

## TO THE INSTRUCTOR







This *Leader's Guide* provides guidelines for classroom delivery of the Customer Service Representative Training. It discusses basic principles of quality customer care, specifically as it relates to:

- USN Standards of Customer Care Excellence
- Telephone Courtesy and Skills
- Achievement of Customer Satisfaction.





This *Leader's Guide* doesn't provide a detailed script of everything you should do and say. Instead, it presents a framework around which you can build your training presentation, with recommended role plays, group activities, case studies, and self tests that promote discussion about and practice in the professional conduct expected of a USN Communications Customer Service Representative. Each participant is issued a *Student Guide* that follows this learning framework.

### Icons

The following icons are used in this document:

| Icon  | What It Means  |
|---|--|
|  | <b>Checklist of things to do</b>                               |
|  | <b>Time allowed for this chapter</b>                           |
|  | <b>Pointer, tip, instructions, or strategy for the trainer</b> |
|  | <b>Use flip-chart</b>  |
|  | <b>Project and explain PC presentation slide</b>               |
|  | <b>Lecture - Use notes from this <i>Leader's Guide</i></b>     |

## Icons (continued)

| Icon  | What It Means  |
|---|--|
|  | <b>Discussion</b>  |
|  | <b>Ask for student questions</b>                         |
|  | <b>Refer to the <i>Student Guide</i></b>                 |
|  | <b>Exercise (e.g., role play, case study, self-test)</b> |



## Equipment & Materials

Assemble the following equipment and materials before you begin:

- Data-show projector and a PC, for the instructor only
- Flip-chart, with at least 1 black or blue marker, to list discussion points
- Student Guide*, 1 for each participant.



## Pre-Training Preparation Checklist

- Obtain names of all class participants
- Verify that your PC is in working order and that slides can be properly displayed
- Verify that all of the equipment and supplies you need are in the classroom and in working order
- Verify that sufficient copies of the *Student Guide* are available at the training site.

## COURSE OVERVIEW



Allow approximately 30 minutes, from “Introducing Yourself” through “Course Objectives.”



### **Introduce Yourself**

- Provide name, job title, relevant work experience
- Encourage participants to feel free to ask questions and participate to their fullest extent
- Emphasize this is a workshop to develop effective telephone skills and overall professionalism expected of USN Customer Service Representatives.



### **Cover Class and Housekeeping Topics**

- Duration of class
- Breaks
- Lunch
- Location of the following:
  - Restrooms
  - Where to get refreshments
  - Telephones.



### **Icebreaker**

- Ask participants to introduce themselves to the class with:
  - Name
  - Job, Title, Affiliation
  - Prior work experience
  - Expectations for this training class.



## Introduce Course



## Purpose of Training

“Our company’s success in marketing world-class telecommunications products, services, and systems in large part depends upon your success in quickly and successfully satisfying customer needs. This training program provide the means for you as a USN Customer Service Representative to achieve the highest levels of quality customer care in taking orders, answering inquiries, and solving problems.

“Today, we will cover three interrelated topics:

- Defining Quality Service – Our Standards of Customer Care Excellence
- Developing Effective Telephone Courtesy and Skills
- Attaining Complete Customer Satisfaction through *Achievementality*.”



## Review the *Student Guide*






Ask participants to open *Student Guide* and turn to “**Table of Contents.**” Explain that the *Student Guide* is:

- Both a textbook for today’s course and an ongoing job reference after the course is over
- Theirs to keep; note taking is encouraged.



Ask participants to turn to the “**Introduction**” in the *Student Guide* and follow along as you explain the icons used in the *Student Guide*:

| Icon  | What It Means  |
|---|--|
|  | <b>Learning Objectives</b>   |
|  | <b>Discussion Notes (blank pages for you to record your own notes regarding key points concerning class discussions)</b> |
|  | <b>Exercise (e.g., role play, case study, self-test)</b>   |



Instruct participants to follow along in their *Student Guides* with each topic as you proceed through the course. Begin with a review of the Course Objectives.



## Course Objectives



## Course Objectives

- ◆ Define the “Customer Care Standards of Excellence” expected of all USN Communications Customer Service Representatives.
- ◆ Exhibit superior telephone skills and courtesy.
- ◆ Demonstrate the “Achievementality” required to deliver quality customer care and achieve 100% customer satisfaction.



Ask participants if they have any questions.



Refer participants to the module on “**Customer Care Standards of Excellence**” in the *Student Guide*.

## CUSTOMER CARE STANDARDS OF EXCELLENCE



Allow approximately 3 hours.



### Module Objectives



Refer participants to the “**Module Objectives**” in the *Student Guide*:

- List the attributes of good customer care
- Describe the professional skills required of USN Customer Service Representatives
- Identify how our “Customer Care Standards of Excellence” can be put into practice.



