friends, about your previous work experiences and about how other people interact helps you develop your own interpersonal skills.

Below are some ideas about building meaningful relationships.



Be clear

- Use clear communication techniques such as active listening and appropriate questioning, summarising and rephrasing to ensure understanding.



Be honest

- Display integrity by being honest and following ethical values and principles.



Be respectful

- Identify and respect the needs of others and be aware of people's feelings.

Rephrase

Rephrasing is another way of making sure you understand what your customer is asking. It means putting what you think the customer is saying into your own words. You can keep doing this until you are both satisfied that you understand each other.

However, when thinking about questions you could ask, remember this – do not rush in before the customer has finished what they want to say. People can get very annoyed if they are interrupted.

Below are some examples of rephrasing.

Examples of rephrasing

‘So you would like me to book your car in for a service on 3 May at 10.30 am. Is that correct?’

‘I’ll just repeat what you’ve said, so I know I’ve understood correctly. You’re happy for us to send you what we’ve got now and let you know when the rest comes in?’

Integrity and respect

If people feel you are being dishonest or less than honest with them, they will soon decide to take their business elsewhere. Trust is essential. If people think you lack integrity, they will assume the whole organisation does too; otherwise you would have been dealt with by your supervisor.

Respect for others is a basic interpersonal skill and there are times when you need to be sensitive to the particular needs of your customers.

You should be open and honest. This may put you in some difficult situations if your organisation as a whole does not work this way and may cause you to compromise your values.

A lack of integrity can be displayed by:

- trying to force a customer to take a product or service they clearly don’t want, just because you need to sell more of it
- pretending a product or service does things it does not do
- promising things you know you cannot deliver
- doing things that are not in the best interests of a customer.

Tips to build rapport

Building a good relationship with a customer also means doing a bit extra for them. Once you have established a good rapport with a customer, you can build on this by maintaining communication with them.

Tips for building good rapport with customers

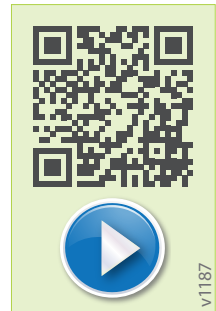
Let the customer know that they can always contact you personally whenever they need information.

Telephone customers to let them know some information; for example, that a special or a new product has just come in.

Make sure a customer request is handled properly.

Follow up any queries to make sure the customer has been satisfied. For example, if you referred the customer to a colleague, check that the issue was resolved.

Make a note of the customer's personal information, such as whether they are married. Include this in your conversations.



Use questioning and active listening

When receiving a request, listen carefully so as to understand exactly what is being asked. Identifying what the customer needs is an important skill. Often a customer asks for information and this seems like a straightforward request. However, by asking questions it may become apparent that the customer really wants something different or they need more information.

If the customer has written, faxed or emailed your organisation, you may need to telephone them to clarify exactly what they want.

Ask yourself questions like these to establish what the customer wants.

What does the customer want?
Is the customer asking for general information about the organisation?
Does the customer want information sent to them?
Does the customer need information about discounts, or a new product or service?
Does the customer need to speak to someone in another department?
Does the customer need promotional material?

Good questioning techniques

Ask questions to find out precisely what the customer wants. A customer may not know what is available from the organisation and so may ask for more details about products or services. Explain to the customer what information is available and what can be sent to them. Sometimes a customer may ask you to send them information about a specific product without knowing there are other products and services that may better suit their needs or that an improved service at the same price is now available.

Ask questions if the customer has not provided information. For example, your supervisor may have asked you for your industry's latest employment figures, which your organisation keeps on a central database. The database has a range of employment figures divided into gender, age, type of work, weekly and monthly breakdowns, etc. In this case, you would have to ask questions to find out exactly what figures your supervisor needs.

Improve your performance

It is also important that you continually improve your performance by taking control of your own learning and seeking ways to develop or learn new skills. Self-management is a crucial skill in today's business environment and one that employers value highly.

Seek learning and development opportunities whenever possible.

Improve your performance

It is also important that you continually improve your performance by taking control of your own learning and seeking ways to develop or learn new skills. Self-management is a crucial skill in today's business environment and one that employers value highly.

Seek learning and development opportunities, such as the examples below.

How to seek learning and development opportunities

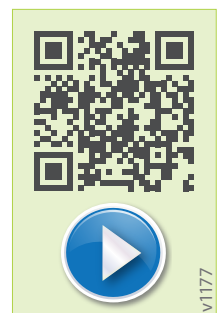
Watch how experienced staff deal with customers and observe the strategies they use.

Take action to improve using feedback received from your manager.

Discuss ideas you have to improve work practices with your manager at your performance appraisal sessions.

Identify professional development opportunities such as attending conferences, taking short courses or enrolling in a course that leads to a qualification. You can do this by researching on the Internet, asking colleagues, or by reading course information.

Seek a mentor to guide your career.



Price

Many organisations have a price list that details the cost of all products and services offered. Most organisations also list the prices on the product's order form. You need the most current price list to provide the correct information. Prices may change from time to time for many reasons. There may be specials on a certain range of products or a price increase. Some organisations have a website that shows a current price list.

Sometimes it is necessary to get more information from a customer before a price can be provided. For example, your organisation may have a discount for bulk purchases so you need to know the quantity the customer requires.

Here are some other factors relating to price.

Prices relevant to external customers	Prices relevant to internal customers
<ul style="list-style-type: none"> • Cost of products • Cost of services • Discount for bulk purchases • Cost price for suppliers 	<ul style="list-style-type: none"> • Stationery • Office equipment • Travel • Accommodation

Product availability

Knowing the availability of products and services is very important. You need to give customers the exact details of the availability of items.

What you should know about product availability
<ul style="list-style-type: none"> • Products that are in stock and products that have a waiting time of days or even months. • Whether a single item will be available but a bulk product order will take longer. • Whether a product may only be available in certain areas. Generally this information is written on the product catalogue. • Whether the organisation offers services outside business hours. Customers may want to make an appointment to organise a quote for a service.

Payment and delivery details

Organisations have policies and procedures for receiving and making payments, forwarding information and handling a product. This includes packaging, delivery and mailing details, as well as the most appropriate delivery method (a courier service, personal delivery or email). Different organisations have different payment and handling methods. You need to know who is responsible for the delivery of products so an inquiry can be redirected if the customer wants more information.

3B

Provide information regarding problems and delays

Problems or delays are a common feature of everyday business and customers expect them to be acknowledged promptly. Responsibility for the problem or delay should be taken by the organisation and a reasonable solution offered.



Deal with problems and delays

Problems and delays can occur when fulfilling all sorts of customer needs. Problems could be anything from a product not being available, parts not in stock or a wait for the service to be provided to the appropriate person not being available to provide the specific information or advice.

If a customer becomes emotional or angry that you cannot meet their need immediately, listen to what they have to say and avoid becoming defensive or putting the blame on someone else.

Remember, in some cases you can regain, maintain or increase customer satisfaction by handling problems and delays extremely well.

Be courteous

Being courteous is showing regard for others in manners, speech and behaviour. The saying 'Treat others the same way you want them to treat you' is a worthwhile reminder when dealing with customers. Even if you are having a bad day, an effort needs to be made to deal with customers in a courteous manner.

Here are some points to remember when dealing with customers.

Focus your attention

Focus your full attention on your customer, not just when dealing with people face-to-face but also on the phone. Phone customers can detect when you are not giving them your full attention.

Watch your tone of voice

Watch the tone of your voice and avoid speaking in a condescending way or using a sarcastic tone.

Use body language

Make your body language match your words.

Ask questions

Ask the customer how they would like a problem to be resolved. If they insist on being unreasonable, politely repeat what you can do for them.

Remain calm

When dealing with complaints, remain pleasant, caring, patient and sympathetic.

Display friendliness

Display friendliness and be approachable. However, being friendly does not mean being overly familiar. Even if a customer is upset, do not touch them.

Example: present ideas in a written proposal

Suggestion to re-assess the layout of the shop floor for the Fabulous Frock Shop

Reasons for suggestion

- In the last fortnight I have noticed many customers browsing for a few minutes and then coming to me or other customer service assistants to ask where the ZAC brand of clothing is located in the shop. This brand has been advertised in our latest catalogue and the advertising is bringing many more customers to the store, but they cannot find the stock.
- All of the customer service assistants feel that they have not been provided with adequate information about the sale and other items mentioned in the catalogues, and are not able to provide the customers with details such as lay-by, deposit required, stock numbers and transferring from other stores.

