

Downloadable

Leader's Guide

Secrets to Keeping Our Customers Happy!

presented by
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Subscribe to Ruby's FREE electronic newsletter: **Great Customer Service for Leisure Professionals** or purchase Ruby's book, **Blueprint for Success**, co-authored with Ken Blanchard and Stephen Covey by sending an email to info@RubySpeaks.com.

Thank you for purchasing this training system. I am confident that it will help you take your organization to the next level in serving your customers. It was designed to make it easy to deliver yet filled with content and concrete ideas that you and your staff can implement right away.

This program is a culmination of over 15 years of tweaking this particular program for it to be most effective. Over 400 agencies have received training on this material and I can assure you that we have weeded out anything that didn't work and beefed up everything that offered valuable insight in improving customer service inside and outside your organization.

To get the most from this program, I recommend that you preview the entire series and follow along with the leaders guide, making notes of key elements you want to emphasize.

Visit www.RubySpeaks.com/CSDVDHandouts to download the following information:

- Sample invitation to use to announce the training session
- Ruby's Checklist for a Successful Staff Training Session
- Leader's Guide
- Handouts for the entire 5 module program (Black and White or Color Version)
- Certificates that can be printed for participants after program completion
- Ruby's Customer Service Articles that can be used in staff newsletters or staff meetings
- Evaluation form for offering feedback to Ruby about this program

You may want to offer all five modules at one time or break it into smaller learning sessions.

Our wish here at RubySpeaks is to support your efforts to improve Customer Service in every way so please be in touch and let us know how we can help. Enjoy the program.

Sincerely,



P.S. Ruby has a special gift for you when you complete the online evaluation form and fax it back to 303.904.2966.

Table of Contents

Forward	4
Opening remarks.....	5
Legal Overview	5
About Ruby	6
Materials Included with this package	6
Program Insight.....	7
Suggested Formats for Training	7
Tips for Success.....	7
Leadership's Involvement in the Training.....	8
Opening Remarks Sample Script.....	8
Ruby's Checklist for a Successful Staff Training Session Preparing for the Training Session	9
<u>Completed Handouts for Each Module with additional Hints.....</u>	<u>13</u>

Forward

I have dreamed about this DVD training program for so long and it is only appropriate that I take a few lines to say thanks to all those who made it a dream come true. Here are my thank you's:

First of all I need to acknowledge every client I have worked with over the last 15 years. Each experience you shared with me helped my expertise grow into wisdom. You fueled my passion and made me a better teacher through the opportunity to learn and grow with you.

To Dick who gathered the team to shoot this video. You hand picked the best and it made the project run smoother than I ever imagined. Get well my friend – we miss you.

To Jason who literally converted his recording studio to a video studio to make the filming possible. Your patience, support and passion for excellence showed up with every visit.

To Fred who stretched his learning curve to the outer limits by taking his vast knowledge of the art of video and turning it into a new dimension through this project. Thanks for your unwavering persistence to make it all perfect.

To Carol who worked on a very tight time schedule once I figured out what graphics I wanted. Your vision for “Branding” is everything Dick promised it would be. Thanks for giving my documents and covers that professional look! Your creativity rocks!

To Shawn who taught me the fine art of IMing as we bantered back and forth into the wee hours of the morning getting all the DVD information posted on the web. Thanks for being such a nice geek to work with!

To Julie who runs the office and most of my life, you are so good at covering the details so I can do what I do best. Thanks for keeping me where I need to be when I need to be there. You are a true friend and exceptional assistant.

To Michele who keeps me booked and out in front of all the right people to touch lives every day. Your ability to juggle it all never ceases to amaze me! I hope those 4 young sons of yours know how talented their mom is!

To Lori, Jill, Molly and Shawn who painstakingly proofed everything over and over and offered feedback every step of the way. Thanks for being such great cheerleaders!

To Joanne, my sister, who reminds me everyday how proud she is of me and how mom is smiling at us both from heaven.

To Rich, the most supportive spouse a woman could ever dream of. You make every day special! Thanks for all you did so I could focus on this project. You truly are my knight in shining armor. Here's to another great 20 years together at least!

Opening remarks

“Your employees will treat your customers like you treat your staff.”

So as you embark on this training program please remember to be a positive role model throughout the training. Your approach can offer a great example of how you expect your employees to represent your organization to each and every one of your customers.

