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Greet the customer

No one particular greeting is the most suitable, because customers and contexts differ. However, some common guidelines are standard for acknowledging, greeting and connecting with customers.

Here is an overview of some of the common standards for acknowledging customers.

Acknowledging the customer

You should acknowledge the customer at the first available opportunity. For example, if you are attending to a customer when another potential customer enters the store, make sure you acknowledge them also. This may be as simple as a smile, a nod or saying, 'I'll be with you shortly'. The important thing is that the customer feels noticed.

Addressing the customer

Your organisation may have policies for when and how you should address the customer. This procedure is easier if the organisation attracts an identifiable segment of the market. For example, a surf shop attracts mostly younger people who are interested in surfing. Many customers entering a surf shop would share common values and ideas.

Connecting with the customer

Connecting with the customer is the act of finding some common ground on which to build rapport and empathy. It is important at this point to be natural and sincere, because contrived, insincere comments or behaviour may have the opposite effect of alienating the customer.

Common ground

Creating the right customer connection is vital to a successful sales process. If you are unable to connect with your audience, then it is likely the sale will not proceed. After greeting your customer, you should seek to find some common ground with them. Small talk can support the connection process; topics such as pets, the weather and sport are often useful for creating that common ground or connection.

You also need to be aware that people and situations are not always what they seem, so be very careful when making assumptions about customers.

Topics that help create common ground include:

- customers' children
- an outstanding or unusual item of clothing or hairstyle (compliments only!)
- the weather
- a significant news item
- a major sporting event.

Problem-solving strategies

Salespeople should be ready to deal with communication barriers and apply problem-solving strategies accordingly. They may need to adapt their communication styles or approaches; for example, by using physical demonstrations or images to give and receive information, and by checking that the customer understands the information.

Salespeople need to be flexible, patient and understanding when dealing with customers and show a genuine interest in and enthusiasm for meeting their needs.



Questioning

Questioning a customer is the easiest way to start interacting with them, establish rapport and find out what they need. Questioning is a multi-layered process that involves determining what information you want to obtain, the most appropriate types of questions to ask and what the responses are likely to be. There are two main question types: closed questions and open questions.

Here are some types and examples of questions that can be used to interact with customers and determine their needs.

Question type	Description	Examples
Closed question	Usually elicits only a yes/no answer	May I help you? Do you like the wine? Have you seen the menu? Would you like some more? Are you new here? Can I get you a smaller size?
Open question	Intended to elicit a detailed response	How may I help you? Where would you like that delivered? When would you like to book that for? Why are you returning the item? Who did you speak to? Which store was that? What seems to be the problem? Can you explain ...? Can you describe ...? Tell me about ...?

Ways to update product and service knowledge

- Formal training prior to employment
- Product training provided by suppliers
- In-house training provided by the employer
- On-the-job learning
- Experience gained over time

The decision-making process

Some purchases are routine and made every day, while others may only be made once or twice in a lifetime. Compare buying staples such as bread, milk or fruit with buying a new house or a new car.

The significance of the purchase will affect the amount of thought or consideration the customer gives to the decision. For example, many people take months to buy a new house and may look at dozens of properties. However, most people would simply buy milk or bread without giving the purchase much thought.

Market research tells us there is an identifiable set of processes that most customers go through while making a purchase. Here are some examples of the processes that a customer may go through in making a purchase.

Processes that a customer undertakes in making a purchase

Recognition that there is a need, a deficit or a problem

Environmental scanning – searching for information

Comparison of the available alternatives

Purchase of the selected product

Evaluation of the selected product or service after purchasing

Inform customers of their rights and responsibilities

Federal and state laws, and company policy and guidelines, will influence your contact with customers. To ensure that you meet your responsibilities when selling a product or service, you must be able to describe the product or service as accurately as possible, which includes clearly explaining the organisation's after sales service and warranty policies and procedures.

Remember to treat customers the way you would like to be treated (equally) and honour your organisation's exchange and refund practices.

Here are three ways you can comply with a consumer's purchase rights.

Describe products accurately

It is unlawful to make false claims about a product or service, so do not overstate or exaggerate a product's capacity or capability. You would be breaking the law if you told a customer who was buying a small, basic air-conditioner that the product could function as a heater as well – if this were not the case.

