



Customer Service Training For Managers & Supervisors

What Every Manager Needs To Know To
Create A World-Class Customer Environment



The Customer Service Training Institute

<http://www.infowhse.com>

Introduction

Customer Service Training is very important training for everyone in a company. The way we interact with our customers might very well be the difference between a company thriving and growing or a company that continually struggles to maintain the status quo.

There are those who still believe that the only people who require this type of training are the salespeople who interact with the customer and guide them through making their decisions. This is a very narrow minded approach that is full of “holes” and lacks any logical basis.

Think about what the entire customer experience consists of. It begins when the customer first walks through the door, calls on the phone, or clicks on the website. This is when the customer is first introduced to your business and first impressions are made. Who is involved with the customer at this point? Could it be a receptionist, stock clerk, cashier, delivery person who happens to be in the parking lot or selling floor?

Who is responsible for the other parts of the process? These people may include cashiers, accounting people, warehouse personnel, delivery people, etc. then we have after sale support, service technicians, customer service people, the list goes on and on.

All of these people play a role in the customer experience. Any one of these people has the ability to enhance, or ruin, the customer experience. Any one of these people can help create a happy customer who will be an ambassador for your business, or create an unhappy person who will bash your business whenever he has the opportunity.

For example, let's look at a few examples and you decide if there is any real difference in the customer experience:

- 1) A customer purchases a product but it is delivered in poor condition and 3 hours late.
- 2) A customer purchases a product based on your sales person's recommendation only to find out it does not suit his needs.
- 3) A customer waits to pay for their purchase on a line where a cashier is busy talking to a friend or co-worker and not ringing up sales.
- 4) A customer purchases a product and the billing department makes a mistake and charges higher interest and the wrong term for repayment.
- 5) A customer has a problem with a product but the service department does not respond or call them back.

The result of each of these examples is an unhappy customer. It really does not make that much difference "why" the customer is unhappy, the main point is that he IS unhappy. (Yes, it is good to know why so you can address the problem but you want to eliminate these issues BEFORE they occur!)

As a part of the Management team, managers and supervisors have a different and expanded role when it comes to customer service and customer service training. It is the purpose of this publication to explore this role, open your eyes to the role you play in the process, and give you the tools and the insights you need to perform at your highest level.

The Management Role In Customer Service

In this chapter, we will discuss the various responsibilities of management as they pertain to the Customer Service experience. We will cover these roles in no particular order, as they are all equally important when it comes to creating, and maintaining, a world-class customer experience.

Seeing The “Big Picture”

As a manager or supervisor, your everyday responsibilities allow you to see things at a higher level. Just like a coach in football, or a manager in baseball, you can see the entire operation (or at least your part) whereas individuals tend to see only their small part.

This is important because YOU can see how some things will affect several aspects of the customer service process. What might seem to be a good idea at one level might prove unacceptable at another. You cannot expect one person to know how one change might effect another department or part of the process. You, however, with the knowledge of how things work in both areas, should be better equipped to make a decision.

For example, let’s say there are a lot of forms to fill out to make a purchase and arrange delivery. Someone at the cashier’s station thinks it would be a great idea to combine 3 of the forms into one because they all have pretty much the same information. Sounds like a good idea, right?

In reality, though, it could prove to be a real nightmare. Each of those forms goes to a different area after the sale is made. One goes to delivery so they are aware of what needs to be delivered. Another goes to inventory control so that inventory is replenished. The third goes to accounting so the customer can be billed for their purchase.

If all these forms are combined into one, we run the risk of nothing being delivered, inventory running out because nothing was replenished, or customers not being billed for their purchases! Each one of these will affect not only the profitability of the business, but the customer experience as well.

The same can be said for ensuring that the customer experience is being addressed throughout the entire process. It is easy for someone removed from the individual processes to see where any shortcomings might exist. It is also difficult for some people to admit to themselves that they are part of the problem or that they need better or “fresher” skills. A manager or supervisor is in a far better position to independently evaluate their staff and processes to see where problems are and how to best address and resolve them.

It is also important for someone to manage the customer service experience from a financial perspective as well. In order to remain stable, profitable, and poised for growth, a business must use fiscal responsibility when making decisions. This is usually entrusted to the manager or supervisor as part of their responsibilities.

The customer experience is important and steps must be taken to ensure that this experience is the very best it can be while staying within appropriate guidelines. Sure, it would be great if we always had enough sales people and cashiers so no one ever had to wait for help or to pay for something. Yes, it would be great to be able to have enough delivery trucks and drivers so that a

truck could follow the customer home and have their purchase delivered immediately.

That would all be great, and the customers would love it, but it is likely the business would go out of business in short order! The costs to provide such a high level of service would be prohibitive! What needs to be done is to have a balance between costs and service. We need to find the optimum staffing levels so that wait times are minimal for assistance and expenses are within reason to insure profitability.

Management makes those decisions and those decisions affect the level of service we provide our customers. The key to making these decisions is to “see the big picture” and how these decisions affect the customer experience.

That means listening to employee and customer comments. It means getting “out there in the trenches” and experiencing first hand what our customers see and feel each and every day. Some call it “measuring the pulse” of our customers. I like to call it “keeping in touch” with our customers.

All too often changes are made with little or no knowledge (or care for that matter) of how the changes will affect the customer? Will the impact be significant or barely noticeable? How will these changes affect our employees currently involved in that area? What do they feel about the changes?

It is up to the manager or supervisor to provide that input and to possess that knowledge. Often times we have people who work harder than they should just to keep things operating as best as they can. They may be overworked and stressed almost to the breaking point. It is only through asking questions and monitoring operations that this information can be made part of the process.

A very important part of the manager or supervisor role is to make sure that the **entire process** remains customer focused. It is not enough to make sure that each person is customer focused, they must work together with others in their area and remote areas, to insure a customer friendly experience.

Seeing the big picture is critical to providing the very best customer experience to your customers. Being able to understand how different areas of the company interact with yours is a very important part of your role in the customer experience. You will need to balance the needs of the company against the needs of the customer to come up with a solution that is fair and balanced for all parties.

It is also important to understand that both the needs of the company **and** the customer need to be addressed with any resolution or decision. It is a two-part formula for success. Addressing the needs of the customer increases the likelihood that they will come back again and again for their future purchases. Addressing the needs of the company helps insure that the company will stay in business and be there to support and serve their customers in the future.

If we make decisions that fail to address one party's needs, then we run the risk of losing our customers or having the company go out of business. It is important to remember that a company without customers cannot exist and a company that is no longer there cannot support its customers, either.

Leader

A good manager or supervisor embraces the role of being a leader. It is no longer good enough to be a manager or figurehead, it is important to become a good leader.