Just like your business, relationships with your employees are based on day-to-day interactions. With that in mind, I have laid out a step by step plan to set you up for success. Please use the following guidelines to develop a successful training program for your employees.

Legal Overview

And now for some legal stuff . . .

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DVD Module 1-4 Secrets to Keeping Our Customers Happy! ISBN 978-1-60643-313-3-90000
DVD Module 5 Ruby's Tips for Promoting Positive Internal Customer Service ISBN 978-1-60643-314-0-90000

About Ruby

RubySpeaks, Inc. is a Littleton, Colorado based staff development company that specializes in promoting excellent customer service. This program is presented by our founder and president, Ruby Newell-Legner. Through teleseminars, webinars, live presentations, audio recordings and now DVD, Ruby has helped tens of thousands of organizations increase revenue, improve customer satisfaction ratings and encourage more contented employees once they have the skills to succeed. To check Ruby's availability to present a live program for your group, please contact our office at 303.933.9291 or info@RubySpeaks.com or by visiting www.RubySpeaks.com. At RubySpeaks, we believe that employees make the difference in customer service. We have designed this program to support you in your endeavors to excel.

Materials Included with this package

Module 1 Seven Star Customer Service

15:30 minutes

Examine what Seven Star Service can look like for your organization.

Module 2 Understanding Our Customers and Their Loyalty

22:30 minutes

Explore what your customers want and why they complain so you can meet their needs and avoid their complaints.

Module 3 Communicating with Our Customers

19:30 minutes

Learn how the SOFTEN Technique and carefully choosing your words can build trust and rapport with your customers.

Module 4 Dealing with Upset Customers

21:30 minutes

Discover the right mindset and approach for calming challenging customers that will turn them into life-long advocates.

Module 5 Ruby's Tips for Promoting Positive Internal Customer Service 31 minutes

Cultivate an encouraging workplace by following Ruby's principles of positive communication, support and teamwork. Productivity and morale will improve when internal customer service is embraced, endorsed and strategically planned.

Viewers will learn:

- Steps to creating a reputation that embraces camaraderie
- Tips for stopping gossip and rumors
- Techniques for dealing with a whiner/complainer
- Guidelines for decision-making to ensure support
- Tactics for choosing a positive perspective

Total Time without activities**110 minutes**

Program Insight

This DVD-based program is a good starting point, but it doesn't stop there. We recommend that you continue to revisit customer service in the following ways:

- Design a hiring process that selects new employees for their awareness in customer service skills and their desire to shine for each patron.***
- Clarify customer service standards for each position and make sure those expectations are shared with each staff member before they begin working.***
- Review a customer service topic during every staff meeting.***
- Share Ruby's customer service articles in staff newsletters.***
- Work side by side with new employees to make sure they understand what is expected of them regarding customer service.***
- Include specific customer service skills when evaluating each employee's performance during the staff evaluation process.***

Suggested Formats for Training

EMPLOYEE ORIENTATION:

This program is a great way to introduce new employees to your expectations regarding customer service. Use it to set the employee up for success by outlining specific customer service skills and techniques. Module 5 on Internal Customer Service will be exceptionally helpful for new employees as it asks them to contemplate what new reputation they want to start at their new place of employment.

SEASONAL TRAINING

The program was designed to be used as one 2-hour training program or broken into smaller 15-30 minute segments which are ideal for Seasonal Training. This format will help you set your new employees up for success as well as review techniques for returning staff.

STAFF MEETING TOPIC REVIEW

The individual modules for this program are perfect for discussing at a staff meeting. Take one module at a time and use it to catapult discussion on improving customer service.

Tips for Success

On average, adults can listen for attention for 90 minutes, however, retention diminished sharply after 20 minutes. So I designed the modules to be short and allow for discussion or activities in between sections. Please remember that interaction and discussion will help participants remember the material more readily when you are planning your delivery.

Adult Learning Theory indicates that learners need to be active and involved in the learning process. There are a variety of ways to do this including: games, exercises, activities, stories and videos that encourage participation and involvement. I also designed the handouts so they fill in the blanks as they follow along the program. Utilizing these strategies helps to enhance the transfer of learning process.

Adults Need to know why they should learn something so your opening remarks should motivate them to listen, take notes and be attentive during the sessions. Discuss ways the training will help participants improve job performance.

Adults learn through practical application so use the exercises outlined on the DVD and in the Leader's Guide. Provide reinforcement tools by implementing a recognition program and distributing certificates of completion at the end of the course.