Suggestion

I suggest that when brands such as ZAC are advertised in the latest catalogue, we:

- re-assess the placement of brands on the showroom floor
- put the brands that are mentioned in the catalogue or are on sale in a prominent place on the showroom floor
- brief all customer service assistants on the specials and featured catalogue brands, before they are displayed, in such things as number of articles available for sale, lay-by and return policy on sale items and any other information related to catalogue items.

Benefits for the customer

- they don't waste time looking for brands
- it reduces their frustration
- it provides more confidence in the customer service assistants
- they are happy and satisfied.

Benefits for the organisation

- increased sales and profits
- increase in return customers
- benefit gained from catalogue
- happy, confident and competent customer service assistants.



Topic 4

Process customer feedback

Feedback is the term used to describe the comments an organisation receives from its customers about the customer service the organisation provides, the organisation's products and services, or a situation the customer has experienced when dealing with the organisation.

An essential part of any business operation is to gather the feedback received from customers. This feedback is crucial to the success of a service-oriented business and allows an organisation to ensure that the service being provided to customers is meeting their needs.

Feedback needs to be followed up and dealt with promptly. Therefore, it is vital that customer service employees recognise feedback when it appears, as it comes in many different forms and from a wide range of sources. Organisations will have procedures to guide you when recording and dealing with customer feedback and communication.

In this topic you will learn how to:

- 4A Recognise customer feedback promptly and handle comments sensitively
- 4B Record accurate feedback and communication between customers and the organisation
- 4C Identify any unmet customer needs
- 4D Assist customers to make contact with other services

All employees have a responsibility to be familiar with the various types of feedback their organisation receives so they can respond to it in an appropriate way. Every time an employee handles a customer's feedback, they are contributing to the customer's perception of the organisation. Good customer relations are developed from the day-to-day treatment of customers' comments, complaints and suggestions.

Compliments	<p>When customers believe that an organisation has given them excellent service or they are delighted with a product, they sometimes contact the organisation and tell them. They might write a formal thank-you letter or telephone to express their appreciation personally. You'll often receive a compliment on the spot: 'Thanks for phoning your other store. That's saved me heaps of time.' Your colleagues might also pass on compliments. For example, your supervisor might praise you for putting in an extra effort to make sure a catalogue went out on time, or for the way you handled a customer's request. Team members might thank you for completing your part of a project on time.</p>
Testimonials	<p>Some feedback is given in the form of a testimonial. This is a formal statement written by a customer that compliments the organisation, such as 'Watson's Removalists helped our company move with a minimum of fuss. We'd certainly use them again'. Many organisations use testimonials in their marketing campaigns.</p>
Advice, suggestions or opinions	<p>Customers often pass on advice or give suggestions. For example:</p> <ul style="list-style-type: none">• 'The conference was great but next time it would be better if each session was longer.'• 'I think it would be a good idea if you packaged the pens as single items rather than in packs of five.'• 'Have you ever thought of having some quiet music playing while shoppers browse? It's always very quiet.'• 'I think our team is working well, but perhaps we can use everyone's skills more.' <p>This type of feedback is useful because it might highlight something your organisation has not thought about before.</p>
Surveys and questionnaires	<p>In many instances organisations specifically ask customers to provide feedback to them in the form of surveys, questionnaires and customer satisfaction cards. This is often the best way of finding out what customers really think about your organisation.</p> <ul style="list-style-type: none">• A card might be included with each product, asking customers what they think of the product they have just purchased.• A questionnaire might be distributed after a conference, seminar or training session the organisation has presented to see what people liked, what they didn't like and what could be done to improve future sessions.

Ask the right questions

Encourage customers to explain the problem and what they would like to happen; don't rely solely on the complaint form information. Ensure that you clearly understand the complaint.

Use questions that start with what, when, how, where and why.

What

Example: What did you do when the problem started?

When

Example: When did the problem start?

How

Example: How would you like me to help?

Where

Example: Where would be the best place for someone to come and see you?

Why

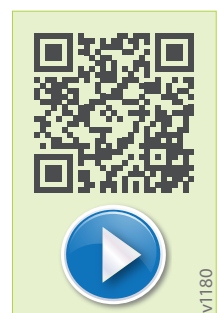
Example: Why do you think the problem started?