After-sales service

If there are certain conditions that may void a warranty, such as misuse of the product, you must clearly explain these. For example, new cars sold in Australia come with a warranty but this is rarely unconditional. If the owner of the car put oil instead of coolant into the radiator, this would void the warranty because the owner had disregarded the manufacturer's instructions.

Treat customers equally

It is unlawful to take advantage of a vulnerable customer. For example, for customers with hearing or sight impairments, you should select a communication medium that enables them to clearly understand the information being given. It may also be necessary to ensure that someone with limited English language skills fully understands the conditions of a transaction.

Practice task 3

Read the scenarios, then complete the tasks that follow.

Scenario 1

Imagine you work in a hardware store and a customer wishes to return a lawnmower that they purchased last week for a cash refund. The customer claims that the product is faulty, but you can see from damage to the blades that it has been misused.

Scenario 2

Imagine you are the manager of a real estate agency and have shown a rental property to a young woman. A young male colleague who began working in the agency the previous week asks you for her phone number and email address, saying he'd like to invite her to a party.

1. Read Scenario 1. Write down what you would tell the customer to advise them of their rights and responsibilities.

2. Read Scenario 2. Write down what you would tell your colleague and the reasons for your response.

2A

Explain possibilities for meeting customer needs

It is sometimes said that a customer's main priority is to buy a solution to a problem they have. The customer also wants to feel good about the proposed solution to the problem; that is, the product or service you suggest.

By getting to know your customers personally, within professional parameters, you can better meet their needs. These needs are often driven more by emotion than logic, so keep channels of communication open so you are well placed to meet these needs.

Such complex customer needs require the salesperson to develop strong, trusting professional relationships over an extended period of time. The sales process may be long and detailed. Where obstacles occur, you need to be able to identify them, describe their nature, and propose an appropriate and effective course of action to deal with them and so meet the customer's needs.



Identify complex customer needs

The key to identifying any customer needs is listening carefully. Focus your attention on the customer and concentrate on what they are saying. Note their choice of words, tone and pace of voice, overall body language and general demeanour. As you gain experience, your judgment in this area will improve. However, do not assume too much about the customer; always clarify information and do not base your judgments on stereotypes.

On some occasions, a customer's need is quite simple and has only one logical solution. For example, a customer wants to buy a low-fat ice-cream, so the salesperson shows them which ice-creams are low-fat and asks which flavour they would like.

However, the customer may have a complex problem with a range of possible solutions. Consider a mortgage broker talking to a couple wanting to buy a home. The broker could suggest a range of home loan products, each with advantages and disadvantages; for example, the loan could be principal and interest, or interest only; it could be fixed or variable interest; a simple no-frills loan or one with redraw and other facilities. Several meetings may be required before the details are finalised and a decision is made.



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Features and benefits

When explaining your product or service to a customer, it is important to make this relevant to their needs. Customers are really interested in how a certain product's features will benefit them. For example, a refrigerator may have a large capacity, excellent energy efficiency and a long warranty period. For the customer, this means they will have plenty of room without higher energy bills and peace of mind that any breakdowns will be covered.

When you describe the feature, link it to the benefit for the customer. Try using the phrase, 'Which means that ...'. For example, 'This fridge has a five-star energy rating, which means that you'll spend less on electricity than with a three-star fridge with smaller capacity.'

Be honest about the features and benefits of your product. If there is a genuine disadvantage with your product, try to overcome this by stating the advantages as benefits and hope that these will outweigh any relative disadvantages. This method can sometimes put the disadvantage into perspective for the customer. For example, 'This fridge is a little more expensive, but it's more energy-efficient so you'll save money over time and have more storage space as well.'

Organisation procedures and standards

If an organisation is serious about meeting and exceeding good customer service standards, then it needs a way to measure the quality of the services provided. Service standards and procedures need to be documented and easily accessible to all workers.

An example of a SMART organisational standard is a telephone policy. The phone should not be allowed to ring more than five times and all workers have responsibility for answering the phone.

Where standards do not comply with the SMART model, it is unlikely the organisation will be able to live up to them for any length of time.

S

Specific: Target and clearly define a specific area that you want to improve.