Leadership's Involvement in the Training

If other leaders within your organization are invited to attend the session, I highly recommend that you encourage them to be involved in the training as well. Don't allow them to just sit in the back and observe. Remember, the leaders can offer a positive example of being open to learning so encourage them to sit with their group and follow along in the handout and do the activities right along side the other participants.

Opening Remarks Sample Script

The most important 60 seconds of your presentation is the first 30 seconds and the last 30 seconds. Positive opening remarks will set the stage for learning and closing remarks will help participants use the information to improve their performance. Here is a sample script that you may find helpful:

"Hello, My name is _____, I am the (your position or title). I would like to welcome you to today's program on "Secrets to Keeping Our Customers Happy!" We know how challenging your responsibilities are so we have invested in this program to make your job easier. As you listen to Ruby's specific tips and insight, be thinking how you can use these skills to succeed on the job. We take customer service very serious here at _____(name of organization) and those who excel in delivering positive customer service are the employees who are considered for promotions and an increase in pay. So I invite you to listen up to get some great tools and work on your next raise."

You might not want to use those exact words, but make sure your comments are positive, inviting and reinforcing of the material to be covered. Remember, they will be watching you to deliver positive customer service to them as well.

Ruby's Checklist for a Successful Staff Training Session

Preparing for the Training Session

- ☑ Review past seasons and determine what your focus will be for training this season.
- ☑ Gather input from department heads or key leaders. Determine the focus for the training, specific topic or general orientation.
- ☑ List the specific results you hope to achieve from the training. Answer these questions to help you determine the agenda: After the training is over,
 - ☑ What do we want the participants to know? (Information in their heads)
 - ☑ What do we want the participants to feel? (Attitudes)
 - ☑ What do we want the participants to do? (Skills and actions)
- ☑ Use answers to the questions above to outline your training program.
- ☑ If necessary, break the results into groups and assign committee chairs for each group.
- ☑ Identify and list experts in the areas you are seeking results. (In-house leaders, outstanding staff examples or outside experts in the field)
- ☑ Identify selection process for presenters. (Credibility, expertise, and ability to present)
- ☑ Clarify expectations for each presenter. Specify how long they are to speak, the end results you are looking for and any specific guidelines you have for trainers.
- ☑ Choose a location that is conducive to learning. (Consider proximity, cost, flexibility, accessibility, meal service, parking, smoking policy, experience, and access.)
- ☑ Select the best type of meeting room. (Consider atmosphere, layout, furniture, convenience, lighting, noise, outlets, heating and cooling, telephone access.) Provide hardback writing surface if needed.
- ☑ Identify the best date and check meeting room availability.
- ☑ Insure the learners are "Invited" to attend. An invitation will get better results than the "Mandatory Training" Memo. Promote excitement about attendance. Share the agenda with them in the invitation so they know what to expect. Don't share a specific breakdown of times, but be sure to include start and end times so they can plan accordingly.

Ruby's Checklist for a Successful Staff Training Session (continued)

- Invitation should include all the details like, when, where, how long, agenda, meal details, where to park, specific entrance of the building if working in a large facility. Extend the invitation for attendees to submit questions before the training to make sure you cover their answers.
- Request an RSVP to gain buy-in from each attendee and to confirm numbers of participant for handouts, seating and food order.
- Invite key leaders from your organization to attend the training all day or at least to be introduced and to say a few words at the beginning. If they stay through the program, encourage all leaders to jump right in and be a participant to demonstrate that "everyone" needs trained.
- If a number of departments or locations are bringing their staff together for the training, coach the department heads or managers to prepare their people for attending the training. Have managers cover objectives before the training with each trainee they send.
- Arrange for food and beverages.
- Prepare any materials for meeting. (Pencils, nametags/name tents, handouts, evaluation form)
- Arrange for signs, if needed, to direct participants to the training session.
- Arrange for AV equipment and confirm room set up.
- Confirm site arrangements.
- Arrange for transportation and parking permits (if necessary).
- Prepare nametags or name tents and a list of attendees in alphabetical order to easily check them off as they arrive.
- Give final meal count and take care of any concerns with food, beverages, room and equipment.