There are scores of books, seminars, courses, and materials on how to be a good leader. There are many approaches to becoming a leader and we will not go into those specifics here. What we will concentrate on is the importance of being a leader in your department or company as it relates to the customer experience.

Leaders are people who take charge and “lead the way”. A good leader makes his team part of the process and leads by example. While he may “dictate” at some times as required, he is also readily willing to listen to those around him and make them part of the decision making process.

A good leader also realizes the importance of explaining to those on his team the need for doing something or for changing something everyone has become used to in the past. It is not good enough to just tell someone to do something, a good leader will take the time to explain why this task or action must take place.

It has been well documented that people more readily embrace something new when they understand the reasoning behind it. When people see and understand the need for doing something, they will be more likely to do it and do it well. It is when things are perceived to be “busy work” or “not worthwhile” that people balk at doing something new.

When it comes to customer service, it is important that your team understands “why” the things they do impact their customers in certain ways. It has been our experience that most people who treat customers in a less than stellar manner often do so without realizing it. Therefore, people need to understand why people react in certain ways.

For example, let’s say you have a cashier talking to friends while people are waiting. This is obviously not right and you could just say “Stop talking to your friends during working hours!” and that would be justified. However, a good leader would see this as a potential training opportunity and handle it differently. A good leader might handle it something like this:

“Donna, I noticed this morning that you were talking with your friends while there were customers waiting. You also talk with them while you are waiting on the same customers. I want you to understand that customers don’t like that because it makes them feel neglected and not appreciated. I’m sure it was not your intention to make them feel that way, but that is how they feel and we need to respect that.”

Some people might say this is treating people with “kid gloves” and it is common sense not to talk to friends while customers are waiting. Well, that’s correct but isn’t it better to handle these things as opportunities to train and lead rather than dictate? Which approach do you think will have the greatest chance for success?

I tell managers and supervisors that they should not be concerned about being right or wrong. What they should concern themselves with is being long term “results oriented”.

By that I mean that how the act, and react, with their team should be measured by the results that are achieved over the long term. If your customer satisfaction improves steadily and your team performance increases as well, then your methods are proven to be effective.

A leader makes sure that his team is aware they are part of a team and that they all need to work together. A leader makes sure that each team member knows they are free to offer their opinions and comments in order to make things better. When team members realize this and believe it, they are vastly more receptive to changes and improvements. They are all far more likely to work together as well.

A good leader also knows that there will be times when tough decisions must be made even though they may not be popular or even understood. When this occurs, it is important for the manager or supervisor to have the respect of those under him. This is important because when things are not understood or agreed upon, it is important that team members embrace something because their leader tells them to. When a leader is respected by others, he is more likely to be followed in these situations.

So, you may be asking, how does a leader gain the respect of those under him? A good leader realizes that he must be fair with those in his group. He must treat them appropriately and he must make them feel appreciated and valued. This approach might be somewhat foreign to some managers, however!

During the course of my working life, I have worked for a variety of managers and supervisors. I worked for the “tyrant” who managed through fear and intimidation and I have worked for those who tried to manage through friendship. Neither of these tactics is effective today.

Leading through fear is a recipe for disaster. Those who use fear and intimidation often experience a very high turnover rate among his team. This is because the fear and intimidation form a hostile environment and people will leave as soon as something else comes along. Another result of fear is that many people will “shut down” or just stop doing what they are supposed to because they feel that nothing they do would ever be good enough. In almost every situation where I worked for people like this, people did much less in their jobs simply because they were not motivated to do any more.

Trying to be someone’s friend does not work well either. When a manager tries this approach, they are most always taken advantage of and do not get the most out of their teammates.

So what is the best approach? The best approach is to treat people well and with respect while keeping the manager / employee relationship intact. Become known as someone who is fair and compassionate but also fully dedicated to improving performance for the company. Remember, you want to be respected by those under you and also by your bosses as well!

Perhaps the most important aspect of you role as a leader is for you to set the example on what you want to see from others. If you wish to see customers treated in a certain way, YOU must treat customers in that same way when you deal with them. If you would like to see your employees dress in a certain way YOU must also hold yourself to the same or higher standard. You cannot expect people to not wear jeans to work if you wear them yourself every day.

A good rule of thumb is to expect more of yourself than you do of those under you. Become an example for whatever you wish to achieve. Be the one people look to for guidance. Be the person people use as an example of how things should be done.

Customer Service Training For Managers & Supervisors

Most people crave guidance and help. They are always on the lookout for ways to improve and someone to show them the right way. For those who wish to improve themselves and prepare for a better job, be the person who takes an active role in training and providing the information they need to succeed.

Be the person in charge of the department that everyone wants to work in. Be the person who develops those on the team and prepares them to do the very best they can, Most of all,

Be a leader.

Providing Vision

Have you ever decided to go on vacation, packed your clothes, loaded the car, and got on the highway and THEN decided where you were going? While I can't be 10% sure, most people don't think that way.

Would you start a new business, hire people; purchase a building, register the business and THEN figure out what you were going to sell? I would say this would be almost 100% NO!

Well, the point I am trying to make here is that people perform better and accomplish more when they know what they are doing, why they are doing it, and what the objectives are for doing it in the first place.

As a manager, it is up to you to provide a vision to your employees of where the company is looking to go and what your view of the future is. You also need to let your staff know your vision of how you are going to get there.

Most important, you need to share your vision of the employee's roles in achieving these goals.

At the "top" it is the owner or CEO who must communicate to the employees their views of where the company is going and how it intends to get there. It is important for all employees to understand their roles and their parts in the process.

At your level, it is not important just for you to support the company vision for the future, but you need to contribute YOUR vision on how you want your department to function. How is the department to be structured. Who will do what tasks? What will the procedures be? How are employees supposed to interact

with customer? All these things need to be brought out in the open so people know what is expected of them.

As far as customer service is concerned, it is important for the manager to have his or her own vision on how a customer should be treated. Should they be greeted when they walk in? Should we approach customers or let them come to us? How should we address them? What should our attire be? All of these things impact the customer experience and it is up to the manager to set those expectations up in the beginning so everyone behaves in a uniform way.

If you go into a McDonalds in Florida and order a Quarter Pounder with cheese, it is going to look and taste almost the same as the one you had last week in Washington and the week before in Texas. That is because everything is done in a uniform fashion. Expectations are set and procedures created to create a uniform experience.

People cannot be expected to support something or act in a certain way if things are not spelled out clearly. If you tell someone just to do a task, there might be 500 different ways to accomplish that task. If you ask 5 people to accomplish the same task, it might be handled 5 different ways. This is because your vision of what should be done and how it should be done was not communicated effectively.

Here's a perfect example:

You tell your employees to greet the customer when they walk into the store. You do not give any specifics other than everyone should be greeted. Here are some of the greetings you could get:

“Welcome to Federated, sir. Can I help you with anything?”

“Welcome. If you need anything, just ask”

“Hello, can I help you?”

“Yo, mama, wassup?”

“Hey, dude, you need anything, me and my homies be chillin over here.”

Hey, these are all greetings in one form of another. Some are more appropriate than others. The rule of thumb is if you want a certain result, you have to be specific and clear enough so that everyone knows exactly what you are looking for. If you don't take the time to do that, you will not create a controlled and uniform experience for your customers.

Vision also gives a look into the future and allows people to dream about their role in this company. If the future holds opportunities for people, that should be communicated so people can prepare for those opportunities NOW! Sharing a vision creates excitement and a positive expectation for the company and your place within it. It can also create a more stable feeling, especially if your company or industry has fallen on hard times.

The key to providing a vision of the company also addresses the fear of the unknown. Employees might see things happening and misinterpret them or just not understand. They may or may not be aware of things happening behind closed doors to protect the company or provide growth, If these things are shared with people, they will feel more secure and will put more effort into their jobs and their performance.

Share your views of the future with your staff and urge them to share theirs with you as well. Many a good idea has come from a dream or a concept. Share those with one another and you will see the benefits in very short order.

Team Builder & Leader

When it comes to Customer Service, we have talked about the need for EVERYONE to become involved in the process. Because the customer experience involves so many different people, departments, and resources, it is critical that everyone work as one to insure the best experience possible for the customer.

We talked about how a failure anywhere in the process can ruin a customer experience. Because of that, and because what one person does affects the entire process, we need to learn how to function not as a group of dedicated people, but as a **team**.

First of all, let me say that I strongly feel that the term “team concept” has been so overused that sometimes the original objectives have been lost. Every business now operates with “team members” instead of employees. However, just calling people team members does not make them a team. We need to get past the name and start practicing the fundamentals behind the concept.

The manager or supervisor needs to instill in his people a desire to provide the very best to the customer. That means using the best resources for any given task or process. People must also be groomed to realize that one person cannot be expected to have the best skill for every single task. While others may excel in one or two areas, there will be others who will excel in other areas. The task of the Team Leader is to identify the skills available and get the group to work together and utilize each person’s strong points.

The manager or supervisor has a two-fold responsibility with the team. The first area of responsibility is to provide the team with resources and guidance. The second area of responsibility is to provide the team with the

correct members in order to fulfill the team's objectives. We will cover that area first.

A successful team has a diverse membership. What this means is that a good team has members with a wide variety of skills, experiences, and backgrounds. I am not talking about ethnic diversity, although in some cases that is important as well. What I am talking about is finding people who have experience in all the areas and situations that a team is likely to encounter. Plus, and this can be huge, the members of the same must be able to work together both individually and as a unit. This is sometimes easier said than done.

Being customer focused means seeing things from a customer's point of view. This also means being able to think "outside the box" (another over used term!) and try and place yourself in the customers place instead of your own. In order to do this, a good team will put aside personal weakness and pride and be honest when addressing issues. This requires a certain type of individual.

If you have the ability to pick members for your team that will give you a great head start in building the kind of team that you want. More often than not, however, you will "inherit" team members.

As a team leader or team builder (they may or may not be the same thing), you are responsible for getting the team to work as a group rather than individuals. You must also get the group thinking as a group instead of individuals. This may cause a problem with some people.

Some people are hesitant to let the group get the praise and credit for a job well done. Some people, looking to get a promotion or a raise, may wish to rely on personal credit to advance their own cause and will not work well within a team. When this happens, the team as a whole suffers. There is a way for the leader or manager to minimize this situation.

It sometimes helps to let people know they will be expected to work as a team but that you will also be monitoring individual efforts as far as personal growth, compensation, and promotions are concerned. Stress that the ability to work well within a team carries the most “weight” in personal growth within the company. From this individuals can understand that it is to their advantage to work well within the team. If they feel their efforts will be identified and properly credited to them individually, you will stand a greater chance of success.

A good manager or supervisor understands that everyone has personal as well as group reasons for doing things. A good manager also understands that fear of the unknown often hinders anything new. By addressing these fears one by one, you can minimize their impact.

When it comes to either bringing in new members, or building a team from scratch, it makes sense to bring in people you feel will work well with the others. Look for personalities that will readily adapt to the group. Look for people who will compliment existing members both with skills and personality. Try and find out what the team lacks and what it has in abundance and bring in new members accordingly.

For example, if you have a 10-member team to build and you already have 5 accountants on it, do not bring in a new member who is also an accountant. Try and identify other required skills and find people with those skills. Every team has analytical people to look at and interpret statistics, someone who is good at presentations or communicating, and people with other specific required skills that vary with the team purpose.

The key is to find a group of people who will work well with each other and possess all the skills to fulfill the goals of the team. To achieve this, we must take care when we assemble the team, replace members who leave, or bring in new members.

A team cannot function without resources. The manager or supervisor in charge of the team is the person who can most readily supply those resources or fight to get them allocated.

One very common problem with a lot of companies is that there is a “disconnect” between management and employees. When this happens, unrealistic expectations can be created which, if left un-addressed, will result in the failure of the team.

One example of this would be to assign a group of people together as a team and assign them responsibilities without giving them the time to meet and plan. There may be an assumption that this group of people already has extra time available to them but this might be an inaccurate assumption.

The manager or team leader must be given the resources to enable the team to be successful. This would mean time for the team to meet, training as required to learn how to work together and to understand the topics that they have had assigned to them, and any physical resources necessary to carry out the tasks.

Let's use this example:

John, the front-end manager of a local electronics sales / distributor has been tasked with putting together a team of employees to redesign some of the customer service procedures and processes to make them more customer friendly. Since there are six different departments involved, John gets to pick two people from each department to join this team. (Why two people? Answer a little later....)

Since John is in charge, he would first figure out how often the team will need to meet, the space required, and what resources (computers, paper, board,

markers, folder, etc) they will initially need. He should also inform upper management if there would be any other known or likely expenses (training, etc.) that will be needed later on after the initial meetings. It is good to do this now in case management determines that there are not enough resources available to properly support the team.

If everything goes forward, John now needs to pick his team members. Hopefully he has a good idea about the skills and talents required for the team to be successful. He can now start to pick members from each department. If he knows the people it makes the jobs easier. If not, he should try and contact other managers to get some details. We want people who are likely to work well in a team environment and who are positive in nature. We do NOT want chronic complainers, fault-finders, or anyone who will “poison” the attitude of the team.

John will now pick two members from each department. Why two? Well we want to be able to look at things from different perspectives. So, having two people with expertise in one area will give us more viewpoints and more options and ideas than just one.

Now John has his team built, the resources allocated, and he is ready to move forward. He knows that he must treat his team well and encourage the free exchange of ideas. He knows he is the one who has to guide the team and keep it on track. Now comes the next part of the management role. Maintaining focus.

Note: In some cases, a team might put formed unofficially. Just because a team is not built or requested by upper management does not mean that people cannot work together to achieve a common goals. As a manager or supervisor, you may feel the need or desire to have a group of your employees work

together informally to go over problem areas or concerns and recommend changes. Running and guiding this type of team is no different than a formally recognized team.

You still need to address issues, keep the team focused, and take steps to address the fears and reservations of certain members of the team.

Maintaining Focus

The manager or leader is responsible for presenting people with their goals and keeping them focused on those goals. Without such guidance and encouragement, people will tend to either stop their efforts or revert back to their “old ways”.

The fact is, some people are easily distracted. If they are not kept focused or reminded of what needs to be done, they will just not accomplish what it is they were assigned. Therefore, it is crucial that, as a leader, you provide clear-cut objectives, with established deadlines, to keep people focused.

Communication is key when it comes to keeping people focused. Explaining why something needs to be done or learned is critical is getting people to “buy in” to what you are asking.

Another way to keep people focused is to provide actual deadlines in which to accomplish something. With training, for example, you just do not say, “take a course in Customer Service” to a person. Stated this way, the person could take a course next week or 6 years from now and that would fulfill their obligation! You are much better off stating “You should take a course in customer Service and have that course completed by Thursday the 29th of this month”. This way both you and the other person have a clear understanding of what is required.

Another reason for deadlines is often times you will require the same thing be done by more than one person. Without deadline, you would have no idea

when you could move on with the next step. Person one might complete their task today while person two won't do theirs until next month and person three, a known procrastinator, is waiting for the next Presidential election to complete his task!

Frequent "status updates" are another way to keep people focused and on task. Holding a short meeting at the end or beginning of every week is a great way to discuss situations that came up since the last meeting. With Customer Service Training, this is a great way of discussing customer problems that were encountered and what was done to resolve them. These meetings are also a great way to discuss WHY the problem occurred in the first place and how to make sure it doesn't happen again.

When it comes to Customer Service, remaining focused is important to insure that people continue their training and also continue to implement what they have learned. It is very easy to "backslide" and return to old habits if a person should lose focus. Customer Service is not a specific task or procedure, it is a **state of mind** that focuses on the customer and how they should be treated. It is not a "cookie cutter" procedure that works for everyone, every time. What great customer service requires is the right kind of mindset and the ability to focus on the needs of the customer.

A lot of companies state they are proud to be "customer focused". In reality, though, most of the time that means new displays, brighter and easier to navigate stores, and a few extra people on the phones or at the registers. While those things are great for the customer, that is NOT what it means to be customer focused.

A great manager understands that everyone on his team must be customer focused. That means having everyone aware of how each action, procedure, rule, or policy affects the customer. Being customer focused means

looking at something and thinking about how a customer would look at this and what changes would benefit the customer. It is a mindset that takes time to develop.

An effective manager encourages free-thinking and the expression of new ideas. When this happens, people see a reward in being focused on the customer. We want people to stop and say to themselves; “You know, if we did this, the customers would just love it!”

A good manager or supervisor encourages people to remain focused. Managers can do this by singling out an individual and letting them know they are doing a great job. Especially after a difficult task or situation. Can you imagine the reaction of an employee if you did the following:

Mary has just finished with an extremely difficult customer. She managed to resolve the situation and make the customer happy but it was an uphill battle all the way. Imagine how Mary might feel if you took two minutes and said to her: “Mary, I want you to know that you did a great job with Mr. Johnson. He was very difficult to deal with but you handled him perfectly. I hope others will see what you are doing and make the same effort when they have a difficult customer to deal with. Thanks, again, you did a great job!”

Do you think Mary would feel pretty good about now? Do you think she would be motivated to keep up her efforts and perhaps even reapply herself to further increase her skills?

People crave recognition and praise. Deserved praise motivates people and keeps them focused on their objectives. If you hold scheduled meetings on Customer Service, these are great places to recognize individual and team accomplishments. Make people feel that their efforts are appreciated. Don't overdo it but always be aware when someone does something worthy of a little

praise. The few minutes it takes can bring great returns for you and your company.

Another way to keep people focused and dedicated is to produce a weekly or monthly newsletter. In the newsletter you can talk about new things coming your way and introduce new techniques or training programs. You can also use the newsletter to recognize achievement (Mary just finished her second Customer Service Training module! Congrats, Mary!), remind people of upcoming deadlines, and to share information on what the company and everyone else is doing.

People remain focused much better when they feel they are part of a group or part of a team. Make every employee feel like part of the company. When people are not made to feel they are a valued part of something, their efforts tend to fall off after a period of time. Don't let that happen to your group. Make everyone feel valued and needed.

NOTE: If you have people in your company or group who are remote of "field" employees, these people are at much greater risk of feeling "disconnected" from the company. When you think about it, they do not have the benefit of interaction with other employees on a daily basis that in-house people have. So, without this interaction, some people may start to feel like an "island" instead of a valued part of the company.

When managing remote employees, newsletters, phone calls, frequent visits, etc. all make that person feel more of a part of the company. Make the effort to get these people involved in projects and meetings. The extra attention will give great rewards coming back to you.

Escalation Resource

No one is perfect and no one has all the answers. When it comes to Customer Service, the manager or supervisor plays an important role in the **escalation procedure**.

An Escalation Procedure is what we have when a person reaches a certain point with a customer where he or she can no longer make any progress with the customer. At this point, the individual will hand over or “escalate” the situation to another individual. We do this to provide an alternative to simply letting the customer walk away unhappy or to make another attempt to resolve a difficult situation.

The natural next step in the escalation procedure is a more “senior” person in the company. That is usually the manager or supervisor since that person usually has more authority within the company.

The idea behind an escalation procedure is that some situations may require special skills, knowledge, or authority that every employee or person may not have. When presented with these types of situations, we must have an alternative available so that the customer, and also the employee, has options available to help resolve the situation.

Here are a few examples of situations where an escalation procedure might come into play:

- 1) A customer comes in with a problem with a specific product. In order to resolve the problem, specific technical knowledge is required. In this case, the problem would be turned over, or escalated, to another person with that specific knowledge.
- 2) A customer has a specific request or demand, which an employee does not have the authority to authorize. In these cases the issue is escalated to a manager or person that has the authority to approve the request.
- 3) A customer is being extremely difficult to deal with and demands to speak to someone else. The customer is then escalated to the next level.
- 4) A customer has an issue that may have legal implications. In these cases, the customer is directed to a manager due to the sensitivity and potential of legal involvement.
- 5) A customer complaint is getting out of hand and the person involved does not seem to have the skill or ability to calm the customer down or resolve the situation.
- 6) A customer feels that his or her needs are not being met by the current individual or seeks confirmation of a superior person in the company.

These are the most common reasons issues are escalated although there are others that also require escalation. The bottom line is that we escalate any issue that cannot be handled adequately by the original person.

Some people feel that this is obvious and there is no need for an established procedure. When people need help, they just go to someone and ask for it. Simple, case closed, right?

That might be the case in an extremely small company but when you get to businesses with several employees or departments, it is critical that everyone act and follow the same procedures. We can't have 15 people handling the same issue 15 different ways. We also can't have 15 people going to 15 different people for help and approval. When this happens we have chaos! This is even more the case when we have businesses with multiple locations.

Creating a world-class customer experience requires that customer number 1 receive the same quality of treatment as customer 100. That means that EVERY customer with a certain problem has that problem addressed and resolved in a very similar fashion. To insure that this happens, we need to provide our employees with an escalation procedure that they can follow.

An established escalation procedure is the responsibility of management. It is not the responsibility of the individual employee. Employees are expected to follow the procedure, management is expected to create the procedure and make it available to all who will use it.

As a manager or supervisor, your responsibility here is two-fold. First, you should have a role in creating the policy and implementing it. Second, you are in charge of seeing that the policy is adhered to and that people are not doing whatever they want instead.

As a rule, people like an escalation procedure. It gives them the information they need to resolve tough situations and it provides them with a clear-cut answer of whom they should turn to when things get bad.

Sometimes, however, you will have people used to handling things their own way using "contacts" they have used in the past. When you have this occur, you need to reinforce the escalation procedure and urge them to follow it. This most

often occurs with long-time employees who have built up their own little “support system” that they are more comfortable using.

Like everything else that is new, you might encounter a little resistance when you first introduce your escalation procedure. This is to be expected, as no one likes change. However, we can minimize the resistance by explaining why the procedure is needed, what it is designed to accomplish, and most important, why this procedure will make employees lives easier! (People love things that make their lives easier so play up this point as much as you can without going overboard!)

When you introduce your escalation procedure, it must also be presented **in written form** so people will have it to use as a reference and so everyone will know who gets contacted for what reason. You **should not** introduce your escalation procedure by saying, “OK, if things get out of hand, go to me. If someone threatens legal, go to Sam, if you need approval, go to Marge. That’s it, let’s go out there and do a great job!”

Write it down and make it part of your notices on the bulletin board (if that is out of the customers sight area!). If you publish an employee manual, make it part of that manual as well. If you have a Human Resources department, then have it posted there as well. Explain it well and make sure your employees understand how to use.

An escalation procedure is one of you most powerful weapons and resources when it comes to difficult customer situations. Take the time to think things through as you design your procedure. Update it as the company grows or things change. Most of all, follow it.

Which brings us to the last management role in the escalation procedure: setting the proper example.

For the purpose of this discussion, I will assume that most of you reading this are not the final authority or last person of contact in the Escalation Procedure. Since this is the case, we must stress how important it is that **you** follow the procedure as well as expecting your employees to follow it!

If you routinely go “your own way” and fail to follow the procedure, you send the word to your employees that it is OK to do “your own thing” and abandon the policy. In business “Do what I say not what I do” does not often work. You cannot behave in one way and expect others not to follow suit.

Do yourself a favor and be a role model for your employees and team members. You developed the escalation procedure. You introduced it, and now, you should follow it. Show other how it should be done and you will soon find other following your lead and making everyone’s life just a little better!

Policy Maker

As part of the management team, the manager or supervisor is usually responsible, either totally or in part, with designing, implementing, and enforcing, the policies and procedures necessary to run an orderly and efficient business. It is the manager who is tasked with not only creating the policies, but also identifying the need for new policies or changes to existing ones.

We have discussed the manager's ability to see things from a distance or, as we put it, see "the big picture". This is something that those involved directly in the day-to-day action cannot often see. As the manager, you see how things integrate and affect each part of the business. With this knowledge, you can readily identify what needs to be done to correct a problem or enhance the customer experience.

Let's take a moment to talk about making changes and creating policies. In order to make good decisions, one needs information. By information we mean cold, hard data, not assumptions or perceptions. We have all heard the phrase "If it ain't broke, don't fix it!" There is a lot of truth to that statement and we really need to address this before we proceed.

A lot of good faith decisions lead to making things a lot worse, not better. Many people make decisions based not on accurate information, but on false information or assumptions. This can lead into wasted time, effort, resources, and a poor customer experience.

A common example is someone who visits a department a few times a year. That person happens to come in on a few times where things were a little slow.

90% of the time people have work stacked up waiting to be done but there are a couple of times every month when things slow down. Accounting is sometimes like that. You may have a “lull” at midday before records and receipts from the morning come in.

Now this person comes in 3 times and sees people talking, reading, whatever they are doing to pass the time, knowing things will be picking up real quick. But the person observes this and falsely thinks this department is over staffed. If a decision were made to reduce the head count in that office, it would be a wrong decision. A decision made in good faith, perhaps, but still a wrong decision.

Suppose a customer tells you he “always has to wait at least 30 minutes to check out every time he comes in” and you take those comments at face value. Maybe someone else said the same thing to you earlier. Do you make a decision to add more cashiers based on this information or do you step back and do some “fact finding” to make sure the information is correct?

The problem with comments from people is that they are often overblown and exaggerated. Some comments come from frustration and others just from a bad perception. In these cases, the customer feels they are accurate but they really aren't. So, what should a manager do in these situations?

The first step is to ask for information from others in that area. In the first example, if the person who visited the department has stopped to ask the manager there what was going on, he would have found out that sometimes there is an hour or so “lull” every week and then things start picking up. The manager could have told him that they schedule lunch hours around that time or scatter shifts but the head count is really correct. Having this information may change the decision. Real information versus a wrong perception.

I am a big fan of hard data. This is a perfect Customer Service example:

Customer Service is not an easy job. Depending on your actual function, you can face a lot of angry or mean customers during an average day. In one of my past jobs, I was confronted by a person who wanted to quit. I was disturbed at this because she was an excellent person who was very good at her job. I asked her why she wanted to leave.

She told me that “80% of the people I deal with are mean and angry and I really hate that. It’s just too much.” I told her I didn’t think the number was that high and I asked her to start making a count of the number of people she dealt with each day for the next week. Out of that, she would count the nice people and the angry people. I told her we would chat at the end of the week.

Well, she came to me and we found out that the percentage of angry customers was about 10% not the 80% she had thought. The problem is that we don’t remember the nice people because they don’t make much of an impression. But, boy, do we remember the ones who gave us a hard time! Those are the ones who really stick out. I told the woman to do the count for another two week and we would have a real accurate figure by then.

It turned out the 10% was pretty accurate and she had a new outlook and perspective on things from that point on. My point is that the real hard data gave us something factual to make our decisions with. Though data can be misinterpreted at times, it usually has a certain degree of factuality that we can use in our decision-making process. The more data we have, the more informed we will be and the more likely we will be able to make the right decision.

Making the right decision is important because, although decisions can often be reversed, people do not like change. If you change something today and then change it back tomorrow, people get discouraged and also question your decision-making abilities in the process.

Now that we have addressed the need to make informed decisions based on factual data and not first impressions or perceptions, let's talk about policies in general.

First of all, when it comes to customer Service, let's have one thing clearly understood. Customers do not care about your policies if they stand between what they feel they are entitled to. Just because you state there is a policy against doing something does not make it right in the eyes of the customer. Whether that is right or wrong, it is a concept that must be understood before we move forward. Never create a policy solely to restrict a customer's rights or options. That is not being customer focused.

Looking at policies from a Customer Service viewpoint, policies must address a legitimate need and have a valid purpose behind them. For example, you should not create a policy that states there will be absolutely no refunds under any circumstances unless there is a good reason for doing so. Policies are just that, policies. They do not absolve you from your legal obligations under the law.

What policies enable you to do is set a uniform guideline as to how a certain situation is to be handled and what resolutions are acceptable in the eyes of the company. Policies set the parameters against which all actions and potential resolutions are judged. If an employee had a resolution that is within policy guidelines, then it can be presented to the customer. If a customer's demands are outside of those policy guidelines then the request is refused or the situation escalated to someone that is empowered to go against policy.

As a manager, you should be aware of the reasons behind the policies and what the policy is intended to address. This is important because your employees may ask why something is the way it is and you should be able to let them know so they will understand and buy into the policy like everyone else.

Again, people respond better when they know and understand the reasons behind something.

A good manager always looks for policies that are outdated or no longer useful. Things change over time and sometimes the original reason for a policy may no longer exist. In these cases, sometimes policies are eliminated.

For example, let's say you have a policy that states that every refund form be filled out in triplicate. That's a lot of work and at one time, copies were needed in three different departments. That was the reason behind the policy. Now, however, your company is computer driven and everyone has moved away from paper and now looks at things via computer.

Now one form is needed and that form is entered into the computer. From that point on, everyone looks at the form on his or her monitor. So, three forms are no longer required. Since one form is all that is needed now, the policy can be abandoned and the extra work eliminated.

A manager should continually be aware of what is happening in their departments. They should constantly be evaluating current policies and also consider what new policies should be in the future. As technology and people change, so must the policies.

For example, 30 years ago there was no need for a policy banning the use of cell phones during business hours. Today, that might be a required policy because of abuse in the recent past. Circumstances dictate policies and policies are subject to the test of time and relevancy.

A good manager also realizes that too many policies is not a good idea either. If we have too many policies and rules, our behavior becomes so automated and restricted that free-thinking and the exchange of ideas becomes inhibited. Try

and find a balance between that addresses the issues without over burdening the employees. Try and be fair without being too restrictive.

Often times it is how new policies are presented to the employees that determines how effective they will be. As with everything new, it is critical that the policy is explained along with the reasons behind it, the issue the policy is intended to address, and why the policy was created like it was. Again, when people understand something and see the value behind it, they are more likely to embrace it.

One key thing to avoid is change for the sake of change. Do not continually change policies or create new policies to replace just released “new” policies. Do not rush in creating a policy unless the need is extremely urgent and requires fast implementation.

Policies should always be viewed as “aids” to employees that assist them in performing their job. Policies also help everyone treat customers in similar ways so that what we do for one customer today is very similar to what we do for his neighbor tomorrow.

As a manager, you are the one employees look to for help and guidance. You’re the one who can take employee suggestions, complaints, and issues and implement policies to help resolve these issues and make your employees work day a little easier.

Just make sure as you do this that your policies are as customer friendly as possible and that the policies address a legitimate need or problem that has been correctly identified.

When it comes to Customer Service, try looking at your policies from a customer point of view. Ask yourself, “How will a customer look at this policy?”

“Will they think it is fair?” “Does this new policy make things easier or harder for the customer?” Most important “Will the customer look at this policy as a positive or a negative?”

By looking at policies from a customer point of view, it is sometimes easy to find ways to modify the policy so it is more customer-friendly while still addressing the need of the company. As we have stated before, being customer focused is more than just making products easier to find and easier to buy.

So, the next time you look to create a policy, try and do the following:

Do your homework first before making changes.

Make informed decisions based on facts, not perception. Make sure this is a valid issue.

Ask for input. Confirm your suspicions.

When you create your policy, step back and look at it through the eyes of the customer. Look for ways to make it as customer friendly as you can while still addressing the issues.

Make reasonably sure the policy is in as close to it's final form as possible before you release it. Do not rush an incomplete policy unless the problem is of critical nature.

When you present the new policy to your employees, make sure you explain it and give the reasons behind it. Sell it to your employees and give the benefits of it so they will more likely embrace it and support it.

Advocate

Everyone needs to feel part of the team or company. They need to feel that their voice is heard and their comments, problems, and needs are recognized. When someone feels they have no voice or input in the way things are done, they usually become disillusioned and their performance decreases.

The problem is that, unless the company is very small, everyone does not, and cannot, have direct access to every level of management. That is just not possible. If everyone could walk into the CEO or owners office with every comment, idea, and issue, nothing would ever get done.

Managers and supervisors are usually the first line of defense when it comes to interacting with employees. Managers and supervisors are the ones people go to with their comments, problems, and ideas. Because of this, it is important that your employees feel that you “have their back” when it comes to fighting for them.

In other words, you need to become their **advocate**.

An advocate is someone who speaks for those who do not have a voice. For example, a Public Advocate is someone who represents the people of the community or city with the government. They take the issues of the people and bring them in front of government so that they may become aware. IN other words, an advocate fights for their people.

Managers and supervisors need to become advocates as well. As we stated already, individual employees do not usually have the ear of those in

upper management. I mean no disrespect with this statement but it is a fact that upper management often do not know what goes on in many departments of a company.

For example, the President or CEO usually has no idea of the process flow in the warehouse. They only care that the process works. They leave the details to the people who run that department. That would be the managers, supervisors and other people in upper management. The CEO is responsible for the company as a whole and cannot possibly be involved in every day-to-day decision. If that were the case, nothing would ever get done because everyone would be bothering one individual with every little question

In most companies, there is a “chain of command” much like the escalation procedure in Customer Service. This chain of command means that employees go to their supervisor with their comments, needs, and issues. The manager goes to his boss, who goes to his boss, etc, until the person who is empowered to make the decision is reached. At that point, the decision is made and brought back to the employee or otherwise acted upon.

It is important to understand this because you, the manager or supervisor, are the first line of defense. If you do not act or fulfill your role as an advocate, the process grinds to a screeching halt and your employees have no voice.

It is up to you to act on the comments or needs of your staff. This does not mean that you have to grant every request or forward on every comment. What you do have to do, however, is acknowledge and address every request or comments made to you.

This is important for a couple of reasons. First, by acknowledging each request or comment, you are validating the feeling within the employee that

his or her voice is being heard. This is important as we said because it makes people feel part of the team and a valued part of the process. They also feel that they “have a say” in how things are done in the future.

Second, and perhaps just as important, is that everything changes. What worked yesterday might not work today. Technology and customer demands often dictate a new way of doing things. Policies need to be changed, new rules need to be made, and new processes designed and implemented.

Who creates these new rules, processes, and policies? We already stated that the CEO or owner usually has not direct in-depth knowledge of everything that goes on. We also stated before that those who “are in the trenches” day in and day out are the best resources for ideas and suggestions! Who do your employees bring those thoughts and suggestions to? YOU!

I have worked for a couple of managers who were really great. They listened to people and discussed the issue or comment with them. If the idea made sense, they would pass it on to their boss and give credit to the person who presented it to him. If it didn't make sense, they explained why but thanked them for the comment and encouraged the person to come back with any comments in the future. This little encouragement helped dull the feeling of rejection that might have been felt by the employee.

Then there were the managers who thought their employees were just there to do what they were told and had no value as far as ideas or suggestions were concerned. They did not act on any ideas or comments and were not responsive. If someone presented an idea that had merit, he would present it to his boss. If it was well received, he took the credit. If it were declined, someone else would get the blame.

Guess which manager had the highest employee retention and highest success rates? The managers who took the time to listen and give credit, that's who!

Let's say we have a man named Mike, working in the warehouse. Every day, he sees wrong product being shipped out because the labels are hard to read, or the location makes it hard to see properly. He comes to you with an idea to make the labels easier to read or a better placement. You listen to the idea and present it to your boss. The change is made and incorrect shipments go down 500%. All because one employee came to you with a suggestion and you listened.

Do you think the CEO or President knows the labels are hard to read? Do you think that is even on his top 100 list of important things on his plate? NO! He is busy guiding the company and making decisions as to what direction the company is going to head in the next few years! He doesn't care about labels. But Mike does, and Mike helped make things better.

It is all about giving people a voice, making sure they know they can be heard, and making them feel that their voice has value and meaning. I know some of you are tired of this "touchy-feely" approach, but remember; we are not looking for a win-lose situation here but a win-win where everyone comes out ahead. It is better to make people feel valued and needed and happier about their jobs. This increases employee satisfaction and retention which in turn makes your life a lot easier as well. The costs and inconvenience of having to train a new employee are high. If we can spend a few minutes making someone feel needed and valued, that just might make them stay and then everyone's a winner!

There is another aspect of being an advocate that is also extremely important. That is acting on employee related problems and issues. Often

people feel powerless when there is a problem at work. They feel like they are just one small cog in a big machine. They feel that no one cares and there is little they can do.

That is where you can make your presence known for them. When an employee comes to you with a problem, regardless of what it is, take the time to listen and understand what the problem is. Ask questions and try to see the big picture. What might seem trivial at first can be a major problem to someone else. Take the time to listen.

If it is something you can resolve, like a personality clash between two people in your department, then act on it yourself. If the problem requires the actions of someone above you, bring it to the right person and ask for their assistance. Let the employee know what you are doing and why. When the request is acted upon, let the employee know the outcome whether it was positive or not.

As we have said before, sometimes comments and request will not deserve your action. They might be things you quickly realize will not work or have already been considered. In these cases, explain it to the person and thank them for taking the time to bring it to your attention. Always make it a positive experience.

When it comes to Customer Service, a manager can be an advocate for their staff by supporting their actions not only in front of customers, but to management as well.

Sometimes we will have an irate customer who complains to management about an employee. As some people often do, they embellish the truth or even outright lie about what was done or what was said. Sometimes these false comments can lead to the discipline or termination of an employee!

When you are informed of these complaints, and know them to be false. Or when you just know that a person would never say or do that to a customer, you must be an advocate for your employee and “go to bat” for them to make sure management knows this is a good employee who is being falsely accused.

When issues or problems are brought to you by your staff, always be appreciative and responsive. Create a feeling within your staff that you are supportive of them and believe they are a valued part of the company. Make them feel that they have someone willing to speak for them or fight for them when they need it. This will come back to you ten fold in a happier and more valued staff with higher morale.

Be a manager and a mentor. The benefits can be huge!

Providing Stability

One of the key roles of a manager, which often goes unnoticed, is to provide stability in the workplace. By stability, we mean providing a work environment that is conducive to performing at a high level and encouraging of peak performance.

As a manager, you are the “go-between” or link between your employees and upper management. This does not mean, however, that you are a source for every piece of information or discussion made by management.

As we have mentioned before, people dislike change. Some of us actually hate or despise it. So, if a manager can provide a sense of stability in their workplace, their employees will respond favorably. So, how do we go about creating this feeling of stability? It is a lot easier than one might think!

This first thing a good manager will do is act and behave consistently. If you conduct yourself in the same manner day after day, then people will get an idea of what to expect and how you would like to them act as well.

One of the worst things you can do is act one way today, then completely different tomorrow, and yet even differently three days from now. When this happens, those people working along side of you become confused as to what you want on any given day.

Changes in moods can also raise suspicion that something else is going on and that might create worry or concern within your group. The first key to creating stability is for you to be a stable presence yourself.

The second thing you can do is attempt to isolate your team from the “nonsense” that goes on around them. This means not spreading rumors or relying information that is not confirmed, finalized, or meant for general release as yet. All that is accomplished when this activity occurs is that people worry for no reason and that affects performance.

In today’s economy, job security is not what it was 10, 20, or 30 years ago. There is much less loyalty both on the employers side and the employees side. Our world is much more bottom line oriented now with everyone taking care of themselves first and foremost.

