
Customer service is a **sales opportunity**.

Handled as an account management function of the sales department or by another department altogether, customer service is **another opportunity to enhance** your company's relationship with existing customers and prospects. To improve service is to improve the experience at **each and every point of interaction** that customers and prospects have with your company. (For simplicity throughout this guide, customers and prospects will be referred to only as customers. Both should be treated equally well because it's the right thing to do. But remember, customers keep the lights on.)

Remember, quality customer service is defined by the individual experiencing it, not you (and perception is reality). Your goal is to exceed expectations (you're a Smover, aren't you?)

The customer service checklist is your guide to **deliberately** identifying your points of customer interaction and scripting the experience – orchestrating something wonderful (mediocrity is for your competition and the airline industry). It begins by identifying the points of interaction and then asking...

1. What does the **customer want** at this moment?
2. What experience does the company want to provide the **customer**?

And remember, it's not only the people in sales and customer service that can get, lose, or retain a customer. It's everyone.

Be sure to radiate the sales culture.

THE CUSTOMER SERVICE CHECKLIST

Before the sale...

Identify all possible points of interaction between your prospect/ customer and your company before the sales process even begins...

- Brochure received
- Letter received
- Telephone call answered
- Others?

As a team, identify your points of interaction and decide what experience you want your customers to have at each point. Write down what you feel that experience should be and create a script to orchestrate the desired outcome. For example...

THE CUSTOMER SERVICE CHECKLIST, continued

Interaction: Inbound telephone call

Experience: All inbound calls are answered before the third ring with a pleasant greeting (smiling) using the company name and the person's first name.

"Thank you for calling ABC. This is Tom. How can I help you?"

Some thought prompts to help you...

- How easy is it for customers to contact the correct department/ person/ office?
- How easy is it for customers to contact your company by phone/ fax/ email?
- Is your phone number clearly listed on all your collateral materials, including your web site (on all pages)?
- How quickly is the phone answered? Does everyone strive for the same standard (e.g. all inbound calls will be answered before the third ring)?
- Are customers greeted with a smile (on the phone or in person)?

Join the thousands of **Smovers*** who've learned the simple (and fun) way to achieve **better work, better relationships, and better results** with the 3-minute video at **SmileAndMove.com/Video**



be happy. do something.™

***smover** ('smoov-er) **noun:** 1. a person who smiles and moves 2. someone who matters to the world, all with a smile

THE CUSTOMER SERVICE CHECKLIST, continued

During the sale...

Identify the typical interactions between your customers and your company during the sales process...

- Need account information to place an order
- Asks about product
- Asks about delivery times
- Others?

As a team identify the typical interactions during the sales process and decide what experience you want your to have at each point. Write down what you feel that experience should be and create a script to orchestrate the desired outcome. For example...

Interaction: Customer doesn't remember her account number

Experience: People are trained how to efficiently look up an account number using another piece of information.

"That's not a problem. Would you mind confirming the spelling of your company name for me?"

Some thought prompts to help you...

- Are your people smiling and pleasant throughout the process? (Are they Smovers?)
- Are your people fully attentive to the customer?
- Are your people efficient in conducting the transaction?
- Are your people trained to "lead" customers through the transaction so it's easy for the customer?
- Is the transaction process efficient? Does it require unnecessary information or duplicate information?
- Is the customer ever required to wait too long to finish the transaction?
- Do your people sincerely thank customers for the transaction?

Script the desired experience for the top three transaction types and common interactions. Train your people who handle these interactions on how to deliver the ideal customer experience from greeting to thanking the customer for the order.

THE CUSTOMER SERVICE CHECKLIST, continued

After the sale...

Identify the typical challenges or mistakes that might occur after a sale...

- Order received incomplete
- Order did not arrive yet
- Account was over billed
- Others?

Create scripts for how each of these typical problems should be handled. Remember that with problem resolution, each problem is unique and the process should include opportunities for your people to handle the problem efficiently (by doing things right) and serving the customer effectively (by doing the right things). For example...

Interaction: Customer calls with a technical question and can't find the right person to help

Experience: People are trained to handle the call with a sense of urgency and minimize downtime for the customer.

"I'm sorry we've not made it easy for you. I'm going to personally make sure I find the correct person for you. Would you like me to call you back in five minutes or do you want to stay on the line while I do this?"

Some thought prompts to help you...

- Does the resolution process begin with a sincere apology? (I'm sorry you experienced that. I'm sorry the purchase didn't meet your expectations. I'm sorry, I'll take care of you.)
- Are your frontline people trained to solve basic problems?
- Do your frontline people know how far they can go to resolve problems?
- Do your people take ownership of the problem and ensure it's either handled or personally make sure the correct person handles it?
- Do your people listen attentively (never interrupting) and apply that information to the resolution? (This helps make the customer feel understood and better served.)
- Does the process make sure your people are communicating next steps to the customer and explain how the problem will be resolved?
- Is there a sense of urgency to the resolution process?
- Do representatives make and keep commitments (no matter how small)?

Remember, sometimes it's how well you handle a mistake that creates a loyal customer.