### What Do Customers Expect?





## Meeting Customer Expectations



The following is provided as a suggested dialogue to solicit from participants their own experiences – both good and bad -- in receiving customer service. The discussion serves as a springboard to define quality customer care. Elaborate and/or introduce other relevant examples without exceeding the allotted time. Board class answers as appropriate.

“How many people here have ever called a company’s 800 number? Who would you rather talk to, a person, or one of those “Press 1 if you have a touch-tone phone” conversant systems? Probably most of us would rather talk to a person. Why?”



### Possible Answers:

- **More personal communication**
- **Greater likelihood of getting your problem solved, or at least reassurance problem is solvable**
- **Don’t have to go through various menu levels to make proper selection, if a proper selection is even available**
- **Less frustrating, doesn’t require user to know how to do anything other than state problem**
- **People want to talk about their problems/needs to another person, not to a machine that can’t empathize or make suggestions.**

“This is not to say that there isn’t a place for conversant systems, just that when customers speak to a Customer Service Representative, they’re expecting to be helped. Or maybe they just need somebody to yell at.”





## Meeting Customer Expectations *(continued)*

“Ever call a customer service number all set to demand immediate satisfaction? You’ve practiced for hours what you’re going to say, and, by golly, you’re not going to let them get away with anything! You’re ready for an argument. What happens if you don’t get one? What if the Customer Service Rep agrees with you, and, what’s more, tells you they want to help you solve your problem?”



### Possible Answers:

- **Pleasant and unexpected surprise**
- **Want to hear more**
- **Impressed that somebody wants to help you**
- **Likely to tell others of positive experience**
- **Greater likelihood to continue to use service/product and recommend to others.**

“What are your own general expectations when you deal with customer service?”



### Possible Answers:

- **Prompt, courteous response to take order or correct problem.**
- **Truthful, knowledgeable answers**
- **Sense that somebody wants to help you and is responsive to your needs**
- **Confidence that Rep can fulfill your request**
- **Product/service is properly delivered as you request.**



## Responding to Customer Needs

“Consider this scenario: Your credit card company continues to charge you an annual fee. You decide this is ridiculous and call the 800 number to cancel. You’re ready to tell somebody off that this company has got a lot of nerve charging a fee when so many other companies don’t. Here are a some ways the Customer Service Rep might respond. Which are the best responses and why?”



Refer participants to *Student Guide* for sample responses; discuss together as a class or have participants comment on them individually or in small groups and then reconvene for a class discussion:

1. *“Yeah, I can’t believe people pay these fees, either!”*

**Clearly the wrong response, even if the Rep is empathizing with the customer, though that empathy does nothing to retain the customer. This comment also implies that company thinks its customers are stupid, certainly not the impression you want to convey.**

2. *“Okay, I’ll cancel your card, immediately. Have a nice day.”*

**Rep is polite, but that’s about it. Customer is lost.**

3. *“I’ll cancel that card for you right away. Is there anything else I can do for you today?”*

**Better. At least the Rep asks if something can be done for the customer. But shouldn’t the company be telling the customer what it can do, not wondering what ideas the customer might have? If customer doesn’t take initiative to explain needs, customer is lost.**



## Responding to Customer Needs *(continued)*

4. *“I’ll be happy to cancel your card, but are you aware of the advantages of our card (e.g., lower monthly interest rates or higher credit limits) compared to no-fee cards?”*

**Now we’re getting somewhere. Immediate request can be satisfied, but Rep is prepared to explain why that may not be to customer’s advantage. Tone is professional, non-argumentative. Rep is engaging customer in dialogue to define customer needs.**

5. *“I can cancel that card for you right away. Would you be interested in applying for our no-fee card. I can make all the necessary arrangements for you right now to activate it, it’ll only take a few moments of your time and I can have a new card to you within three business days.”*

**Rep fulfills customer request and immediately offers a workable alternative to fill stated needs. Rep is a problem-solver.**



Ask participants if they have any questions.



Take a 15 minute break.



## Achieving the “Wow” Effect



## “Wowing” the Customer = Competitive Edge

“For all the talk these days about the critical role of customer service to achieve business success, it is amazing how often it is poorly done, to the point where the company that provides fairly good customer service stands out in the marketplace. But in our highly competitive telecommunications business, being good isn’t going to be good enough. Just offering good prices for our products and services isn’t going to be good enough. We not only have to offer the best prices, but also the best customer service. Indeed, I’d go so far as to say that customer service is even more important than price. Customers are willing to pay more if they perceive that they are getting more value. Also, lower pricing that comes at the expense of shabby service in the long run ends up costing the customer more.”