M

Measureable: Suggest an indicator of progress; quantify if possible. Determine how you will know the goal has been achieved.

A

Attainable: Agree what the goals should be and keep them achievable in the time frame.

R

Realistic: Identify what results can realistically be achieved given the available resources, knowledge and time.

T

Time framed: Specify when the result can be achieved; make sure there is enough time to achieve the goal, but not too much time.

Customers' buying signs

Other useful strategies include making eye contact when appropriate, nodding, using acknowledging words/phrases such as 'Yes' and 'I see', taking notes and asking relevant closed questions to narrow down product options.

Adapt your strategy to suit the customer interaction. You may vary your style based on the customer's age, gender or cultural background. It may also depend on the type of transaction. Your communication style will vary for each of these methods. Listening to the customer is the most important thing you can do when providing customer service.

The information that follows provides examples of different purchasing methods used by customers.

Different purchasing methods
<ul style="list-style-type: none">• Face to face• Online shopping• Telephone shopping• Mail order catalogue shopping• Voucher redemption shopping

Build trust

Trust is an important component of the sales relationship. Most of us would not go to a hairdresser if we did not trust them, for fear of emerging from the salon with a style we did not like. We would not eat at a restaurant if we did not trust its hygiene practices or take our car to a mechanic we did not trust.

You can build trust by being open and honest with your customers and consistently providing reliable, quality service. Customers are most likely to trust an organisation, and its products and services, if there is frequent interaction and the vendor exhibits consistent and predictable behaviours. Trust can also be instilled if the vendor gains a reputation for consistently fulfilling customers' expectations around product or service performance.



2C

Determine and prioritise preferred actions

Any transaction can take many different directions; the more complex the transaction, the greater the range of possibilities. If you are working on a complex sale, you may need to explore several options and carefully consider their pros and cons. You may also need to consult with both the customer and your colleagues.

Remember that your ultimate goal is a win-win situation where the customer's needs are met and you make the sale. If you can assist the customer to add value in some way, you may also establish a long-term commercial relationship.



Communicate your preferred actions to the customer

Before a sale is finalised, you must ensure that you and your customer have reached a satisfactory understanding. You will need to do several things to successfully close a sale.

When closing a sale, you need to make sure that:

- the agreed price of the product or service has been ascertained
- any additional cost (tax, postage and handling, currency exchange etc.) has been communicated
- acceptable methods of payment have been established
- the date that payment is due is clear
- the date, time (may be approximate) and place of delivery have been clearly communicated
- the method of delivery has been established
- unloading arrangements have been made
- the quality of the product has been confirmed
- return or refund facilities have been sighted by the customer.

Document the sale

All of the relevant details are usually be set out in a sales contract. In the commercial world where complex sales are transacted, these contracts may be drawn up by solicitors or other trained specialists. The details of some of these sales contracts may be confidential and known only to a few relevant company personnel.

In retail purchases, these conditions may be published on transaction receipts, or in the terms and conditions of sale on a company website. Under law, organisations must display their refund and exchange policy somewhere that customers can see it.

Use conflict management techniques

On some occasions, salespeople must deal with irate customers and difficult situations. When customers become angry, it is best that all employees follow clearly defined procedures and react in a professional manner.

It is easy for employees to become overwhelmed in these situations, so it is important that everyone is familiar with the specific policies and procedures of your organisation. It is paramount that employees who are dealing with angry customers are trained in basic conflict management techniques.

Aspects of conflict management require that you are able to:

- acknowledge the customer's difficulty
- show concern for the customer's feelings
- project professionalism and not become personal
- rephrase and paraphrase the customer's statements to ensure understanding
- provide a clear resolution for the customer
- check the customer has understood the arrangement.

Improve customer service processes

Once customer difficulties have been identified, it is important that employees are made aware of the problem. As a salesperson, you may need to demonstrate to support employees that a real issue is occurring and that the organisation must implement changes if it is to satisfy customers.

You can also discuss the performance of competitors and what they are offering customers in your industry, to show where your organisation needs to improve to compete effectively.

Clearly state to support employees what is likely to occur if nothing is done to improve existing customer service practices; for example, loss of customers, competitors winning business over your organisation, decrease in sales and potential job losses.

If you want to change customer service processes, you must also describe the possible alternative solutions clearly, why they should be considered and what their benefits and disadvantages are. Depending on the audience, you may recommend your preferred solution.

In any case, remember to always take action and identify the problem, echo the problem to other team members and be proactive in suggesting alternative solutions.



3A

Establish effective regular communication with customers

For sales professionals, every sale should be viewed as an opportunity to add to your professional network. However, for a customer to willingly offer contact details, they need to feel at ease with you as a salesperson, as well as with the organisation you represent. Putting them at ease is likely to make a customer receptive to communication, which, if handled correctly, can lead to the development of an ongoing business relationship.

Regular communication

Once you have established contact with a customer, you can reinforce this relationship via regular communication to maintain the connection. Be careful not to overwhelm the customer with too much communication, but offer links to specials or loyalty programs that will benefit them.

Regular communication also helps build rapport, which occurs when people have some common interests, beliefs or attitudes. For example, your children may go to the same school or play in the same sporting club. Building rapport helps establish a trusting professional relationship and a sense of loyalty between customers and salespeople.

The advantages of regular customer communication include:

- developing and maintaining a bond with customers
- creating a sense of loyalty
- having customers spread the good word – the best kind of advertising
- strengthening your brand identity
- putting you in a position to upsell or cross-sell
- having your organisation become a supplier of choice.



Use technology to understand customer service needs

Organisations need to use business technology and resources to ensure information about customer service needs is collected, processed, structured and presented in an effective manner. Business technology can help you analyse data collected on customers in order to identify trends in customer service needs, and to share and communicate this information with colleagues.

The best technology for you to use to collect and distribute information on customer service needs will depend on the resources you have available.



Online services

The internet and web-based delivery of products and services have radically changed the way consumers and businesses interact. Customer service has evolved from a face-to-face, over-the-counter experience and then telephone and call centre transactions to the point where consumers can now easily access goods and services via the internet.

Similarly, computer technology and the internet have revolutionised the way businesses can manage their dealings with customers. Web-based technology and fast, remote connections now allow organisations to provide prompt, reliable service from multiple sites. Support employees now have access to centralised product and customer databases online, and can readily access purchasing, ordering and client account details remotely.

Customers commonly carry out a complete transaction from their home or office, or from their smartphones, including identifying the product or service they want, ordering and payment, and even warranty registration.

This means that businesses with efficient, well-developed, up-to-date and informative websites are able to transact with customers locally, nationally and internationally. Web-based technology also provides businesses with affordable, accessible alternatives for managing customer profiling. Organisations can choose to outsource customer-monitoring activities or even access software such as SurveyMonkey to carry out their own research.

Example: web-based technology

Spreadsheet software can be used to chart annual customer complaint statistics and the reasons behind the complaints received. Tables, charts or graphs can be used to present this information and make data clearer and easier to understand.

This could enable you, for example, to identify that complaints have risen in the past year and the most common type of customer complaint is for late product delivery. Thus, you could identify that customers want shorter delivery times and you could take appropriate action.

Customer service databases or customer management programs, such as Maximizer, can be used to track customer interaction. You can also use such programs to print reports on specific data.

Obtain and retain referrals

Referrals of customers (directed to you) may come from numerous sources. It is good practice when you are aware of a referral from a third party to thank or in some way acknowledge the source.

The best way to ensure continued referrals is to reciprocate where possible. Although some informal referrals may come your way without obligation, if you wish to set up a formal and systematic referral arrangement then you generally need to offer something in return. This could be a commission, a discount, shared use of facilities or a preferred supplier status.

Good referrals are extremely valuable and should not be treated lightly. Record the source of useful referrals and be sure to thank people and businesses that have assisted you.

Referrals can be obtained from:

- existing customers
- a professional or industry association
- a service or recreational club you belong to
- another professional you do business with
- a complementary business.

Example: partnerships and alliances

Many organisations wish to create more formal, sometimes legally binding partnerships with complementary organisations in order to provide a complete service to customers.

The following example outlines how a business uses its external networks to refer customers to other businesses.

