



**Seven Secrets  
of**

**Brilliant**

**CUSTOMER SERVICE**

**G R PHELPS**

# **Seven Secrets of Brilliant Customer Service**

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## **Introduction to Brilliant Customer Service**

We help organisations, big and small, to improve their customer service, support and sales performance. We do this in three ways – by assessing, training and coaching. With over 25 years of experience in designing, developing and delivering customer service training workshops and skills coaching.

### **About Brilliant Customer Service**

Features and benefits of our customer service training, consulting and coaching services include:

- Service Analysis
- Customised Training
- Skills Coaching
- Smartphone e Learning App
- Flexible and cost effective
- Proven Content

### **About the Author – G R Phelps**

Graham Roberts-Phelps is a business skills trainer, consultant, author and professional speaker. Over the last twenty years graham has personally trained or coached over 25,000 business professionals in 30 countries and hundreds of organisations, including many of the world's largest and most successful companies. Brilliant Customer Service Limited

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# The Seven Secrets of Brilliant Customer Service - Preface

*"Customer service is the new marketing."*

## How to compete in the age of Amazon

The ideas in this book have been developed over many years. They started life before the internet revolution that is now an essential part of almost every business and market. In fact, we live in what I call the 'Amazon age'. Even if you or your business does not compete with Amazon and the products and services it provides, your customer's expectations and service standards have been shaped by Amazon.

This short eBook will give you knowledge and ideas to beat Amazon at their own game: Extraordinary service to build long-term customer loyalty.

*"One of the working names for Amazon during the early days was Relentless. This describes their entire approach in a single word."*

Before you start reading, one essential point: Customer service is not just about customers. Customers, in the definition of this book, covers both internal and external customers. Internal customers are colleagues and co-workers, neighbours and people in your community and anyone you add value to or have contact with.

*"Go beyond solving the problem, answering the question or responding to a request, connect with people as individuals."*

## **Becoming Brilliant on the Basics**

*“Always begin with: So that I can better serve you, do you mind if I ask a few questions?”*

Before you start trying to implement the wild and wacky, get the simple essential things right first. The ‘basics’ to become brilliant on include:

1. Communication
2. Personality
3. Loyalty
4. Dealing with dissatisfaction
5. Moments of truth
6. Managing expectations
7. Systems and processes
8. Follow-up
9. Competence
10. Deliver

## **Positive Communication**

Take responsibility for your communication, all of it! That means what you say and how you say. Your tone of voice, body language and facial expression are many times more important than the words you use. You can even say “good morning” and project anger and annoyance.

Always think about what you are trying to achieve when you are communicating. This means not just the end result or objective the emotion you would like the customer to feel. For example, confidence, reassurance, being valued. This means that the purpose of your communication is the response you get back.

When using email or online communications, make your communications friendly and personalised and also short, specific and simple. Make phone and face to face communication clear and friendly. When selling, talk benefits to the customer not product features. Above all make sure speak the customer's language and cut out jargon and use positive phrases that get positive results. These might include:

- I see what you mean
- Let's see what we can do about this
- I would be as concerned as you are
- I'm sure we'll be able to find a solution
- Do you see any possibilities that I haven't considered?
- I can...
- You can..
- I will...
- Will you please...
- Could I ask you to...

## **The Personal Touch - TLC**

*“Trust, liking, credibility.”*

You build a business, one customer at a time; one contact at a time. People like to deal with people they like, know and trust. That is true of individuals, companies and brands. Be friendly but not over familiar. Key points:

1. Tailor and trim choice to what is most appropriate to the individual.
2. Vary your service approach for different customers and types of customer.
3. Always be courteous and be polite.

4. Use the customer's name regularly in conversation.
5. Accommodate customers special requests wherever possible.
6. Get to know your customers, all of them, using tools and technology to help you.

These are the simple keys to building Trust, Likability and Credibility.

## **Keeping customers, your customer**

*“Imagine your customer is your best friend — listen to their concerns, be a shoulder to lean on, and then shift the focus from what went wrong to how you can help make it right.”*

68% of customers go elsewhere because the people they deal with are indifferent to their needs. The cost of attracting a new customer is five times as much as keeping a new one.

What are you doing to keep your existing customers happy?

It is well established that a satisfied customer looks to spend more with that organisation and individual, will prefer to speak to their 'favourite' support staff and give unprompted referrals and positive reviews.

## **Turn complaints into opportunities**

*“Complaints and service problems are opportunities in work clothes.”*

Customer dissatisfaction and physical problems are wake-up calls to let you know something is wrong and how to put them right. Customers who complain are people of value, they want to stay customers and are simply telling you how to achieve it and keep them as customers. Surveys show that customers that have a problem that is put right quickly, effortlessly and above expectations are more loyal, spend more and are more satisfied than if they have no problem at all.

Therefore, welcome complaints and seek out feedback. You can only fix a fault if you know about it. The worse thing is when an unhappy customer or user tells everyone else, except you.

## **Create moments of truth**

Customers are only interested in two things: Solutions to their problems and a positive experience. This includes when researching and buying products or services, as well as being served and supported in a non-sales situation or transaction.

Everything counts, each time you meet or contact (or don't contact!) your customer, your status in the mind of that customer is either improving or diminishing.

*“A moment of truth is whenever you come into contact with a customer or potential customer online, on the telephone, face to face, by email or any other method.”*

Always, focus on how you want customers to feel about your service interaction, brand and products. That is, how they feel when you are dealing with them, using your website or App, when they are using your products or service and when you are not there, or they think about you. The fact is that customers are more likely to remember how you made them feel than what you said or did. Those feelings are key to them returning or recommending you.

*“Customers will forget what you said or did but will remember how you made them feel.”*

By the way, negative emotions are found to be recalled stronger and for longer. This helps to explain why unhappy customers tell more people and feel upset for longer than happy or pleased customers.

## **Exceed expectations by managing carefully**

*“How often do your customers say WOW?”*

The world is full of mediocrity. Anyone can do something a little cheaper or quicker, it takes vision and commitment to make or do something quicker, more consistently with more choice and easier.

Don't do anything if you can't do it excellently! Establish clear expectations and then exceed them.

*"The elephant in the room is that it is okay to say "No" to a customer so long as you follow it with a positive option."*

## **Systems are as important as smiles**

Make quality your number one priority. Customer service and quality should be a part of everybody's job. Lead by example and set quality customer service objectives and goals. Reward customer service excellence.

Real customer service is not just about positive phrases, canned clichés and false smiles. It is about organising people and processes to do things quickly and consistently. Customers seem to be attracted to consistent and uniform experience.

*‘An apple store is more like a fancy hotel or art gallery than a PC tech shop. That is not an accident.’*

## Follow up and follow through

You don't know how well you are doing unless you ask. That means asking at each contact but also in review when appropriate. Try and surprise the customer and show you are interested in their opinion. This directs the attention to the quality of your service. Gives you directional feedback and draws your customer's attention to just how good you really are.

## Deliver

Whatever your promise to your customer, just do it! And do it well and above expectation, every time. This also means that you must aim to be 'better' than your close competitor in how you do what you do. Better is subjective, so aim to be different and are clear to your values and experiences you seek to create.

Whether this is resetting a password or advising on a pension plan, completing a legal service or completing an insurance claim. Competence wins every time. Training is not a cost, it's an investment. Standardise systems to ensure consistency. Think through processes and methods to pre-empt all situations. Aim for success and plan for failure.

*'Nothing impresses like competence. It is best defence in a world in indifference and mediocrity.'*

Most importantly, delivering great customer service is a positive satisfier for the staff and people working in sales, service and support roles. Job satisfaction, getting through tough days and staying positive are easier when you know you are doing a great job and customers are generally pleased and delighted with the service received. So, a high customer service experience is a win-win outcome.

# Making every customer feel 'special' ...is the seven secrets!

*“Remember, the key to brilliant customer service is not to just solve the ‘problem’, it is to make the customer feel special as well.”*

## **Fix the person, not just the problem**

Solving customers' questions, queries or problems is not the only thing that matters. Most customers have two needs when they contact you: the first is a logical need, a fix to their problem, provide information, answer a question, etc. The second is a psychological need.

Every customer has the emotional or psychological need of feeling valued and important. In one word, SPECIAL.

The fact is that your technical knowledge is the starting point. It is what you add or wrap-around your technical ability or competence that often matters most to your customer. Many people have favourite suppliers and businesses, whether this is an accountant or a hairdresser. The 'problem' could be anything from a forgotten password, if you work on a help-desk, to making an expensive purchase.

## How to make every customer feel SPECIAL

At each and every point of contact, there are just two things every customer (internal or external) wants. They are:

1. **A solution to a problem**, answer to a question, get a quotation or buy something.
2. **To be made to feel special**, important and valued: treated as an individual.

*“It’s not what you do, it’s the way that you do it...  
and it only counts when you EXCEED the customer’s expectations.”*

## The SPECIAL model – at a glance

1. **S**peed and time measures
2. **P**ersonal and personalise
3. **E**xpectations: manage and exceed
4. **C**ompetence and courtesy
5. **I**nformation and keep people informed
6. **A**ttitude / can do
7. **L**ong-term relationship / follow-up

## It’s all about experience, not service!

*“Customer Service is everything and anything that touches a customer – directly or indirectly. Customer service means servicing customers and it’s so much more than just solving problems or addressing complaints. Customer service is part of a holistic customer experience that is capable of providing a critical competitive advantage in today’s increasingly cluttered and commoditized marketplace.”*

## **A few customer experience truisms...**

- Little things matter most
- Problems really are opportunities
- Attitude is everything
- Customers measure everything
- First reactions count
- Perception is vital
- Customer service is everybody's responsibility

# One - Speed and Convenience

*“Convenience: The state of being able to proceed with something without difficulty.”*

## **Whatever you do, do it fast without rushing**

In a world where everything is fast, and everything is time based, speed will give you the competitive advantage. Time is perhaps the scarcest commodity in the world, second only to common sense! So, when dealing with your customers deliver fast service which adds value, it shows you care, and secures trust. People will choose you and pay more if you can provide a quicker and easier service. It is proven that customers pay premium price for fast service or delivery.

*"FAST: Fast Action Secures Trust!"*

## **Whatever you do, make it easy for the customer**

It might be difficult to overestimate how ‘lazy’ we can all be. In fact, you could say we are programmed to be lazy. Seeking out the quick and easy over the long and difficult. One click, not three; delivered not collected; automated not manual. If you make yourself as someone who is easy to do business with, work with, get along with and have in a team, you will find customers and colleagues wanting to do business and work with you,

1. Take the complex and make it simple
2. Whatever the question, try and make the answer yes, without over promising
3. One way of being easy to work with is to anticipate need so the customer does not even need to think, ask or act...you are there!

*“If you see someone walking towards a door, move quickly to open it for them. It is a metaphor for everything we do and stand for.”*

## **Fast first reaction**

Your goal should always be to minimise the waiting time for all customer contact. Nobody likes to be kept waiting, held in a queue or delayed in discussing their problems with someone who can help. The level of frustration and annoyance will amplify any existing dissatisfaction, making it very difficult to recover customer goodwill and confidence.

Organise yourself and your time to respond quickly; for example, answering all inbound telephone calls within 3-5 rings, acknowledging emails within 30-60 minutes, and making eye contact within eight seconds of someone walking towards you or approaching you if you are in a face-to-face situation. Here are some examples from a variety of situations:

- Being acknowledged within a few seconds with a nod, eye-contact or a friendly greeting immediately on entering a premises, approaching a staff member, till or service point.
- Make sure you have everything you need to start serving a customer.
- Seating restaurant guests quickly, with menus and drinks while they decide their food choices
- Answering the phone within 3-5 rings
- Acknowledging emails within 30-60 minutes
- Getting to the point in a meeting, conversation, report or email
- Confirming and responding to website orders, support tickets and actions within a few minutes
- Fast loading pages and videos on a website, particularly first pages
- Fast checkout facilities on a website ordering page, enhanced by having a simple, logical and easy to use design
- Putting the main message at the start of your sentence, conversation or email
- Saying something in 10 words not 100 or 1000.

## **Speak slower and get to the point quickly**

A very common characteristic amongst customer service staff, technical people and those that repeat the same words is sometimes talking too quickly. This can then become a habit. It is also a trait of people with fast-thinking minds.

However, customers are not always able to listen or comprehend as quickly or clearly as you can talk. In fact, they cannot listen as fast as you can talk. Keep thinking quickly, but make sure you talk slowly. This will shorten the call as you will not need to repeat things or talk as much. How do you talk slowly without sounding patronising?

- Your initial greeting on the phone or face to face should be clear, slower than normal speech with a pause after each statement.
- Also, speak in 'chunks' of 7-10 words sentence fragments
- Pausing frequently for customers to absorb information and ask for clarification.

## **Shorten calls, emails and service interactions**

Give information in the same way an article is written in a newspaper, magazine or blog. Get to the point or state the most important things quickly and early. This saves time. Most customers do not want long explanations or an endless 'perhaps', until after the problem has been resolved.

## **Ten tips for shortening customer support calls**

1. Reduce chasing or repeat calls by making all information available to customers
2. Put a sense of seriousness, commitment and urgency in your voice
3. Work from a set list of questions to get the key points quickly and early
4. Ask closed-end qualification questions early in the call
5. Two-stage the call: Get information in call one, resolve after the call has ended, phone back with the answer
6. Use prepared concise answers to FAQ's, keep people on a need to know basis
7. Speak in sentence fragments of 7-10 words. Practice changing your voice tone - slower, louder and emphasising key words.

8. Use a supported and empathised redirecting statement to turn can't do into can do's:  
e.g. "I am sorry I cannot put you straight through, that is another department, let me give you the number now...do you have a pen?"
9. Interrupt nicely - use their name, apologise, give a reason, ask a question to redirect
10. Try to call them back, it is easier to control and end the call when you have made it

## Manage head clocks

Every single one of us has a mini-stopwatch in our heads. Every time we press a button, click on a link, are asked to wait or something begins, we press a start button. However, every time someone 'updates' us on progress or distracts us, we simply reset the stopwatch back to zero, making the whole 'wait' seem only as long as the last interval. It's strange, but true.

Here are some examples of how time expectations and perceptions are managed.

- Progress bars...whether waiting for a lift, a web page or application to load
- Menu options at the beginning of a call (so long as it is not too long)
- Going back to callers who are on hold
- Updating people and going back to people who are waiting at a counter, in a queue, to be served in a shop, showroom or restaurant either by making eye contact or a reassuring phrase
- Engaging people in conversation or interesting small talk whilst waiting or completing other tasks can make time seem to go quicker
- Positive distractions to help shorten the perception of time passing whilst waiting. For example, a television or video to watch on a coach or plane, service reception. Magazines and newspapers in a reception or waiting room.

## The KISS principle

Keep It Short and Simple: Taking complex issues, instructions or ideas and making them easily understandable is a real skill: make sure you develop it. Remember – whilst the details might be fascinating to some, the majority of customers do not care or do not need to know.

Key points to remember:

- Keep customers or users on a need-to-know basis, revealing more detailed information only if prompted
- Explain the problem or solution in a sentence; around 15-20 words
- No jargon, or even anything that remotely smells of jargon. If you have to use jargon, explain it clearly

## **Speed and convenience quick summary**

- Doing things quickly adds value, offer faster options if you can.
- Fast first reaction, but do not rush.
- Taking more time with customers adds value too!

Examples:

- Answering the phone within 3-5 rings
- Getting back to people promptly, within the hour, close-off queries the same day
- Immediate attention - eye contact, quick acknowledgment receipt of emails, etc.

## **Speed and time – follow-up questions and action points**

1. Identify ways that you or others can improve the time aspects of your service delivery – speeding up or slowing down as appropriate.
2. Anticipation of need - list some ways you or others can identify and anticipate customer needs before they happen.
3. What takes too long or is duplicated effort?
4. What processes, procedures or communication takes too long and can be simplified?

# Two – Personalisation and rapport

*“We see our customers as invited guests to a party, and we are the hosts. It’s our job every day to make every important aspect of the customer experience a little bit better.” – Jeff Bezos, founder of Amazon*

## Get rapport first, second and third

Rapport forms the basis of meaningful, close and harmonious relationships between people. It's the sense of connection that you get when you meet someone you like and trust, and whose point of view you understand. It's the bond that forms when you discover that you share one another's values and priorities in life.

According to researchers you have a rapport with someone, you share:

1. Mutual attentiveness: you're both focused on, and interested in, what the other person is saying or doing.
2. Positivity: you're both friendly and happy, and you show care and concern for one another.
3. Coordination: you feel "in sync" with one another, so that you share a common understanding. Your energy levels, tone and body language are also similar.

This connection can appear instantly – when you "click" with someone – or develop slowly, over time. It can grow naturally, without intent, or you can deliberately set out to build it.

Rapport isn't just a tool for building customer relationships, though; it's often the foundation of success. When you have a rapport with someone, you're better placed to influence, learn and teach, particularly as the trust that you've built up means other people are more likely to accept your ideas, to share information, and to create opportunities together.

## **Treat all customers the same**

It is important that you treat all customers the same, i.e., that you personalise each call, email or contact within the framework of best practice. Whilst you might hear the same problems and questions over and over again, no two customers are ever identical. Here are some examples of things to vary in order to personalise each call, email or contact:

- Reflect or summarise back the issue, using customer language
- Use names as appropriate
- Make small talk or not as your instinct tells you is the customer's preference
- Adapt your explanations to their level of knowledge
- Turn the empathy up or down to match the customer's need for it

## Four 'types' of customer by personality profile

Drivers "Just do it"	Expressive Do it with zing"	Thinkers "Do it right"	Relaters "Make it personal"
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<p><b>Drivers' behaviour is about getting things done.</b></p> <p>A person with this preferred style of behaviour focuses on: -</p> <ul style="list-style-type: none"> <li>● Taking action and being in control</li> <li>● Being assertive and forthright</li> <li>● Keeping communication short and brief</li> <li>● Strongly influencing decisions</li> <li>● The 'bigger picture'</li> <li>● Achieving goals</li> </ul>	<p><b>Expressives' behaviour is about feeling appreciated.</b></p> <p>A person with this preferred style of behaviour focuses on: -</p> <ul style="list-style-type: none"> <li>● Getting attention from others</li> <li>● Enjoying the service process</li> <li>● Being relaxed and sociable</li> <li>● Getting others to listen to their ideas</li> <li>● Persuading others to see their point of view</li> <li>● Self-expression and being listened to.</li> </ul>
<p><b>Thinkers' behaviour is about getting things right.</b></p> <p>A person with this preferred style of behaviour focuses on: -</p> <ul style="list-style-type: none"> <li>● Detail and accuracy</li> <li>● Analysing information</li> <li>● Time to make decisions</li> <li>● The task rather than personal communication</li> <li>● Efficiency and productivity</li> <li>● Meeting targets and deadlines</li> </ul>	<p><b>Relaters' behaviour is about getting on with others.</b></p> <p>A person with this preferred style of behaviour focuses on: -</p> <ul style="list-style-type: none"> <li>● Approval and trusting relationships</li> <li>● An atmosphere that is friendly and warm</li> <li>● Seeing another person's point of view</li> <li>● Discussing issues fully</li> <li>● Listening and being attentive</li> <li>● Being supportive and sensitive</li> </ul>

## Be friendly and familiar

Whether it is a call or face-to-face contact, use a voice tone similar to the one used with someone you know but are not overly friendly with. A 'familiar' voice tone will give the customer the experience of 'we know each other' and put them at ease. Avoid: Being overly friendly or pretending you know them. Here are some practical examples:

- On the phone, talk as you would to someone you know, without being over familiar.
- Always ask for the customer's name first, ahead of any other information such as account number
- When the customer says their name, repeat it back to them clearly and write it down if on the phone.
- Use a name salutation or greeting on every email, including standard templates.
- Segment databases and automated contacts to personalise online and email contact and experiences.

## Mirror behaviours, views and values

When two people are said to have rapport, that is, they get on well, they often adopt or share 'mirrored' values, views and behaviours. 'Mirrored' in this example might mean 'copied' or 'similar'.

A mismatch of these elements can be the quickest way to NOT get on with someone. We mirror subconsciously and it is completely natural for nearly all of us to do it when on a call, email or talking face-to-face. It is also very difficult to detect consciously. There are many different aspects to match or mismatch. Here are a few that work well in the context of a customer service call:

- Rate of speech
- Voice volume
- Vowel sounds, accents and pronunciation
- Posture and body language
- Mood; being careful to cross-match negative emotions with more positive ones, so frustration becomes urgency

- Opinions that the customer might be sure to agree with, eg, 'I do not want to keep you waiting any longer than I have to'
- Value statements that you sense the customer will agree with, eg, 'It is important that...'

## **Use common-sense flexibility and bend the rules**

Rules, policies and procedures are important to know and keep to in the majority of cases. However, there are always valid and common-sense exceptions that, as the saying goes, prove the rule. Discuss situations with your manager or colleagues, where some flexibility and common-sense might serve customer satisfaction rather than simply applying the rule. Here are some examples:

- Where a product is faulty and only a few days out of warranty
- Customer would be better to phone back than be put on hold
- Customer requests a direct dial number for an engineer when this is not normal policy
- A customer requests a timed visit when 'AM or PM' is the norm
- A small charge or condition is seen as a major source of annoyance to a customer

Remember – it can take many months or years to build and create customer goodwill or loyalty, only seconds to lose it.

## **Remember customer details and use them**

Imagine on each call, email or contact that the customer has a sticky-note on their forehead that says 'Make me feel important'. One of the easiest and most profound ways is to remember people. Even if it is only your computer system that is doing the remembering, while you are simply reading notes typed in by a colleague, this has the effect of impressing the customer and creating a perception of confidence.

- Always update any systems you have with contact notes
- Imagine this person will be dealing with you or your colleagues again
- Learn to recognise voice tones and faces; remember names
- Use what you know; refer back to previous contacts and issues
- Ask questions based on what you know about your customer
- Remember individual preferences – little things that make a big difference

## Communicate empathy first and always

*‘Studies show that as much as 38% of the opinions people form about us, when speaking to us are based on the tone of our voice. Only 7% are based on the actual words we use – 55% body language.’*

Whilst empathy might not be something that ticks your box in terms of a positive service experience, it is very important to the majority of your customers. The fact is, a customer does not care what you know, they want to know how much you care. Here are a few things to do in each call, email or contact:

- Use an appropriate empathy statement – ‘I am sorry to hear that...’
- Use an empathic tone of voice, without overdoing it!
- Empathise with any emotions – “These kind of problems can be very annoying”
- Always use empathy at the beginning of any problem-solving call, email or contact and maybe again at the end.

## Personal personalise quick summary

- Ask the customer’s name first before you do anything else
- Use your name, use the customer’s name
- Personalise your service promise and be friendly.
- Customers really value when you are easy to work with, so do it!

Examples:

- Names are important, being friendly but not over familiar.
- Using plenty of eye contact and the correct tone of voice.
- Do something extra for each customer - be flexible and make exceptions
- Remember your customer.

## Personal – follow-up questions

1. How can you and your colleagues increase the level of personalisation?
2. How can customer relationships can be improved or furthered?
3. Does your business remember it’s customer and easy to return and repeat visits?

4. How can you build in more flexibility and individual personalisation to address different customers or customer groups or types?

## Communication Skills Model for Increased Personalisation

### Vocal impression

Friendly, helpful and cheerful
Knowledgeable and confident
In control and professional

### Connecting

1. Being Ready
Anticipating the needs of customers: having the information I need or knowing where to get it, having all the equipment I need, use of technology.
2. Welcoming
Greeting customers and conveying an attitude that shows them I am interested and willing to help through tone of voice, verbal language and body language.
3. Making the Call Count
Taking control of the call, capturing customer information; qualifying the call

### Consulting

4. Listening
Hearing and remembering the feelings and facts and the significant concerns that my customers express.
5. Asking
Creating effective questions to understand my customer's situation and what they really need: to keep the customer participating: to control the call.
6. Restating
Letting my customers know I understand what we said-both their feelings and facts of the situation; being sure that we agree on what they are asking for.

## Convincing

7. Offering information and options
Giving my customers useful information; providing them with choices. Using clear explanations and statements: “packaging” information and options.
8. Setting expectation and getting agreement
Letting customers know what I can and cannot do; being clear; giving details.
9. Exploring further needs and getting agreement
Asking good questions; discussing features and benefits to help the customer visualise the usefulness of the service; assessing the agreement level.

## Confirming

10. Asking for a decision and agreement
Being direct, concise and confident in asking for commitment.
11. Summarising and checking
Summarising key points and checking for satisfaction.
12. Thanking
Expressing appreciation to customers; making customers feel important.
13. Following up
Ensuring that what was promised to my customer is what they received; making sure the transaction is handled smoothly.

## Difficult customer service skills

14. Handling objections and questions
Responding to objections stated by my customers; changing an objection into an opportunity.
15. Handling challenging situations
Doing my best to understand and help customers who may be angry or upset; recovering from mistakes made by myself or by my organisation; giving bad news.

# Three - Expectation Management

*“Setting customer expectations at a level that is aligned with consistently deliverable levels of customer service requires that your whole staff, from product development to marketing, works in harmony with your brand image.” – Richard Branson, founder of The Virgin Group*

## **The elephant in the room**

*“Meeting expectations is good, exceeding them is better. That means managing expectations first.”*

There are many assumptions, often unspoken, that you cannot say “No” to a customer.

People often assume a customer knows what they expect or even what they're talking about. You also assume that unless you say “yes” then customer will not be satisfied with your service. You can avoid this pitfall by having a conversation in which you openly discuss what's expected, how it might be accomplished, and how success will be measured. Remember to leave plenty of opportunities for questions.

One of the best ways to manage expectations is to make sure you communicate with everyone positively, pro-actively and on a timely basis. In the early stages of an enquiry or as a key milestone or deadline approaches, you may want to even over-communicate.

## **Just say no, but nicely!**

You have to be comfortable that the expectations are honest, realistic and achievable. If they're not, you can--and should--push back. This is best done earlier rather than later.

The key here is saying 'no', 'not now' and 'maybe' in a way that also leaves room for good news later - a safety buffer if you like. . If you can master the fine art of 'saying no, nicely' you have won half the battle of managing expectations successfully.

## **The experience and expectation balance**

Delight = EXPERIENCE EXCEEDING EXPECTATION

Satisfaction = EXPERIENCE EQUALS EXPECTATION

Dissatisfaction = EXPECTATION EXCEEDING EXPERIENCE

## **Under-promise, over-deliver**

Customer satisfaction is not based on your ability to deliver to your stated promises or customer's expectations. It is based on your ability to exceed them.

The customer will have an expectation for all aspects of their service experience, from the final outcome to the process involved in getting it.

The most important technique is that, in every call, email or contact, when you make a promise, make sure it conforms to these three rules:

Have a built-in safety-buffer that you know can be exceeded or met

Your promise must have specific dates, times, amounts and measures – avoid meaningless phrases such as 'as soon as possible' or 'later on'

Have a range of outcomes or different options and alternatives, best case and worst-case scenarios

## **Say 'no' nicely and positively to unrealistic timescales**

Sometimes, what the customer wants, would like, demands or expects is physically impossible or very difficult to agree to. However, saying 'no, I can't do that' does not solve the problem and only serves to further annoy or frustrate the customer. Here are three ways to say 'no' nicely:

- Say 'not now' and give or negotiate a more realistic timescale

- State the reason, eg, 'I cannot do that because...'
- Offer an alternative option, eg, 'I cannot do that, but I might be able to...'

## Urgent is the not the same as important

All customers are important. And some are more important than others. But 'urgency' is often negotiable and usually very subjective. It is common to confuse urgency with important. Just because something is urgent, it does not make automatically important. You can actually improve the customer's experience and satisfaction by learning how to 'negotiate' urgency and timescales.

<b>Urgent Important</b>  1	<b>Urgent Not Important</b>  3
<b>Not Urgent Important</b>  2	<b>Not Urgent Not Important</b>  4

## The Difference Between Urgent and Important

**Urgent** means that a task requires immediate attention.

These are the to-do's that shout "Now!" Urgent tasks put us in a *reactive* mode, one marked by a defensive, negative, hurried, and narrowly-focused mindset.

**Important** tasks are things that contribute to our long-term mission, values, and goals. Sometimes important tasks are also urgent, but typically they're not. When we focus on important activities we operate in a *responsive* mode, which helps us remain calm, rational, and open to new opportunities.

## Questions to ask customers or colleagues

When faced with an impossibly urgent request, follow these steps

1. First, be positive: “Yes, I would like to help?” “Tell what you are looking for or need?”
2. Ask what they need it for.
3. If you ask “when they would ‘like’ it by”, also ask the “...latest they need it” as well.
4. Use the ‘cannot do, but what I can do or suggest is’ technique
5. Use the ‘broken record’ technique to repeat your suggested timeline or solution
6. Give a reason why can do it straight away or now.
7. Avoid value promises such as “as soon as possible” or “later on today”
8. Summarise at the end.

## Micro-manage the details: Applying the five S’s for improved customer experience

1. Sort
2. Set in order
3. Shine
4. Standardise
5. Sustain

This means being careful to look after the details of customer service experience, the small things that make a difference and are expected by customers. Nowhere is this more apparent in the Japanese approach to customer service, quality and process management. In the Japanese world there is a model known as the five ‘S’s’. Here is a brief summary of the five 5S phases, developed by the Japanese in seeking excellence and quality. They can be translated as "sort", "set in order", "shine", "standardise", and "sustain".

### Sort (Seiri)

Seiri is sorting through all items in a location and removing all unnecessary items from the location. This can make finding things quicker and easier. The goals and benefits of ‘Sort’ include

- Reduce time loss looking for an item, name or reference by reducing the number of items, options or possible locations

- Reduce the chance of distraction by unnecessary items.
- Simplify inspection, checking and review
- Increase the amount of available, useful space.
- Increase safety by eliminating obstacles.

### **Implementation:**

- Check all items in a location (whether physical space or computer based) and evaluate whether or not their presence at the location is useful or necessary.
- Remove unnecessary items as soon as possible. Place those that cannot be removed immediately in a 'red tag area' so that they are easy to remove later on.
- Keep the working areas clear of materials, files and stuff except for those that are in use to serve customers.

### **Set in order (Seiton)**

Seiton is putting all necessary items in the optimal place for fulfilling their function in the workplace. The objectives here are:

- Make the workflow for serving customers smooth and easy.

### **Implementation:**

- Arrange your space and work stations in such a way that all equipment is in close proximity, in an easy to reach spot and in a logical order adapted to the work performed. Place components according to their uses, with the frequently used components being nearest to the workplace.
- Arrange all necessary items so that they can be easily selected for use. Make it easy to find and pick up necessary items for serving customers.
- Assign fixed locations for items. Use clear labels, marks or hints so that items are easy to return to the correct location and so that it is easy to spot missing items.

### **Shine/Sweep (Seiso)**

Seiso is sweeping or cleaning and inspecting the workplace, tools and machinery on a regular basis, very frequently or constantly for customer areas. Goals here to are:

- Keep the customer space and work areas safe and easy to work in.
- Keep the customer space and work areas clean and pleasing to work in.

- When in place, anyone not familiar to the environment must be able to detect any problems within 50 feet in 5 sec.

### **Implementation:**

- Clean the and equipment on a daily basis, or at another appropriate (high frequency) cleaning interval.
- Inspect the workplace and equipment while cleaning.

### **Standardize (Seiketsu)**

Seiketsu is to standardize the processes used to sort, order and clean the workplace.

- Establish procedures and schedules to ensure the repetition of the first three 'S' practices.

### **Implementation:**

1. Develop a work structure that will support the new practices and make it part of the daily routine.
2. Ensure everyone knows their responsibilities of performing the sorting, organizing and cleaning.
3. Use photos and visual controls to help keep everything as it should be.
4. Review the status of 5S implementation regularly using audit checklists.

### **Sustain/Self-discipline (Shitsuke)**

Shitsuke or sustain the developed processes by self-discipline of the workers. Also translates as "do without being told". The goal here is to ensure that the 5S approach is followed.

### **Implementation:**

1. Organize training sessions.
2. Perform regular audits to ensure that all defined standards are being implemented and followed.
3. Implement improvements whenever possible. Worker inputs can be very valuable for identifying improvements.
4. When issues arise, identify their cause and implement the changes necessary to avoid their recurrence.

Learn and apply these principles, both as an individual and a business, and your service level will quickly become even more outstanding.

## Use two-stage response

During busy times or for more complex calls (or challenging customers) use the two-stage call technique. The first call should diagnose and explore the problem with asking questions. The second call, at a later time or date, is when you call back to discuss or explain a solution.

Within the first part of any call, email or contact use a phrase like this to achieve this: 'From what you have told me so far, I think the **best thing** is to **leave it with me** and I **will** call you back before 5pm.' The words in bold are the ones to mark out with your voice tone in order to sound convincing.

## Apply the alternative choice technique

*'Under promise and over deliver'*

Give people one option and they feel forced into accepting something. Give them too many options and they are confused. State two or three clear options, choices or alternatives and they are more likely to choose one and be happier with it.

If you ask someone if they prefer A or B they are more likely to choose A or B rather than suggest an alternative or say neither.

## Expectations / manage or exceed quick summary

- It only counts when you exceed the customer's expectation.
- In the absence of a clear expectation – the customer creates one.
- Create specific promises, then beat them and build in a 'safety buffer'
- All expectations should be specific, clear and have a safety buffer.
- Anticipate needs and doing things or communicating without being asked.

## **Expectations – follow-up**

1. List three expectations can be better managed and delivery exceeded
2. Identify examples of things that some customers might like, want or expect and sometimes are not achieved or matched

# Four - Competence and Courtesy

*“The sole reason we are in business is to make life less difficult for our clients”*

## **Exaggerate your manners**

In most workplaces and business, we adopt what might be referred to as ‘exaggerated manners’. This means slightly more deliberate use of politeness, courtesy and general good manners.

Many people will also unconsciously ‘mirror’ back the courtesy, respect and manners that is used on them.

## **Develop the pilot’s voice**

On almost every airline, in every country, the pilots seem to speak with the same voice tone. This is an important part of their training. What they say may vary, but the calm, confident and reassuring way they say it does not. You cannot go too far wrong if you develop your own ‘pilot’s voice’ with your customers.

## **Use competence and solution vocabulary**

Make sure that when describing solutions or situations you use a positive vocabulary. Do not say or do anything that might imply a criticism or fault of your colleagues or other parts of your organisation. No blaming, no complaining. And make sure you do not blame the customer either, even if it might be their fault.

## **Create prompt sheets and FAQs**

Being consistently good is important. Transferring best practice to all team members and situations is vital. Creating prompt sheets around common questions or problems can be very useful. The prompt sheet should include standard questions, explanations and solutions. It is similar to FAQs in a manual or website. However, it must not be used or treated as script.

## **Competence / courtesy – quick summary**

- Know your CORE skills and aim to be an expert at your job.
- People like to work and speak with people that inspire confidence.
- Be the best at what you do..... and show respect to the customer.
- First impressions matter - and last impressions are lasting, really concentrate on doing both of these well.

Examples:

- Be an enthusiast about what you do and how to add value
- Make sure all your communications - in person, on the telephone and in writing project politeness and professionalism
- Be an expert on all your systems, procedures, people, pricing and products.

## **Competence and courtesy – follow-up**

1. How can you improve the customer's impression of competence?
2. Three of the most important examples of courtesy that your customers expect
3. What are the most common grumbles, complaints or dislikes customers have?

## **Ten top tips for the better communications**

1. Make a great first impression and a really positive vocal image and get the person's name and details FIRST- ALWAYS!
2. Echoing – repeat and prompt for more information when the customer states their reason for contact you
3. QQQ – quick qualification questions before you start solving a problem or getting more information.
4. Reassure and use empathy and manage expectations BEFORE starting the problem-solving process.
5. Ask questions to demonstrate competence, empathy and understanding.
6. Match mood and emotion of caller – be sensitive to their situation and always demonstrate courtesy and politeness.
7. Link asking questions or action to caller or user solution.
8. Decide if one-stop or two-stage call at the beginning if you can.
9. Offer a choice of options when appropriate to speed up choices and call handling.
10. Summarise clearly at end of call, giving your name, thank them for their time, inquiry or understanding.

# Five - Information and Informed

*“The key is when a customer walks away, thinking ‘Wow, I love doing business with them, and I want to tell others about the experience.’*

## Keep the customer informed

To a customer, no news is **bad** news. Keep them informed and updated regularly, even if there is no news. Telephone is always more personal than email and often quicker. Text or email is a preference for many customers is very efficient. Particularly short, quick and appropriate communication around deliveries, updates and process information.

## Care for structure and substance

- It is not just about what you say, but how you say it.
- It is not just about what information is on a website, it is about how quick and easy it is to find.
- It is not about what information is in an email, it is about how easy and quick it is to read and understand.
- It is not just the fact that you have informational signs and notices – are they clear, read and understood?
- Any communication you have with a customer has to be clear, concise and customer-friendly.

## Be clear and concise

*'It takes slightly longer to write a short document than a longer one.'*

It takes longer again to write one that is understood the first time the customer reads it and which is completely free of errors. However, it is vital to take the time to do this. Clarity and conciseness save you and your customer time in both the short and the long term. It also minimises the opportunity for further misunderstandings and the need for further contact.

Keep these points in mind, in all your communications – telephone, face-to-face and emails and written communications:

- If you are asked a closed question (starting with a verb), answer it with a direct 'yes' or 'no' before explaining any other possibilities.
- Get straight to the point, putting the most important information at the beginning. Imagine you are writing a newspaper article, not a crime thriller.
- Keep all sentences, written or spoken, to around 14 words, no more than 20.
- Use shorter words whenever you can. Replace any conjunctions or commas with full-stops when you can.
- Offer no more than three main options. Two is optimal.
- Keep the customer on a 'need-to-know-basis'; avoid over-communicating. If the customer needs more information, let them ask.

## Use the TED questioning approach

Traditional questioning techniques focus on asking a combination or variation of open and closed questions. The TED approach is slightly quicker, more accurate, gets more relevant information to the surface and avoids the 'too many questions' experience for the customer. Maybe get agreement before using it for even better results, eg, 'In order to solve your problem I need to ask you some more detailed questions – will that be okay?'

Then, use TED, varying it according to your style and situation.

- Tell me more about
- Explain what happened exactly
- Describe it in more detail

## Types of question and listening

### *Questioning skills*

- Close-ended questioning
- Open-ended questioning
- High-impact questioning
- Probing questions - TED: Tell me more, Explain, example. Describe, more detail

### *Active listening*

- Make eye contact and maintain if F2F
- Ask appropriate follow-on and probing questions
- Make physical and verbal nods
- Use their words to summarise and question more
- Wait for the right moment to interject
- Verbal acknowledgments and repeating key phrases
- Summarising and restating - take notes to give customers confidence

### *Advanced tips*

- Get customer name and details FIRST- ALWAYS!
- Echoing – repeat and prompt for more information
- QQQ – quick qualification questions – “order or just looking for a price?”
- Reassure and use empathy and manage expectations BEFORE starting problem solve
- Decide if a one-stop or two-stage conversation at the beginning of a call if you can.

## **Information / informed quick summary**

- Share knowledge – people love to learn new things - but keep it simple
- Keep customers informed of progress - regular updates by phone or email
- Summarise and check for understanding at the end of every meeting or call

### **Examples:**

- Help customers get the best from you - explain “next time....”
- Talk them through what you have done for them

## **Information – follow-up questions**

1. What are some common misunderstandings and miscommunications that exist in the customer process?
2. How can customer information and communication be improved?

# Six - Attitude

*“Treat the customer better than you would want to be treated.”*

## **Turn can't dos into can dos**

Of course, saying an outright 'NO!' to a customer is not desirable. Even if it is true, it is unlikely to go down well in the short or long term. The fact is that, even if they hear or read a 'no', they might well try to escalate the problem to someone who can, will or is able to say 'yes'.

So, this technique is very useful. Whenever you have to say 'no', 'not now', 'not possible' or something similar, end the sentence with a suggested alternative or two, e.g., 'I am sorry I cannot give you a full refund but I can issue you a credit note or change your item for a different size'.

Customers will categorise people subconsciously into 'part of the problem' or 'part of the solution'; this technique will make you look and feel like part of the solution.

## **Don't take anything personally**

Never, ever, take anything said to you on the phone or in an email personally. People say things without thinking, forgot you are human or simply blurt out an email that is too heavily fuelled by the emotion of that moment.

## **See the glass half full, not half empty**

Always assume that there might be a solution; keep a generally positive view and it may well become a self-fulfilling prophecy.

## Eat the ugly frog

*If you have to eat a meal with a frog in it... eat the frog first.*

*If you have to eat a meal with two frogs, eat the ugly one first.*

If you have bad news to give a customer or a difficult customer and you need to manage an expectation – do it fast, first and without delay, e.g.:

- 'I have spoken to our ordering team and your item will be another 14 days.'
- 'We have tried everything, but cannot arrange delivery before Friday.'

Customers do not care how much you know, until they know how much you care. That is a fact. Around 20-30% of people are more concerned with technical aspects than with emotions – maybe you are one of them. For the rest, a simple empathy statement will oil the wheels and make everything work more smoothly.

- 'This sort of thing can be very frustrating.'
- 'We need to reset passwords regularly to protect you, and we are sorry for the inconvenience.'
- 'Sorry I did not get back to you before now.'
- 'I am very sorry that you did not get an answer until now.'

## **Problems into opportunities - making it GREAT FUN**

1. Get it (the emotion) off their chest
2. Get the facts using clear, short questions
3. Take Responsibility and apologise
4. Empathise sincerely – feelings and facts
5. Agree a solution, next step or give a credible answer
6. Test understanding, review and thank
7. Follow Up Now!

### **Handling difficult situations:**

- Give the customer your immediate attention
- Be neutral, not defensive: listen first, talk later
- Remain professional and calm
- Focus on the customer, then the problem
- Empathise – facts and feelings

### **Staying calm**

- Control posture – stand up
- Breathe deeply
- Moderate voice tone
- Take a break before the next call
- Don't take it personally – it isn't!

## **Attitude / can do quick summary**

- Always say what you can do, or will do – not what you can't do, or won't do
- When the customer seems frustrated, wronged or annoyed always start with empathy and reassurance. Fix the customer first and solve the problem second.
- There is always a solution - this is the starting point to solving any and all problems

### **Examples:**

- Make their day! - If the customer hasn't got a smile... give them one of yours!
- Manage your attitude and emotions, stay focused on creating a positive customer experience.
- Do not ever be negative about your company, other customers or your colleagues. It makes you look less, not them.

## **Attitude – follow-up**

1. Three examples or ways you can personally add value and go above and beyond to delight and exceed customer's expectations.
2. Define attitude in terms of customer experience and the impact of your job satisfaction.

# Seven - Long Term Follow Up

*“Just having satisfied customers isn’t good enough anymore. If you really want a booming business, you have to create raving fans.” - Ken Blanchard*

## How to end every call

Just before you thank the customer for their call, ask:

*‘Is there anything else I can help you with?’*

There is nothing better. It indicates that you are not trying to rush the customer off the phone and it signals that you are looking beyond the current situation today.

Use it. It works.

## Use random follow-up

*"Customer satisfaction is worthless. Customer loyalty and goodwill is priceless."*

Every day, phone (not email) around 3-5 customers with whom you raised and closed tickets or problems in the last three or four days.

Check for satisfaction and ask if you can help with anything.

If they make positive comments, thank them. If they make negative comments, thank them and apologise.

In both cases, good and bad, ask them to send you a short email with their comments. Feed these emails back to your team or manager on a weekly basis.

Any negatives will be more than drowned out by the positives; you will gain much deserved praise and the customer will feel valued and important since you have asked for their opinion and took the time to check.

The fact is, most customers are delighted but do not have the time or inclination to say so.

## **Visualise a ten-year customer**

Did you know that the average UK household will spend over £50,000 in supermarkets in a ten-year period? This realisation is one of the reasons these organisations now offer much better customer service.

Treat every one of your customers with a view to keeping them as a ten-year customer. And, better still, as a customer that refers you to others and keeps coming back for more services.

## **Ask for feedback**

You cannot know how you are doing unless you ask. Yes, **ask**, not by sending long and complex surveys. Always encourage feedback from customers - open and closed loops as appropriate.

Using different kinds of benchmarking and metrics (competitive, non-competing, and existing versus future ideal)

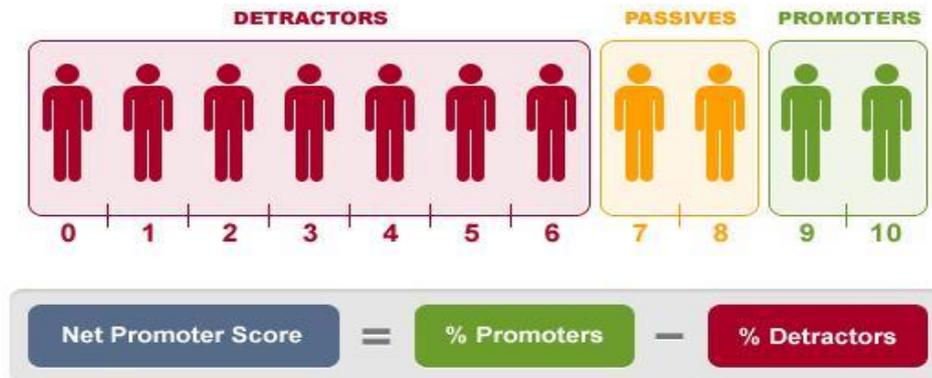
Customer service key performance indicators with worked examples.

Defining your added value through service brilliance and the 'ultimate question' – "Would you use us again and regard to others?"

## Defining your added value and the ‘ultimate question’

Considering your overall experience with us, how likely are you to recommend or speak positively about our product or service to others?

...and what would you say?



Net Promoter or Net Promoter Score (NPS) is a tool that can be used to gauge the loyalty of customer relationships. It can also be varied to apply to internal customer service and employee satisfaction.

It is calculated based on responses to a single question: **How likely is it that you would recommend our company/product/service to a friend or colleague?** The scoring for this answer is most often based on a 0 to 10 scale.

It is often followed by the more important question: **“Why...”**

Additional questions can be included to assist with understanding the perception of various products, services, and lines of business. These additional questions help a company rate the relative importance of these other parts of the business in the overall score.

## Be proactive

It is one thing to be good at handling and managing in-bound calls. It takes customer service when you can implement an outbound calling approach.

Consider scheduling regular calls, emails or visits to customers, or a selection of them. Make sure these are not just sales calls in disguise. Of course, looking for new sales opportunities from existing and hopefully satisfied customers is a very, very smart thing to do. It is better though to concern yourself with adding value and interacting with customers, helping them to use you and your products and services better, and then making it easy for them to buy more from you.

*“Customers will forget what you said or did within a few hours,  
but will remember how you made them feel for a lifetime.”*

## Long-term relationship / follow-up quick summary

- Follow-up on promises, not just yours, but other peoples. Own the problem.
- Check for satisfaction - at the end of each call, after a problem has been solved and on a regular basis.
- Always act in the best interests of the long term customer and keeping the goodwill and cooperation of internal customers.

### Examples:

- *'Is there anything else I can help you with?'* - end each call, email and conversation with this.
- Welcome complaints! - they are the customer asking you to turn things around
- Make random follow-up calls or send follow-up emails requesting feedback
- Use regular customer surveys or feedback reviews

## Long term relationships – follow-up

1. How can you improve the quantity and quality of follow-up and follow-through? List three ways
2. Consider ways your service can be more pro-active in contacting and managing both internal and external customers.
3. What is the value of the customer over the long-term?

# And Finally ...

*“Above all, we wish to avoid having a dissatisfied customer. We consider our customers a part of our organization, and we want them to feel free to make any criticism they see fit in regard to our merchandise or service. Sell practical, tested merchandise at reasonable profit, treat your customers like human beings — and they will always come back.” – Leon Leonwood Bean, founder of L.L. Bean*

## **Aim for consistency in your service**

This is the holy grail of customer service. Every call, every support contact, every customer, every day, you have to be 100% on top of your game. Whether you take twenty customer problems a day or 200, each one has to sound like the only one that matters and has to be the same in style and substance.

like consistency; they might even prefer to deal with only the same person.

## **Aim for excellence and become the role model**

Nobody is motivated to do an average job. When you do something well or excellently you release chemicals in your brain that make you feel good and make you even more motivated to do even better. Let the other chumps be average. Decide today to be the most knowledgeable and skilful customer service person that it is possible to be – the person that your company and customers recognise as excellent at what you do.

## **Suggested actions to add value to what you do...**

1. Focus on making your customer look good to their ‘customer’. If you are not sure about this, just consider the impact of doing the opposite.
2. Follow-up requests and problems with random calls or emails to check satisfaction and get feedback, especially positive!

3. Pass customer comments to others to act on and communicate back to customer.
4. Share any and ideas that will improve service experiences with managers and colleagues.
5. Send out a mini-survey or feedback email once a week or every few weeks and review the answers.
6. See 'difficult' customers as just being different. Adjust your approach to match them.
7. Practice developing prompt sheets, standard templates and simple process check-lists and other techniques to improve your service skills and consistency.
8. Develop a 'buddy-coaching' system with a colleague to review each other's calls, visits, works and emails.
9. Decide on which two or three customer service KPI's are most relevant and review regularly.
10. Make a conscious effort to help and support your colleagues and co-workers.
11. Always take ownership and look for everyday small opportunities to add-value and go beyond the customer's expectation.
12. Learn as much about your company, products, services and customers as possible – constantly.

*“Brilliant customer service means learning to love serving customers and living and owning a standard of service above all others.”*



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