**“Wowing” the Customer = Competitive Edge** *(continued)*


As USN Customer Service Representatives, your job in every customer contact is to achieve the *Wow Effect* – to display the level of professionalism, knowledge, responsiveness to customer needs, and problem-solving aptitude that causes customers to say, “**Wow**, I’ve never before gotten an issue resolved so quickly” or “**Wow**, these guys at USN really know their stuff” or “**Wow**, this is the first time I’ve been treated with such courtesy.” And not only will customers say this to themselves, but also to other potential customers. So you can see how your ability to achieve the *Wow Effect* directly affects the success of our enterprise. And the greater success we achieve as a company, the greater your personal success and the potential rewards you’ll earn.”



Refer participants to the section on “**Raising the Bar: Our Standards of Customer Excellence**” in the *Student Guide*.



**We’re Raising the Bar!**



*Customer Care  
Standards of Excellence*



**We’re Raising the Bar!**



## Raising the Bar: Our Standards of Excellence

“Our standards are high, but achievable by dedicated professionals committed to ensuring customer satisfaction and anticipating customer needs. We will not only set, but exceed, the world class benchmarks used to measure quality customer care in our industry, and thereby achieve competitive advantage. What you’ll be learning in the remainder of this course prepares you to achieve the USN Standards of Excellence that our customers will come to expect.”

### **USN CUSTOMER SERVICE REPRESENTATIVES:**

- **RESOLVE CUSTOMER QUESTIONS/INQUIRIES PROMPTLY;  
IF NOT IMMEDIATELY, THEN:**
  - ◆ CALLS RECEIVED BEFORE 12 NOON: BY THE END OF SAME BUSINESS DAY
  - ◆ CALLS RECEIVE AFTER 12 NOON: NO LATER THAN END OF NEXT BUSINESS DAY
- **TREAT CUSTOMERS WITH UTMOST COURTESY AND RESPECT**
- **PROACTIVELY SOLVE CUSTOMER PROBLEMS, IDENTIFY AND FOLLOW-UP ON NEW OPPORTUNITIES**
- **ARE DISTINGUISHED IN OUR INDUSTRY BY HIGH ENERGY, CONFIDENCE, ENTHUSIASM, AND PROFESSIONALISM**
- **BUILD RAPPORT AND DEVELOP TRUSTWORTHY WORKING RELATIONSHIPS WITH CUSTOMERS**
- **DIRECTLY CONTRIBUTE TO THE SUCCESS OF USN IN THE TELECOMMUNICATIONS MARKETPLACE**
- **EXCEED CUSTOMER AND INDUSTRY EXPECTATIONS FOR WORLD CLASS QUALITY SERVICE**



Ask participants if they have any questions.



## Personal Assessment

Ask participants to assess, either individually or in small groups:

1. What abilities they believe they offer to provide quality customer care, e.g., good listening skills, like to help people, etc..
2. What skills they might need to develop, e.g., not sure how to manage rude customers or unrealistic requests.



Reconvene class and ask for volunteers to share their self-assessments. Board answers. This serves several purposes:

1. Participants gain sense of “common ground” with shared strengths and weaknesses.
2. Obtain ideas for assigning participants to upcoming group exercises, e.g., you might want to pair people who describe themselves as “good listeners” with the “poor listeners” as a way for participants with weaker skills to learn from those more proficient
3. Gain a feel for overall class “personality” that may indicate areas of emphasis in remaining course material to be covered.



After completing self-assessments, take a one hour lunch break.

## EFFECTIVE TELEPHONE COURTESY AND SKILLS



Allow approximately 3 hours.



### Module Objectives



Refer participants to the “**Module Objectives**” in the *Student Guide*:

- Demonstrate professionally effective telephone skills
- Properly handle difficult customers
- Build customer trust, solve customer problems, and anticipate customer needs.



### Making the Right Connections



#### *Making the Right Connections*

Effective Customer Service Reps Are:

- ◆ Positive, Energetic, Enthusiastic, Courteous
- ◆ Knowledgeable
- ◆ Good Speakers
- ◆ Good Listeners
- ◆ Problem Solvers





## Develop a Positive Attitude

“Remember what your mother always told you about the need to make good first impressions. In many cases, customers’ first impression of USN Communications will be through their initial contact with you, the Customer Service Representative. If you’re positive and enthusiastic about helping customers, you’ll establish a good working relationship that easily translates into successful handling of customer problems.”



Refer participants to *Student Guide* for “**Four Techniques to Develop a Positive Attitude**” and review together as a class.

### ❶ The Greeting

*The greeting is critical:* it sets the tone for the entire interaction between you and the customer. It’s only natural for customers to feel that the way you answer the phone is the way you’ll handle their business. Each caller must be welcomed in a positive, upbeat manner. Common courtesy is even more important on the phone because the customer cannot see you – therefore your voice has to “smile.”

