ACE IT!

Customer Service Series Publication #1:

Addressing Customer Enquiries

When fielding enquiries from past, present, or future customers or clients, every instance of outreach and interaction represents a completely fresh new opportunity to make (or break) a good impression. Best-in-practice customer service means approaching each new enquiry with the deliberate intention to hit the target, first time and every time. Follow our easy five-step approach for Addressing Customer Enquiries and ACE It! every time.

Dr. Laura Carstensen, a psychologist and longevity researcher at Stanford University, said in 2018 that the "phenomenon" of emphasizing the negative over the positive is widely believed by psychology scientists to have arisen to serve an evolutionary purpose. "It's more important for people, for survival, to notice the lion in the brush than it is to notice the beautiful flower that's growing on the other side of the way."[1]

Understanding this basic human survival tendency not only explains why your customers will place their focus on your mistakes (the "lions in the brush") during these critical interactions, but it also informs the opportunity for us to plant that new "beautiful flower" in the business relationship garden with every new enquiry event. But easier said than done, right? Where do we start, and how do we proceed to optimize our chances of success?

At Newton Enterprises, we have three decades of experience in the successful service of customers and clients. Let us explain what we've learned in that thirty years, distilling down an effective customer service enquiry response process to its five-step essence and giving you the systematic, process-centric, easy-to-apply tools necessary to captivate your clientele time after time and thereby ensure that they remain content with the garden full of positive memories that is your blossoming and ever-green professional relationship.

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Step 1: RESPOND!

There is nothing more critical to making or preserving a first impression than the very first step in your process: the **response** to the customer's enquiry.

In our experience, there is no substitute for live person-to-person communication at this moment of the initial enquiry. Tone and intent are unobstructed by vocabulary and by the veil of typically modern modes of communication such as text, chat or email. Your voice is your best tool to convey reassurance and confidence.

Electronic correspondence is nevertheless a fact of the modern business world, and in many cases it's your customer's preference. Don't buck the trend, embrace it! Follow their lead, using the mode that has been established, but shifting gears whenever necessary to ensure effectiveness.

No matter how that initial enquiry is fielded, the customer must be engaged in alignment with the timeless advice of Emily Post, which she first began to frame in 1922[2]:

- ✓ Practicing good manners (e.g., "please" and "thank you" along with all the other cultural and customary norms);
- ✓ Showing respect for the customer and the customer's need(s), such as through active listening and by the use of appropriate modes of address;
- ✓ Giving due consideration to the customer's expressed sense of urgency and other aspects of their perception that help to frame the expectations which are the purpose of the enquiry to begin with;
- ✓ Reflecting an honest understanding and an earnest promise to deliver timely and thorough resolution of the enquiry, within your capabilities.

Applying these one-hundred-year-old practices in our response must provide the answers (as fully as possible) to the classic journalist's questions: the "who? what? where? when? why? how? and how much?" details of the customer's problem as well as their ultimate expectations for a solution. Don't call it quits with the application of the Emily Post techniques until each of those journalist points has been addressed.

Your response to the customer's enquiry should be as prompt as possible. The customer's time, like yours, is precious and limited. Responding quickly enables the initiation of the ACE It! process at the earliest opportunity, minimizing the time to resolution. And a timely response is often the highest form of respect that you can pay to your customer, imparting a sense that the

urgency is shared and that the customer is not just heard but understood. Good stuff!

Step 2: RECAP!

The Ace It! process is one of communication at its core, and we all understand that the textbook definition of communication simply hasn't taken place without the sending and the receiving of the message.

Step 1 gives us our rough draft understanding of the enquiry at its core, by spending time and applying careful technique to answer the journalist's questions. Step 2 is the time to corroborate that understanding by completing a careful, comprehensive, point-by-point **recap** of the problem statement.

Restate the questions that you asked, and what you think you heard in response, detail by detail. Paraphrase to keep this recapitulation brief, but not at the expense of compromising your understanding of those precious details. Don't rephrase in the interest of time if it risks losing the understanding that cements your understanding of the problem statement.

The "when?" question is germane not just to a description of the client's need, but it is also especially important to agree on deadlines for follow-up and resolution, as appropriate. If the customer's enquiry merits the answer to one or two simple questions, no need to belabor the establishment of a deadline; but especially in the case where the problem is complex, the customer's need is urgent, and/or your own resources are limited, it becomes critical to define the date and time by which you promise to offer interim progress reports and the ultimate resolution that closes the enquiry.

The "how much?" question has bearing not just on establishing an understanding of the client's needs, but it's also relevant to compensation. In the retail sector, price is most often predefined and readily known. In B2B work, it's often necessary to negotiate a fair price for goods and services. And in consulting, passing along the rate sheet and obtaining confirmation of terms and conditions should be recapitulated before any work commences.