Ruby's Checklist for a Successful Staff Training Session (continued)**Day of the Training Session**

- Arrive early and inspect the room for correct set-up.
- Familiarize yourself with room logistics. Know where fire exits and extinguishers are. Locate restrooms, phones, and elevators or stairs.
- Have backup equipment and backup plan in case of failure.
- Set aisles bigger as they get nearer exits.
- Seat for least distraction audience members should not have to cross more than six others to get to a seat.
- Force audience to front with reserved signs or put out less chairs than the expected attendance. Stack additional chairs in back corner of room so they are handy if needed.
- Arrange for a good sound system. Thoroughly check sound system BEFORE program.
- Check climate. Locate climate controls or know who to call.
- Make sure water and glasses are available.
- Make sure there are signs posted to direct participants to your room.
- Set up "check-in" table.
- Double check equipment and supplies. Make sure there is power to the speaking area for AV equipment and provide a visible clock to presenters so they stay within their time frames.
- Create a friendly and collegial atmosphere. Be prepared before anyone gets there.
- Welcome participants as they arrive. Have their materials set out for them to pick up as they enter.
- Opening remarks should be upbeat and positive. (see examples in the Leaders' Guide)
- Explain the agenda in the beginning so people know what to expect.

Ruby's Checklist for a Successful Staff Training Session (continued)

- Introduce presenters and leaders in the organization so people know who is who and what role they play in the organization. If there are other presenters, offer why they were chosen to present their topic.
- Create an opportunity for everyone to get to know their co-workers.
- Orchestrate an icebreaker exercise or activity to help participants mingle and get to introduce themselves.
- Maximize audience participation. During the training, get everyone involved. Adults won't just sit still and be spoon-fed information. They want to participate.
- Offer repetition without it being repetitive. Review the information in a variety of formats.
- Use a game format to energize the learning environment. Good examples are versions of Jeopardy, Trivial Pursuit, and Survivor.
- Encourage small group activities so that participants all get a chance to talk.
- Utilize the DVD as a visual aid to increase retention, it's "Velcro for the mind." Use flipcharts, magic tricks, demonstrations, and PowerPoint to reinforce your message.
- Offer bonus information for those who would like to take the topic further than time allows.
- Distribute and collect evaluations.
- Thank everyone for attending.

After Training

- Create a way to review what they learned after the training. (Newsletters, staff meetings, kiosks, bulletin boards and quizzes)
- Create a recognition program to reinforce the new skills that were taught during the session. (see examples in the Leader's Guide)
- Keep track of topics to add to next years training as the season progresses.
- Schedule post-season debriefings with the participants to identify what went well and what should be changed for future training sessions.

Handout with Blanks Filled In

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Secrets to Keeping Our Customers Happy!

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Ruby Newell-Legner, CSP
Speaker • Trainer • Author

Ruby Newell-Legner founded RubySpeaks, Inc. in 1994 with a singular mission: To provide the hands-on training employees need to create a more productive work environment where everyone can excel on the job. Over the last decade, she has presented more than 1,700 programs in nine countries and has shown tens of thousands of participants how to quickly improve workplace performance.

Ruby helps organizations like yours build strong teams between front line staff and management, and make exceptional customer service a way of life. She is a Certified Speaking Professional, a designation bestowed by the National Speakers Association to less than 400 speakers in the world.

As an award-winning, international speaker, Ruby works with organizations to build better relationships: from front-line employees to customers, between co-workers and their peers, and from managers to the employees they supervise. She helps participants refine skills that make relationships work.

Ruby's high-impact trainings are based on 25 years as a front-line service provider and manager. She has provided training for more than 300 government agencies throughout North America and with the United States Armed Forces around the globe. She was chosen to train the staff to host Super Bowl XLI, the Grey Cup (Canada), the USTA US Open and the 2010 Olympics. Her clients range from NFL stadium management staff to leaders in municipal government to Jumeirah Group, the United Arab Emirates, Dubai-based luxury hospitality group known for its outstanding customer service.

Ruby has worked together to build workplace learning programs for some of the largest, most recognized organizations in the world. Her track record in satisfying clients is identified by the number of clients who have hired Ruby again and again to provide training for their staff.

Her programs include:

- Secrets to Keeping Our Customers Happy!
- Ruby's Tips for Promoting Positive Internal Customer Service
- Supervisory Skills for Success *
- Leadership Strategies: Things you need to Know to Survive *NEW*
- Facing the Challenge of Challenging Employees
- How to Attract and Select Great Employees *
- How to Develop an Effective Employee Training Program *
- Encouraging Staff Development: The Performance Appraisal Process *
- How to Run a Successful Meeting
- Seven Star Customer Service (based on Ruby's work with the only 7 star hotel in the world)
- Understanding and Dealing with Change
- How to Work Effectively with Your Boss
- Reenergizing Employees by Redefining Organizational Values
- Networking Strategies: Building Professional Relationships
- Raising the Bar in Guest Relations
- How to Have a Successful Board - a program for non-profit Board of Directors *
- Reflections from the Rear View Mirror: Study your past to create your future

* These programs are available as Mp3 downloads at www.RubySpeaks.com



Watch for Ruby at the following Conferences:

- Association of Luxury Suite Directors (www.ALSD.com)
- Athletic Business Conference (www.AthleticBusinessConference.com)
- Camp Experience (www.CampExperience.com)
- International Association of Amusement Parks and Attractions (www.IAAPA.org)
- Illinois Professional Development School (www.il-ipra.org)
- International Association of Assembly Managers (www.IAAM.org)
- National Recreation & Park Association (www.NRPA.org)
- Stadium Managers Association (www.StadiumManagers.org)
- World Waterpark Association (www.Waterparks.org/convention.asp)

Module 1 Seven Star Customer Service

List how YOU can take YOUR business to the next level by applying lessons from the Jumeirah Group

List from Ruby's Slides

Anticipate every customer's needs

Make it easy and comfortable for them

Make each guest feel special and appreciated

Be knowledgeable of schedules, services and special events

Take pride in your job

Be courteous and polite

Think of the guest before you think of yourself

Ask participants to share their own as well

What Customers Want

1. To feel welcome.
2. To be heard.
3. To be comforted.
4. To feel important.



Why Customers Complain

1. They feel ignored or overwhelmed.
2. They feel ignored.
3. They feel they have to defend themselves.
4. They feel treated poorly in the past.
5. They have waited too long for service.

Module 2 Understanding Our Customers and Their Loyalty

True or False?

Note to leaders - please note that each sentence that ends with a ! is a False statement. When I was first learning the program, it helped me remember which ones were false. I left them in to help you remember as well. Note corrections on false statements to make them true below.

- T It costs six times more to attract a new customer than it does to keep an old one.
- T Customer loyalty is, in most cases, worth ten times the price of a single purchase.
- T A typical business hears from only about 4% of its dissatisfied customers.
- T The other 96% just quietly go away and 91% will never come back.
- F 13% of the people who have a problem tell 10 others! ***They tell 20.***
- F It takes 7 positive service incidents to make up for one negative incident! ***It takes 12.***
- T Seven out of ten complaining customers will do business with you again if you resolve the complaint in their favor.
- T If you resolve a complaint on the spot 95% will return and do business with you again.
- T On average, a satisfied complainer will tell five people about the problem and how it was satisfactorily resolved.
- F Of those customers who quit using your business, 51% do so because of an attitude of indifference by the company or a specific individual! ***It's 68% (and remind them to underline "a specific individual")***

Module 2 Understanding Our Customers and Their Loyalty

Small Group Activity Instructions -

Pause the DVD while you discuss the question below in small groups.

Remember to note things YOU can do - not what you think other people should do.

List as many ideas as you can and then determine your best idea to share with the larger group.

Notes

What can I do to meet the needs of our customers and prevent complaints?

Note to leaders - This is a great place to reinforce each participants' contribution so I recommend you say something positive after each spokesperson shares the "best" idea their group came up with.

Encourage everyone to clap after each person shares their idea, then offer more specifics on why that is so important after they finish sharing.

This will reinforce their contribution and encourage thinking about ways they can enhance their customer service delivery.

Module 3 Communicating with Our Customers

Building Trust and Rapport using the SOFTEN Technique

Note to leaders - After they finish listening to this section, you can pause the DVD and ask them to turn their notes over. Then ask them what each letter stands for one letter at a time. I usually offer visual hints as they recite the words to reinforce how easy it is to remember.

S *m i l e*

O *p e n P o s t u r e*

If time allows, ask them to discuss in small groups specifically when they can use the SOFTEN technique to promote better service or build stronger relationships.

L *e a n*

F *o r w a r d*

T *a n e* of *v o i c e*

E *y e C o n t a c t*

N *o d* to *A c k n o w l e d g e*

Building Barriers or Bridges



Popular Phrases

I'll try

Our policy

Your problem

You'll have to...