The Boat Shed is a small business located on a marina that builds customised boats for sailing, fishing and waterskiing enthusiasts. It specialises in manufacturing the boats only, but often finds its customers require several related products and services. The Boat Shed regularly refers customers to a range of other businesses and organisations, including:

- a welder for trailers and tow-bars
- a marine supplies store for sails and other equipment
- an outdoor store for fishing tackle
- a map shop for marine charts
- the local yacht club.



Market research

Market research is a formal and organised process of gathering and recording data about the market, customers and competitors. The outcomes usually inform business strategy and are part of gaining an advantage over competitors.

Information can be gathered from either primary or secondary sources. Data for market research can be primary (gathered by you) or secondary (gathered by a third party and given or sold to you). Government websites are excellent sources of information and provide demographic statistics such as the population of a region and median incomes.

Gathering primary data usually involves talking to or observing a sample of people. Samples are used because it is not logistically possible to interview or observe all consumers. Ensure the sample is representative of the broader group whose opinions are being sought. Designing survey tools and techniques for this type of research is generally a specialist task and it is unlikely that an inexperienced or novice salesperson would be asked to design a research project.



Internal and external data

Most market research projects begin by analysing available secondary data. This data can be both internal and external to the organisation. Data analysis can be carried out in several ways and is dependent on what information is being sought. Again, this is a specialised task and most organisations wishing to conduct in-depth market research would commission a market research company to design the project and analyse the data.

The following are examples of internal and external data.

Internal data sources	External data sources
<ul style="list-style-type: none">• Company annual reports• Sales and accounting records• Previous market research commissioned or carried out by the company	<ul style="list-style-type: none">• Government data, industry or trade or professional association data, industry reports• Books, academic journals, trade journals, professional journals• Magazine and newspaper articles

Maintain contact

Regular contact is the best way to ensure customer information is current. Use a range of communication techniques so you are able to reach customers by their preferred communication channel, such as email, printed mail or direct telephone contact.

You can obtain information about updates by internet research, reviewing updates from manufacturers and distributors, and cultivating relevant networks. Always consider the primary target customer market/s when developing strategies to improve customer service. If the communication is not relevant to these customers, then develop a more suitable one, rather than wasting resources.

Any marketing activity must be directed at meeting and exceeding the target customers' needs. There are many ways you can maintain contact with your customers. You may want to ask them to advise you of any changes to their personal details, such as their contact details. It is also a great idea to constantly research your product or service, so that you are readily able to share the latest product or service information with your customers.

Obtain customer feedback

The organisation must be clear about its approach to providing customers with the opportunity to raise complaints and provide other feedback. This includes the organisation's general philosophy in this area (how open it is to feedback and complaints), as well as the specific steps that customers may take.

Informal feedback on customer service needs can be obtained every time there is interaction with a customer. It may be as simple as asking, 'Were you satisfied with the service?' after a transaction or asking the customer if they would spend a few minutes answering some questions about the service offered. Customers are often frank and open when asked to comment in an informal, non-threatening manner and the organisation is likely to receive some honest responses. Feedback from customers can also be gathered from telephone calls, emails and letters.

When seeking informal feedback from customers on what they expect from customer service, it is important to adopt the following three effective communication techniques.

Open questions

Open questions allow customers to provide in-depth answers about their needs.

Closed questions

Closed questions guide customers towards issues of concern with customer service.

Summarising

Summarise and paraphrase customer feedback to review what customers have said and to confirm you understood what they have told you.

3E

Maintain records of customer interaction

Maintaining records of customer relationships allows organisations to move from predominantly one-off transactions to repeat business over a longer time period. Customer involvement can be developed and enhanced.

Information technology has allowed more comprehensive and useful databases to be set up and maintained, adding meaning to customer relationship management.



Keeping records

The importance of keeping records has already been discussed. Any record-keeping processes should be explicitly set out in organisation procedural manuals or similar.

When keeping records, make sure all documents clearly state:

- when records need to be made
- what needs to be recorded
- where they must be recorded
- where records and back-up data are kept
- how records are kept
- who will have access to the records
- who will have overall responsibility for managing the system.

Customer relationship management

Traditional marketing is based on a single exchange or a one-off sale. Progressive organisations have moved towards customer relationship management. CRM focuses on customer retention, rather than just a single sale. It is about forging and maintaining long-term relationships that offer a high level of customer service and encourage high customer commitment and empowerment. The customer is seen as a partner and the organisation maintains frequent contact with them and encourages loyalty.