Step 3: RESOLVE!

In Step 3, your strengths get to take center stage, as you complete the work necessary to **resolve** the enquiry.

In our experience we've encountered many organizations that operate under the premise of "under promise, over deliver" that is generally attributed to business management author Tom Peters. But almost as quickly as he offered

up this paradigm of managing expectations in 1987, Tom followed up with the observation that organizations whose goods and services are reliable and predictable often outperform those whose offerings are different than what was promised.[3]

For our part, we endorse the "say what you mean and mean what you say" approach that is generally attributed to World War II general George S. Patton, Jr.[4] (perhaps his one and only turn of phrase that is both constructive, aligned with modern social norms, and can be quoted in polite company). In one-time, transactional situations, the customer might be pleased that an outcome exceeded expectations in a meaningful way. But what happens in the longer term? How do you explain the first time that you're only able to meet the deadline, rather than delivering early? The price discount that you just can't offer under current economic circumstances, but the client has grown accustomed to receive? We think it's better to hit your target as closely as possible each time, and to be absolutely transparent when there is a variance, for better or for worse. Tell your customers what they should expect, agree that your promised solution meets expectations, and then deliver. Say what you mean and mean what you say.

Regardless of your philosophical bent, be deliberate in setting your policy for managing customer expectations, and then revisit the performance that the policy delivers (especially in terms of customer / client feedback) at adequate intervals to facilitate continual performance improvement. Plain and simple.

No need for us to offer any advice about how to get the job done, that's your area of expertise! Just deliver goods and services that are aligned with your brand, your vision, your success goals, and the expectations of your customers. Remember at all times that your product is a direct reflection on you and your company. You'll get as much out as you put in!

Step 4: REVIEW!

If you're on track with the ACE It! process up to this point, you have received and understood your customer's need, verified that understanding via recap, and solved the problem by the delivery of goods and services that are aligned with your and your company's values.

Here at Step 4, a formal **review** of the outcome with the customer is your opportunity to validate a job well done, to highlight areas of excellence, and to solicit for constructive feedback that will drive continual improvement. You worked hard, now take the credit for it!

Document what you learn in the review, and use appropriate tools to do it. In a large organization, there may be an established Customer Relationship Management (CRM) system and accompanying standard operating procedures to define how to capture this feedback. In a retail setting, your point of sale (POS) system or app may allow for a quick review of products and services or a customer satisfaction survey on conclusion of the transaction. You get the point.

Regardless of the means by which you capture this feedback, it's potentially just as valuable to you as the other compensation you receive for the job well done. Your performance "report card" becomes the basis for raising the bar the next time, gives you the change to right any wrongs in your process, and strengthens your likelihood of future success! Make the review a systematic part of your way of working. It's worth your time.

A thoroughly documented customer satisfaction review also pays dividends in the event of a dispute, an unwelcome outcome but one that businesses may face at some point in their history. Solid performance documentation can sometimes be the sole resolution to the dispute, but it also represents a valuable component of your defense in the event that more serious intervention proves necessary, such as collections actions or litigation.

Step 5: REPEAT!

In the context of our ACE It! process, the **repeat** step has two distinct but important meanings:

- Your overarching goal is for today's customer to become tomorrow's customer as well, whether directly (via repeat business) or indirectly (by referral to a new client, based on the job well done). If you're thoroughly invested in the ACE It! process and you apply yourself to achieve high standards of customer service each and every time, you should enjoy appreciable levels of repeat business.
- You may have discovered in Step 4 that the goals established early in the enquiry have not yet been achieved, that a gap remains between expectations and outcome. Best case, this gap exists by design, with the achievement of success coming only from an iterative process that was expected to take multiple passes to get the job done; in this context, "repeat" was part of the plan all along. But it's also a legitimate possibility that the expected outcome simply was not met, whether due to some inadequacy in the process up to that point, or due to the introduction of other factors / externalities that were not anticipated but had a material

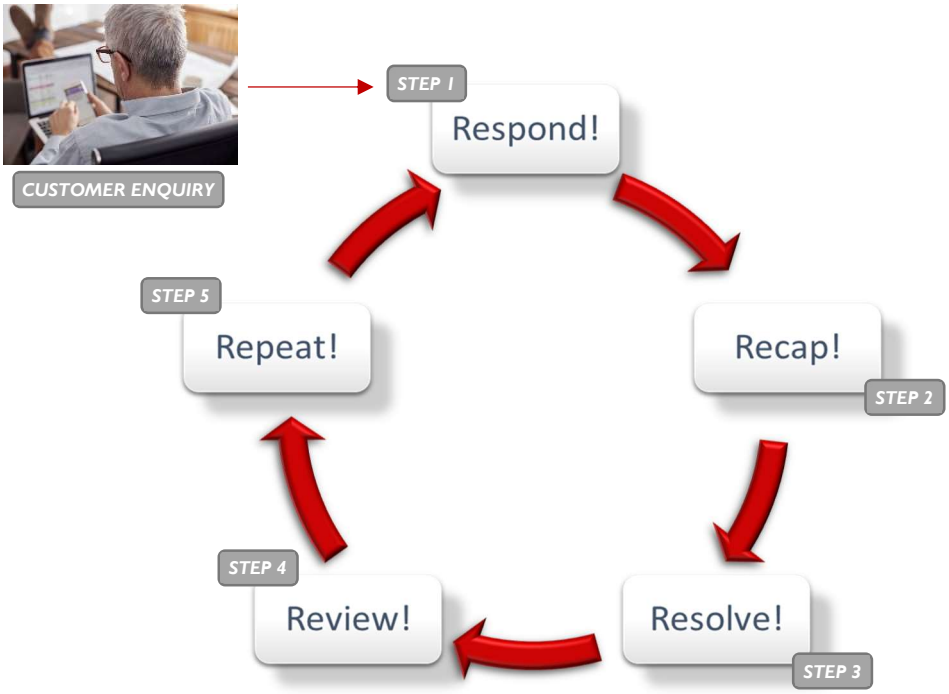
impact on the outcome (such as an uncommunicated change in the customer's expectations).

Systematic inclusion of Step 5 ensures that you at least visit the topic of additional deliverables in all circumstances, whether you'd call the resolution of the customer enquiry a "hit" or a "miss." Consider instead that each outcome is simply an opportunity to do more, and plan to have a dialogue with your customer about those next steps.

Putting It All Together: the ACE It! Process

ACE It! is a straightforward, five-step process for addressing customer enquiries that is most usefully envisioned as a repeating cycle:

The ACE It! Cycle for Addressing Customer Enquiries



Does this mean that the five steps are not useful or valuable when the typical customer service process happens in a more linear manner? Or as a brief, discrete transaction more than a lengthier, drawn-out process? Absolutely not! But remember that new business today will hopefully become repeat business tomorrow, so the cyclical representation helps us to preserve a sense of service continuity and to step back into the process flow more seamlessly when that fresh enquiry happens.

The cyclical model also doesn't preclude the possibility that within the resolution of a single enquiry, we might take several passes through the ACE It! steps before we label the enquiry as "resolved."

This model also holds up across a range of time horizons for the customer service cycle. Sales transactions that are fully realized within seconds or minutes are just as compatible with this way of thinking as are multi-stage projects that take months or even years to complete.

The "repeat" step is a useful placeholder for scheduled, systematic outreach to past customers, with a goal to initiate new work. The enquiry which catalyzes the entire ACE It! process doesn't have to originate from the customer or the client, it can come from within! Following this service cycle and triggering the enquiry from your side of the business relationship is simply another equally valuable way to kick things off, and this sort of proactive approach should be factored into your business model.

A Final Thought

Returning to Dr. Carstensen's work for a moment, it's worth noting an observation that emerged from her work on aging: that there is also an apparent age factor at play in this tendency to emphasize the negative.

"We think what happens with age is that younger people, because they have these long and nebulous futures, really need to collect a lot of information, and so they remember many things that will possibly help them manage those futures. The older people get, the more they're able to live in the present; and so, focusing on positive information makes that present feel good." [1]

How does this play into our use of the five-step ACE It! process? It means that we must never forget to understand and accommodate our audience in any sort of communication, including customer enquiries, and we must tailor our use of tools and our mode and message to resonate with that customer, who is as unique as those individual touch-point interactions themselves.

Don't bank on cruising through those interactions with your senior customers or clients, expecting them to give more weight to our past performances and thereby forgiving quickly if we make a misstep this time around. And conversely, no need to dread that enquiry from the junior customer, believing that the slightest miscalculation will mean a withering of that metaphorical garden we're working so hard to cultivate.

Do recognize that the fundamental characteristics of your audience, including seniority, may play a part in the psychology of their interaction with you and the long-term effects of that interaction on the health of your professional relationship. Be deliberate in your customer service practices. Be intentional with your process. Adjust your approach, adapt to your circumstances, and in all instances, plan to ACE It!

Citations

1 - "Why we often remember the bad better than the good," Caren, A., *Washington Post*, Nov. 2018.

2 - *Emily Post's Etiquette*, Post, L. and Daniel Senning, 19th edition, 2017.

3 - "Under Promise, Over Deliver," Peters, T., *TPG Communications*, 1987.

4 - Patton Family Archives, Wenham Museum, Wenham, Massachusetts.