We can't do that

She's not here!

That's not my department!

That information is
in our brochure

I don't know

I am sorry you had to
wait so long

Better Options

I will

Our guidelines

The situation

The best thing to do is ...

What I Can do for you is ...

That person is not available at the moment,
How can I help you?

For future reference, the
person who handles that
service is ...

Let me show you where that information is in
our brochure

Let me find out for you

Thank you for being so patient

Module 4 Dealing with Upset Customers

Choosing the Right Mindset when Working with Challenging Customers

This list is from an article from Ruby's FREE electronic newsletter "Great Customer Service for Leisure Professionals" (sign up to receive your FREE copy of this newsletter at www.RubySpeaks.com)

1. View complaints as *gifts*
2. The customer is not always right ... but they are the customer and we want to keep them as a customer.
3. You can't take it *personal*.
4. Dealing with the person and their concern is your responsibility.
5. Let go of the *negative* Control your self-talk.
6. Stay calm and remember no one makes you *mad*
7. *Challenge* yourself to see how many upset customers you can turn around.
8. Work at gaining *loyal* customers.
9. Moods are contagious. Ask yourself, "What attitude am I conveying?"
10. Be prepared to *learn* from this opportunity.



*They can't "get your goat"
if you don't show them
where you hide it.*

Remember that you won't please everyone. Choosing the right mindset can make all the difference in how you feel about the customer and your job.

Module 4 Dealing with Upset Customers



10 Tips to Calming Upset Customers

Note to leaders - A great follow up tool for this section is to have prepared scenarios on worksheets for small groups to discuss. Encourage them to list what steps they would take to calm the customer down in each situation.

After the small group discussion, have them read the scenario for the bigger group and share their ideas on steps they would take to improve the situation based on what they learned in this module.

1. ***Listen*** and acknowledge that you are listening.
2. Move to a more ***private*** area.
3. Don't ***interrupt***.
4. Take ***notes*** as they speak.
5. Remember their ***name*** and use it.
6. Repeat back what you ***heard***.
7. Speak ***respectfully***.
8. Always respond with "***We***" instead of "I".
9. Apologize to the customer.
10. Resolve the situation ***quickly*** and in a positive manner.

2 Second Rule
In a conversation, let the other person count to two after they finish, before you start

Tips for my next promotion
"So what I am hearing you say is..."
"Let me see if I understand you correctly!"



Module 5 Ruby's Tips for Promoting Positive Internal Customer Service

Professional Image

Decide what you want to be known for. Then take full responsibility for creating your

reputation.

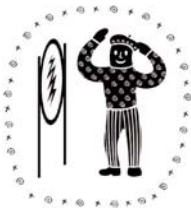


Leave the personal stuff at home



An Anchor –
Something to remind
me to work on
changing my habit.

Dress professionally to promote a positive impression
for you, your department and your agency.



Dress for the job you want not the job you have.
Does this outfit leave a positive professional image?



Remember - what you say about others says more about you than it does about them.

Be the one to stop the gossip labeling, complaining and blaming.



Resolve disagreements or misunderstandings before they become issues,
address the person directly.

Module 5 Ruby's Tips for Promoting Positive Internal Customer Service



Be the first to smile and say hello when passing in the halls. Look up - not at the floor. Someone needs your friendly greeting.

Be on time and prepared for meetings - whoever comes to the meeting most prepared - wins.

Include other people who may be affected by a decision you are about to make.



Making Decisions that Promote Positive Relationships



Questions to ask yourself before finalizing a decision

- Who will be impacted by this decision?
- Who else needs to be involved in making this decision?
- Is the decision in the best interest of all the parties involved?
- What perception will this decision leave?
- What reputation will this start?

After the decision has been made, act on these questions ...

- Who else needs to know this decision?
- What is the best timing for informing them about the decision?
- What is the best way to communicate this information to ensure that all affected individuals receive notification of the decision?



If you are frustrated by a situation, ask yourself...

What can I do to improve the situation?



Module 5 Ruby's Tips for Promoting Positive Internal Customer Service

Set others up for success by sharing accurate, timely and complete information.

Communication

Return voice mails and e-mails within 24 hours.



Choose your communication method for the best impact.

Make a conscious choice between e-mail, phone call, voice mail or a face-to-face meeting.

Perspective

Where's Your Focus?

Don't Have
Don't Want



Do Have
Do Want

Your attitude is the key to your future!