Apologise

Apologise sincerely for any inconvenience caused. Even if the customer's complaint is not justified, make a good impression by showing concern. Your supervisor will be able to help you with some standard phrases to use when apologising.

Some standard phrases to use may include:

- I'm terribly sorry for the inconvenience.
- Thank you. This issue has made me quite upset.
- I'm sorry this has upset you. I understand what you are saying.



Practice task 14

1. Consider the different types of customer feedback provided in this table. How would you respond to each item of feedback?

Type of feedback	Example	Response
Compliments	'I really appreciate the effort you put into making sure I received the goods in time.'	
Complaints	'I'm always kept on hold when I call your organisation.'	
Advice and suggestions	'Will your organisation introduce payment online? It would be so much easier for me.'	
Criticism	'Your products are far too expensive.' 'Every other store I know offers after-hours delivery.'	
Testimonial	'Toby's Tyres always provides top class service – and the best tyres in the business. I'd never go anywhere else.' Mr Blake Fewster, Milltown	
Surveys, questionnaires	A feedback form completed by a participant at a seminar.	

2. Think about a time when you have received feedback from a customer. Outline who the feedback was from and whether it was positive or negative.

continued ...

Record informal feedback

Informal feedback is received from a customer face-to-face, over the telephone or in an email, rather than through a formal process. It is a good idea to get into the habit of keeping a notepad and pen near you at all times. This makes it easy to record any conversation you might have with a customer.

Ensure you record the correct spelling of the customer's name, organisation and contact details. Don't be afraid to ask them to repeat anything that is not clear to you. If you use any personal shorthand, for example 'cus' for 'customers', be sure you write the word fully when you are typing up your notes. Other people may not know what you mean. Use your listening, speaking and questioning skills to identify and clarify the information.

If there is no official form for the type of feedback you are recording, write up your notes in full as soon as the conversation has ended.

You should record:

- the customer's name, spelt correctly
- their organisation (if applicable)
- their contact details
- the date
- the customer's feedback
- your response
- the action/s you will take.

Transfer the information

Depending on your organisation's policies and procedures you might have to transfer the information to a specific feedback form, an online form or a database. Some organisations use a software program that includes a section to record customer comments. Some feedback forms may be coded so the organisation can identify different types of feedback.

Some people prefer to record the essential facts as they are speaking with the customer, then transfer the information into the official form as soon as the conversation has ended. By doing this straightaway, the conversation is clear in your mind. It is easy to forget something if you decide to have a coffee break first or if someone comes to talk to you. Trying to rely on your memory can be risky. It is also preferable to type the feedback, as handwriting may be difficult for other people to read.

Provide explanations to the customer

You may not be able to satisfy all customers. But this should not prevent you from giving them good service.

Often the customer will be disappointed when you tell them you cannot meet their needs. Most customers will accept what you say, but some may become angry or threaten the organisation with a lawsuit. The important thing to remember is to remain calm and be polite. Put yourself in the customer's position and be sensitive to their feelings.

Remain positive

Be as positive as you can in your response to the customer. Explain clearly and in a steady voice why their needs cannot be met at that time. For example, if they have asked about online purchasing – a service your organisation doesn't provide – you may need to tell them that, while the organisation doesn't currently offer online purchasing, it has listened to customer requests and is in the process of introducing such a scheme.

Communicate policies

You may need to draw the customer's attention to your policies. For example, 'I'm sorry we're unable to give you your money back but that was a condition of the sale. However, we could exchange the item for a similarly priced one if you would like.'

Offer alternatives

You will not always be able to meet the customer's needs. However, as a rule, never respond by saying your organisation cannot meet their needs and end the conversation. Talk to them and see if there is another product or service that you do offer, or an arrangement that could be made that might suit their needs just as well. For example, you may not be able to get them an appointment for 2.00 pm but you can give them one for 4.30 pm and tell them that you will contact them if there is a cancellation.

3. Complete the following table.

Situation	Type of feedback	Most appropriate method of response	Why you chose that method
'I'm amazed at being kept on hold every time I ring.'			
'You've got to make sure you plan your work better. This is the second occasion you haven't completed work on time.'			
'Thanks for advising me. You really understood what I was saying.'			
'Why won't your business accept cash? I don't have a credit card.'			