To do this, companies need mechanisms in place to gather, store and analyse customer information. This includes contact data and a history of customer business, including:

- products purchased
- volume or number purchased
- frequency of purchase
- location of purchase
- method and reliability of payment
- other relevant or useful comments.

Customer satisfaction surveys

These surveys are used to collect both qualitative and quantitative data for the organisation in regard to its customer service performance. Unlike feedback forms, which are used continually, a survey is commissioned to question a defined population of respondents (in this case the organisation's customers or potential customers) and obtain their thoughts, opinions and attitudes on a range of issues related to the organisation and customer service in general.

Surveys can be performed once only or intermittently over a certain period of time; for example, every six months. Survey questions are structured and standardised so every respondent answers the same questions in the same way. This reduces bias and the time required to collate results. Surveys are an effective way to solicit customer feedback from a large number of actual or potential customers at once.

Other methods for receiving customer feedback include:

- customer feedback forms
- customer interviews
- focus groups
- toll-free feedback numbers
- suggestion boxes
- mystery shoppers
- secondary research
- third-party feedback.

Other types of surveys

Surveys may be administered by either the researcher or the person completing the survey.

Here are examples of two types.

Researcher-administered surveys

Questions are read to the respondent by the researcher. This has the advantage of the researcher being able to explain any confusing questions, fewer incomplete or missing responses, and the organisation having greater control over the data received.

Self-administered surveys

These are also called questionnaires, where the respondent administers the questions to themselves in their own time. This is less expensive for the organisation, easier to coordinate and can lead to more objective answers from respondents, who may feel less pressure than with a researcher present.

Motivate customers

Motivating customers to respond to your requests for feedback can be difficult: they may not believe their complaints will be taken seriously, they may only contact the organisation if they are upset and have a complaint to make, or they may not want to spend time completing feedback forms or surveys.

If you want customers to rate service performance across criteria that you set, such as the courtesy of employees, product knowledge or complaint resolution, consider asking customers to rate your team from 1 to 5. This type of feedback is a good way to monitor service delivery over a period of time against criteria that reflect the key responsibilities of your team or customer service areas.



If you want general feedback from customers about whether they think you are doing well, consider asking open-ended questions such as, 'What aspects of our service delivery do you believe we could improve?' or 'Please comment on how our customer service levels compare with other organisations you work with'. This type of feedback can be valuable when you want to find out where improvements can be made.

Use of technology

Always work out how results will be captured, recorded and analysed in the early stages of the review process. For instance, you may need to set up a database or spreadsheet that allows you to compare results over time or write up a report on general feedback that has been given.

Consider why the information is being gathered in the first place and then work out how the data should be best stored for analysis and review purposes.

The use of technology is essential in modern management and when collecting information. Outdated paper-based systems no longer meet the demand for the organisation to have the right information at the right time. While collecting of data can be a manual process (for example, customer surveys or mystery shoppers), manual data should then be input into IT systems for storage and analysis.

Technology used to collate feedback

When collating internal or external feedback, it is essential that an organisation uses technology to monitor and report on customer service. There are many types of technology that can help with collecting feedback information.

Types of technology that assist in collection of feedback include:

- websites and online feedback forms
- statistical packages and spreadsheets to analyse customer information collected
- email systems to share information easily between colleagues within the organisation
- databases to effectively store and analyse customer information and provide ease of access when searching in the future
- phone systems to allow customers to provide feedback
- point-of-sale equipment to record sales and profit levels.

Summary

1. Communication with customers should be regular and conducted through suitable channels with the overall aim of influencing the customers and securing future purchases.
2. Establish dynamic networks within and outside your organisation, as well as with customers, to strengthen loyalty and bonds between customers and the organisation.
3. Maintain and record customer and product or service information, ideally in a dynamic CRM system.
4. Ensure that when you are referring customers to a product or service, you are able to supply it. Use professional networks for referrals when you cannot supply a product or service.
5. Keep accurate and current records of all matters related to customer interaction in accordance with your organisation's procedures.
6. Use contemporary technology to provide optimum functionality in data management.
7. Be aware of and guided by all current legislation relating to customer service, customer rights and quality standards.