### ❷ “Nix” the Negative

*Avoid negative words.* Never say “we can’t” or “we don’t”. Suggest an alternative. Find a compromise. Say “yes” first, but follow it quickly with an alternative, for example:

“Yes, I understand that your new bill doesn’t have the same format as the bill you received from your previous telephone company. I’ll look into whether there’s some way we can customize it for you. In the meantime, perhaps I can go over the bill format with you and discuss where there might be some confusion. I’m sure that once you get used to it a bit, you’ll see that all the information you need is easily accessible.”



## Develop a Positive Attitude *(continued)*

### ② “Nix” the Negative *(continued)*

Some words and expressions just sound negative, even if they really aren't. For example:

**Instead of ...**

“It's company policy...”

“You must” or “You should” or “You are required to”...

**Say...**

“We normally handle a situation like yours by...”

“We would prefer that you...”

### ③ Telephone “Tone”

Many times it is not what you say, but how you say it. Your voice should at all times reflect sincerity, pleasantness, confidence, and interest. The concern you show your customers counts for as much as anything you are actually able to do for them.

### ④ “Go For the Gold”

Treat every call as a challenge. Each caller has a special set of problems and questions that it's your job to help with. Approach each call in the spirit of a competition in which you win by helping your customer and “cross the finish line” together.



## Positive Handling of Angry Customers

“Of course, it’s hard to maintain a positive attitude when callers have a negative attitude. But it can be done. Like it or not, you will have to deal with angry customers – sometimes the anger may be the justified result of an error on our part, sometimes it might be the result of customer misinformation or unrealistic expectations, sometimes it’s just because some people like to act that way. In any event, it is your job to turn a negative call into a positive experience for you both. Here’s a few tips how:”



Refer participants to *Student Guide* for “**Positive Handling of Angry Customers**” and review together as a class.

### ❶ Stay Calm

*Don’t react.* When confronted with an angry (or, worse, irrational) caller, everyone has the urge to respond in kind. But don’t fight back – if anything, that will make the customer even more angrier. In the line of fire, you must remain calm; moreover, you must attempt to calm the customer by identifying and responding to the source of the anger.

### ❷ Let Them Vent

*Defuse the anger.* You can’t get customers to deal with the logic of a situation until you deal with their emotions. Trying to attack problems before people have fully vented their anger or disappointment simply doesn’t work. Once a tirade begins to wind down, ask sincerely, “Is there anything else?” By this point, the caller probably feels better -- or is at least “talked out” – and is probably more receptive to a rational discussion of the problem.



## Positive Handling of Angry Customers *(continued)*

### ③ What Do They Want?

*What can you do to correct the problem and change a negative customer experience into positive results.* Once they've calmed down, it is most constructive to say, "I understand you're angry about this problem. What can we do to fix the problem for you?" What you can do depends upon the nature of the problem and the steps you are clearly authorized to take. Sometimes, the best solution ends up being the one the customer suggests. (This might even be less than you were willing to offer, e.g., a 25% discount on unsatisfactory services as opposed to the 35% you are authorized to offer.)

*Never promise what you aren't sure you can deliver.* This will only result in making customers even angrier. In cases where the customer makes unreasonable demands, try to state the company's position and work towards a fair resolution. ("I'm sorry, I understand that you believe you've been overcharged, and I can credit your account for the disputed amount immediately. But I can't refund your entire bill. It's not as if your service was interrupted at any time, and you are receiving considerable discounts by being a USN customer. I think we're being fair in refunding what you believe to be an overcharge; I don't think it's fair for us to give away service that we are entitled to bill you for.)

### ④ Don't Say You Have to Talk to Your Supervisor First

Treat every call as a challenge. Each caller has a special set of problems and questions that it's your job to help with. Approach each call in the spirit of a competition in which you win by helping your customer and "cross the finish line" together.

## ④ Don't Take It Personally

Despite what callers may say or sound like, they don't know you. Don't let the fact that a caller was upset with a situation and may as a result be rude or impatient upset you. Otherwise, you'll become an emotional basket case. Try not to let a "problem" call spill over to the next call – take a deep breath, square your shoulders, and move on.



## Greeting the Customer

“Consider this scenario: Your credit card company continues to charge you an annual fee. You decide this is ridiculous and call the 800 number to cancel. You’re ready to tell somebody off that this company has got a lot of nerve charging a fee when so many other companies don’t. Here are a some ways the Customer Service Rep might respond. Which are the best responses and why?”



Refer participants to *Student Guide* for sample responses; discuss together as a class or have participants comment on them individually or in small groups and then reconvene for a class discussion: