

Customer Service Basics

LESSON
#12

Study Guide



Business

Soft Skills

Career Enhancement

**A Business Soft Skills lesson
for your career enhancement**



**BUSINESS
SOFTSKILLS, INC.**

Level One / 2.0

“Business SoftSkills Career Enhancement Study Guide”

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“Introduction to Study Guide”

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Lesson #12 “Customer Service Basics”

LESSON #12 “CUSTOMER SERVICE BASICS”

Good customer service can improve your company's bottom line.

This lesson introduces the six basic rules of Customer Service, provides case studies and interactive role playing to teach the fundamentals of dealing with all types of customers. Since it can cost five times more to acquire new customers than retain an existing one, this is an important soft skill for business.

Video Lesson Timing															
VIDEO	Entire Lesson	Open	Intro	CHAPTERS									Exercise	Review & Quiz	Summary
				1	2	3	4	5	6	7	8	9			
Cust Serv Basics	19:09:00	1:10	:53	1:31	2:17	1:51	1:30	4:07						3:20	2:29

Script

["As Spoken" script - not edited for grammar]

OPENING

Hello! My name is Kathleen Stelts and this soft skill lesson is on Customer Service Basics-- Educational level one. The lesson will consist of an opening, the six rules of customer service basics, case studies, and a special role playing segment. It will be followed by a review, quiz, and finally the summary. So, let's get started.

INTRO

We hear more complaints about customer service today than ever before and in this competitive marketplace, effective customer service is essential to the survival of any

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business. You can lose more business due to poor service than from your product quality or cost problems.

Let's look at a few statistics: 68% of consumers leave because they feel they have been treated poorly. It can cost five times more to acquire new customers than to retain an existing one. A recent survey found that maintaining your customer base can avoid losses by 25-85%. So, good customer service can improve your company's bottom line. Since the average business never hears from 96% of its unhappy clients, it is important to help ALL consumers with good customer service. Remember, if a customer is happy with your service they will tell 5 people. If they have problems, they will tell 10 people.

CHAPTER 1

It's time to learn the six rules of an effective and professional customer service person.

Number one is: Have a positive attitude. Working with the public is tough so it is necessary to have a commitment to helping people and solving problems. To be successful at customer service, you must be polite and enthusiastic about your profession. Learn how to see the problem to the logical end which is to have a satisfied consumer. Good customer service advisors are not easily upset by yelling consumers. Surveys have revealed that the main complaint made by people is a lack of politeness by customer service.

It's important to take full responsibility for all elements of your job. If you have a negative, counterproductive attitude of “It's not my job,” you are destined to fail. It is necessary to have a professional, friendly and energetic attitude. When you do, you'll make a positive impression on your clients.

Here is a tip: When you are talking to the consumer, speak clearly but don't sound aggressive. If you are giving complex information, speak slowly so they can easily follow what you are saying. Choose words that convey a positive, respectful and helpful tone. The proper words and attitude will really make the difference.

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CHAPTER 2

The second rule is know your product or service. There are a number of ways to do this. First, if you are lucky, your company has a formal training program when you begin your job. This is the best way to get a good foundation for your organization’s products or services. If they do not have a customer service training program, find out if you can attend the sales training meeting. Sales classes are a great way to understand the “basics” of your company’s products or services especially if no other classes are available.

There is another method to get useful data - talk with your peers. They have valuable information on both the common and unique problems. There may also be situations in which you need to work with other departments. Be prepared before taking calls by having manuals, notes, policies and procedures all available at your finger tips. It is important to find the proper answer as soon as possible. After a while you will be able to create your own database from your experiences and any helpful information you may learn from your consumers.

Listen to the consumer is rule number three. The skilled customer service advisor must know how to listen. It is important to listen COMPLETELY to the customer’s situation. Do not cut them off or jump to conclusions. Consumers want to know they have been heard. They must be allowed to "vent" their pent up frustrations.

Remember, they will NOT listen to you until they have totally exhausted their dissatisfaction. So it is important to listen to the complete story before talking. After that, you should walk them through the process in a step by step format and listen carefully to their answers.

Make sure that you ask questions if there is something you don’t understand. This is vital! Most communication problems stem from a misunderstanding so you need to make sure that this does not happen! Listening to the consumer is the pivotal point to being a successful customer service advisor. Summarize what they have said to you to make sure you fully understand the problem.

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CHAPTER 3

CASE STUDY #410

Here's a case study. Tim was a new Technical Support Service Advisor who really knew his products. After just a few weeks, Tim's supervisor, John, was disappointed to find that Tim was not helping the customers. Customers had to call back and talk to other advisors to get their problems solved. John knew that Tim was more knowledgeable than some of the other advisors but for some reason he was not able to solve problems over the phone. John decided to listen in on Tim's calls to see what was going on. It didn't take long until John discovered the problem. Tim would not listen to the customer's entire story. He kept interrupting by constantly giving possible solutions. After a while, the customer would call back later hoping not to get Tim again. John sat down with Tim and explained the problem and reminded him to follow Rule #3, "Listen to the consumer COMPLETELY." After just a week, Tim's "caller satisfaction rating" began to rise. After a while he was one of the best advisors in the group. All he had to do was to stop and listen to the consumer.

Rule number four is - Maintain communications. You must be able to establish and maintain clear and effective communications. The best way to keep a customer satisfied is to always keep them informed of everything happening. Here is an example. The customer service advisor has told the consumer to expect an answer in 24 hours, only to find out later it's really going to take 72 hours. They should contact the consumer immediately and inform them of the new timeframe. NEVER wait for the consumer to call you after the target time.

CHAPTER 4

Solve the problem is rule number five. The objective of a competent customer service advisor is to solve the problem. This may seem obvious but a lot of people get caught up in the "procedures" and the daily grind and do not completely solve the original problem. Do not quit until the problem solving process is acceptable.

After solving your consumer's problem, always ask if there is anything else you can do for them. On the other hand, if you cannot solve it, move it up the chain of command.

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Remember the bottom line is to get the consumer’s problem solved and have them happy. Be sure to make a smooth transition to the new person and ALWAYS keep the customer informed and in the loop.

The 6th and final rule is always follow-up. One course of action that will set you apart from other customer service employees is to always “follow up.” It’s best to do this within 24 hours after the problem has been resolved. This will do two things. One, it tells the consumer that you and your company are concerned enough to check back. Second, it allows you to verify that the problem has actually been solved. If the problem has not been resolved, some consumers will get so upset they will refuse to call back because they just want to give up. Your call can prevent this situation and will give you another chance to repair the problem if necessary. This will give you a professional and competent image.

CHAPTER 5

Case Study # 411

Let’s look at another case study.

A company that builds test equipment had a client who would not pay a large invoice for a system he purchased almost six months ago. When accounting contacted him he yelled and screamed and said that the system never worked and he was too busy to send it back. The accounting department contacted customer service and asked them to see what they could do. The new customer service manager put Jennifer on the project. She was one of the best customer service advisors in the department.

Jennifer called the client and calmly endured the on-going yelling and screaming. Then she listened to the long story of everything the customer had gone through. Once the customer finally settled down, she asked a few key questions about the problems and acknowledged his replies. After a few minutes she assisted the client, by directing him through the troubleshooting steps. The end result: the system was up and running and the customer was very satisfied.

Jennifer did a follow-up call the next day and again a week later. Every time she called, the client was more receptive and happier. He told her that his company was now more productive. She gave him her “direct” line in case he had any future problems. Not only did the client end up paying his original invoice, he ended up purchasing two additional systems.

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Jennifer had kept her cool, allowed the client to “vent” and worked the problem until it was solved. The end result was a happy customer, open invoice paid and additional systems sold. Jennifer knows and uses the basic rules of customer service.

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Customer Service Role Playing

JENNIFER: Hello and thank you for calling Business SoftSkills customer service. This is Jennifer, how may I help you?

CONSUMER: I still haven't received the DVDs I ordered.

JENNIFER: I am sorry about that sir; may I have your name and purchase order number?

CONSUMER: (Building up to Yelling) - This is the third time I've called and given you that information and nothing ever happens. I don't know where my purchase order is and I just want to know when I'm going to get my DVDs? Can't you people do anything right? What is the matter with you? Are you trying to cheat me?

Kathleen: Well, what would you do if you were Jennifer our Customer Service Advisor: A- Yell Back; B- Just hang up; or C- Listen to the consumer? Let's find out what she does.

JENNIFER: I am sorry that you have had these past problems but I think I can help you today. All I need to get started is your name and address.

CONSUMER: (Calmer, but still upset) Bill Jones 123 Main Street, USA. Zip code 98765.

JENNIFER: (Pause, typing on keyboard) I think I see the problem Mr. Jones. The order was sent to 456 South Street and was returned to us.

CONSUMER: South Street? We haven't lived there in a year.

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JENNIFER: *It appears that the computer was never updated properly. I am putting in the correct address now and will have your order shipment sent out TODAY. You will receive it by 10:00 tomorrow. I am sorry for the confusion. Is there anything else I can assist you with today Mr. Jones?*

CONSUMER: No, thanks for your help.

JENNIFER: *I will call you back in a few days to make sure that you received your order.*

CONSUMER: Wow, thanks bye.

JENNIFER: *Goodbye Mr. Jones.*

<Next day>

CONSUMER: Hello, Bill Jones speaking.

JENNIFER: *Hello Mr. Jones, this is Jennifer from Business SoftSkills. I just wanted to make sure that you got your order today.*

CONSUMER: (slightly excited) Yes, Jennifer it came this morning! Thank you very much. I actually would like to order the next series.

JENNIFER: *Well, that’s wonderful, let me transfer you to our sales department and they can help you with that. Hold on, one moment please.*

KATHLEEN: *It looks like Jennifer understood and used the six basic rules to Customer Service. She got the problem solved and a new order. Good work Jennifer!*

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Review and Quiz

Questions in **BOLD** answers underlined

Now, it's time to get a pen and a paper out. We're going to see a review and then have a quiz on Customer Service Basics. Occasionally you will see a slide with a missing word or multiple choice questions. You will have eight seconds to write the answer before it appears on the screen. Ready? OK, good luck. Here we go into the Review and Quiz portion of Customer Service Basics.

Customer Service Statistics

- 68% consumers feel
poorly treated
- Reducing consumer
defections boost profits
by 25-85%
- Average business never
hears from 96% of its
unhappy consumers

Six rules for
effective and
professional
customer service

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Rule #1

Have a

Positive Attitude

- Be polite and enthusiastic
- See the problem to the logical end
- Surveys revealed that lack of politeness is the major problem in customer service
- **Take responsibility for your job**
- Be professional and friendly
- Speak slowly

Rule #2

Know your

product or service

Lesson #12 *“Customer Service Basics”*

- Use any formal training programs
 in your company
- Attend the
 sales training meeting
- Talk with your peers

Rule # 3

Know how
to listen

- Listen COMPLETELY
 to the consumer’s situation

While the customer is

Talking, you should never:

- A) Ask for more information**
- B) Jump to conclusions**
- C) Let them keep talking**
- D) Wait for them to finish**

Lesson #12 *“Customer Service Basics”*

- Allow them to "vent"
- Walk them through the process in a step-by-step format
- Ask questions
- Listening to the consumer is key
- Summarize so you fully understand the problem

Rule #4

Maintain Communications

You should follow-up with the customer:

- A) Only after they have contacted you**
- B) When you have a solution to their problem**
- C) Before they contact you**

Lesson #12 *“Customer Service Basics”*

- Keep customer apprised
of their status
- Always get back to the
customer when you have promised

Rule #5

Solve the Problem

- Do not quit until you
solve the problem
- If you cannot solve it,
move it up the
chain of command

After solving your
consumer's problem,
always ask if there is
anything else you can do

Rule #6

Always Follow-up

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After the problem has been solved, you should follow-up within 24 hours

- Customer will feel better
- If the problem has not been resolved, you have another chance
- This will give you a professional and competent image

Summary

There is no magic to understanding Customer Service, it's a difficult job. You must keep a positive attitude, know your product or service, listen to the consumer, maintain communication, solve the problem, and follow-up. Those are the simple rules for the basics of customer service.

We know that you are going to run into some consumers who are natural born complainers. But if you apply these rules and go that extra mile for the others, you will have a satisfied customer base. When you go out of your way to make a consumer feel valued, they will remain loyal to you and your organization. Learning these and other soft skills will help you achieve your personal goals. So learn and apply these rules and you will be a customer service superstar!

Good luck and thanks for watching!

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Lesson #12 “Customer Service Basics” Test

True or False

1. Customer service complaints are now declining.....T or F
2. Product quality and costs are more important than customer serviceT or F
3. 96% of unhappy customers never complainT or F
4. Positive attitude is not really needed for customer service.....T or F
5. Always give complex information quickly to save time.....T or F
6. It is important to know your product or service.....T or F
7. Following procedures is more important than solving the problem.....T or F
8. ‘Customer follow-up’ is required of good reps..... T or F
9. Just “hang-up” if a customer yells at you over the phone.....T or F

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10. Few customers will actually leave due to poor customer service..... T or F
11. It is cheaper to get new customers than to keep old ones.....T or F
12. Always see the problem to the logical conclusion.....T or F
13. Do not worry about preparing before taking calls.....T or F
14. Talking to your peers is a good way to learn about your product or service.....T or F
15. Interrupt the customer if you think you know the answer to the problem.....T or F
16. Never ask for training.....T or F
17. It is important to maintain regular communications with the customer..... T or F
18. If you have a problem you cannot solve, move it up to your supervisor..... T or F
19. Some customers are natural born complainers.....T or F
20. Make sure you understand your customer’s situation.....T or F

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Answers

1. Customer service complaints are now declining

FALSE

2. Product quality and costs are more important than customer service

FALSE

3. 96% of unhappy customers never complain

TRUE

4. Positive attitude is not really needed for customer service

FALSE

5. Always give complex information quickly to save time

FALSE

6. It is important to know your product or service

TRUE

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7. Following procedures is more important than solving the problem

FALSE

8. ‘Customer follow-up’ is required of good reps

TRUE

9. Just “hang-up” if a customer yells at you over the phone

FALSE

10. Customers will actually leave due to poor customer service

TRUE

11. It is cheaper to get new customers than to keep old ones

FALSE

12. Always see the problem to the logical conclusion

TRUE

13. Do not worry about preparing before taking calls

FALSE

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14. Talking to your peers is a good way to learn about your product/service

TRUE

15. Interrupt the customer if you think you know the answer to the problem

FALSE

16. Never ask for training

FALSE

17. It is important to maintain regular communications with the customer

TRUE

18. If you have a problem you cannot solve, move it up to your supervisor

TRUE

19. Some customers are natural born complainers

TRUE

20. Make sure you understand your customer's situation

TRUE

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QUICK REFERENCE CARD

[See next page]

The Quick Reference Cards for this lesson are located on the next page. These cards provide the rules and key points of this lesson.

The Quick Reference pages can be printed on a heavy card stock then cut into individual cards for easy access. They can also be printed in the 8 ½ x 11 format and laminated or put into a notebook .

Use them whenever you need a quick referral to key points of this lesson.

**Six rules for
customer service
professionals**

Customer Service Basics

Lesson 12

Level One

1. Have a Positive Attitude
2. Know your product or service
3. Listen to the consumer

**Six rules for
customer service
professionals**

Customer Service Basics

Lesson 12

Level One

4. Maintain communications
5. Solve the problem
6. Always follow up

**Three additional
rules for
report writing**

Customer Service Basics

Lesson 12

Level One

1. Add background information
in order to explain any complex
or unique situations

**Three additional
rules for
report writing**

Customer Service Basics

Lesson 12

Level One

2. Use summaries
3. When possible, suggest solutions
to defined problems