If people work in an unstable work environment, with rumor after rumor, and lack of structure on a daily basis, there will tend to be a higher than normal turnover rate and that requires a constant number of new hires and new employee training. A more stable work environment is a much better solution.

Here are a few keys to product stability in the workplace:

- 1) Keep change to a minimum. When change is required, give plenty of notice and explain it well.
- 2) Be a stable presence yourself by reacting to the same situation in a predictable manner so employees know what to expect and learn how you want things done the next time. Do not change your focus from day to day.
- 3) Do not exchange information that is not meant for employee’s ears. Letting people know business is down and layoffs might be on the way will only make people anxious and some may look for other jobs because of the insecurity.

- 4) Monitor your work environment and address anything that threatens it. That might be rumors, angry employees, troublemakers, etc. Deal with these threats early before they take root and cause problems.

Providing Feedback

A good manager knows the importance of providing feedback to their employees. Without feedback, an individual may have no idea whether they are doing a good job, poor job, or just “treading water”.

There are many way in which to give feedback. The most formal method is by way of a “review” where one’s performance is critiqued as part of a compensation review. These usually occur once, maybe twice, a year. For the advancement of customer service skills, feedback needs to be given far more frequently.

The most effective method of providing feedback is during training exercises and after a real life situation where an individual deals with a customer in order to resolve a problem. Feedback right after the situation is far more effective because the experience is still fresh in the person’s mind and they can remember details of what they did, how they did it, and what the results were.

When feedback is given at a later time, some of the details might be lost or forgotten and the feedback may not prove as useful as it would have been if it occurred right after the situation. Sometimes this is not practical but if feedback is given as soon as possible, it will be more effective.

Unless the person is a chronic offender, negative feedback should always be given in a positive manner. Remember that we are not playing a win-lose game here. We are trying to get everyone to improve and feedback in one weapon in our arsenal let helps people improve. The idea is to get people to see what they did wrong, how they can correct the problem, and how to handle it differently next time.

No customer Service Training Program can cover every possible situation (though ours comes close.....). The idea is to learn the skills and then adapt each skill for the situation that arises. Experience is the factor that often separates the great customer service people from the rest of the pack. Not that they possess better skills, only that they have the experience to know which technique to apply, when to apply it, and how to proceed in that particular situation.

So, how do we use feedback to motivate people and get them to improve? Well, first we acknowledge that feedback is important. We also acknowledge that feedback needs to be timely. Lastly we agree that feedback should be delivered in a non-confrontational manner. (Unless the individual is a chronic offender)

Feedback should always be delivered positively for one very good reason. With a large number of people, negative things cause a shut down within the person. A LOT of people will just stop listening when they feel they are being yelled at, picked on, or criticized. Because of this, and because we know we are not looking for a win-lose situation, we put a positive spin on the feedback.

There are a few things a manager can do when presenting feedback:

- 1) Try and do it privately. A one on one arrangement works best so that no one gets embarrassed in front of another employee. This is especially true when anything negative is being discussed. However, even positive feedback can make someone uncomfortable in front of others. When ever possible, do it one on one.
- 2) Whenever someone does something wrong, provide feedback with a positive spin on it. An example would be: Mary, I was watching you with that last customer. You were doing an excellent job with him until he got

upset with our policies. From that point you should have tried to calm him down first instead of pushing on. Next time, try and calm a customer down when things get tense rather than continuing to push a resolution. Otherwise, I think you were doing a fine job up to that point.” By giving some positive reinforcement to the individual, you make it easier for them to accept the criticism. No one likes to feel “beat up” so including some positive statements protects against that happening.

- 3) Positive feedback should be given when you notice someone really trying hard but having limited success. A little encouragement goes a long way towards keeping a person motivated. It is likely that the individual is also feeling a little discouraged and is also disappointed with their performance. By providing positive encouragement, you keep the person motivated and it is far less likely they will stop trying.
- 4) In group settings, recognizing a few people for work well done goes a long way towards rewarding those who excel but it also motivates those people who possibly can do better. Who wouldn't want to be praised in front of their co-workers? Who wouldn't want to be mentioned at a meeting or in the company newsletter? Another benefit of doing this is being able to explain what the person did and how they did it so others can learn from their experience. If someone did tame that “customer from Hell” then why not share how it was done? Industry specific examples like that teach people how to apply what they have learned.
- 5) Make an effort to give feedback often. It doesn't have to be elaborate feedback. A little encouragement or guidance every so often is both appreciated and effective in keeping people focused on what they should be doing. If no feedback is given, a person might backslide or even feel something is no longer important and can be forgotten about.

Mentor

Like it or not, as a manager or supervisor, your employees will look up to you for guidance and coaching. In other words, they look at you as being their mentor.

A mentor is someone who coaches others by sharing their life experiences and talents. In the work environment, a mentor could be someone in authority or someone who has worked his or her way up the ranks and is respected for doing so. Whatever the reason, it is important that you make the effort to live up to the responsibilities of being a mentor.

Being a mentor is something that many managers do without thinking. Providing training and guidance to another employee is being a mentor. The only additional aspect is taking a personal interest in someone who needs it.

Those who report to you will look up to you for your knowledge and experience. This is especially true when that person is looking to better themselves by preparing for a new or better job. As a manager, it is your duty to help that person with their efforts to better themselves.

When it comes to Customer Service and skills training, being a mentor means sharing with other what you would do in a certain situation. It means watching out and giving all your people the training they need to succeed. If you see a real need in a person for some training or counseling, it is your responsibility to provide that to the person.

People will not always ask for help. They might feel embarrassed or intimidated by you and “chicken out” in asking for help. You can counter these

feelings by making yourself accessible to everyone and by also making the first move when you think someone might need you for some help. You will often find people to be extremely willing and thankful for the offer of some help.

This also has benefits for you as a manager, too. You probably already know that there are two basic groups of employees. Ones who care about their jobs and look for ways to improve themselves and those who just show up, do their work, and don't really care about making themselves better. By getting to know these people and offering to help them with their goals, you will quickly find out which group each person falls into.

This knowledge is important because if you are going to build a strong team, or if you are looking for someone to promote to a better job, which group would you look for? Naturally you would look at the people who are looking to better themselves and look for any opportunity to do so. You likely have limited resources so it is important to pick the right person for the right job. The more you know about your employees, the better off everyone will be.

When it comes to Customer Service, you have a wealth of information and experience at your fingertips that cannot be read from any book. Your insight into how to handle difficult situations and difficult people can be of great benefit to others. Sharing your knowledge and helping others can be very rewarding. They're few things better than knowing that you helped another human being become a better person or better worker.

Another benefit for the manager in being a mentor is that your level of respect from your employees will go through the roof. People react strongly and loyally to people they see honestly trying to help others. This will benefit you greatly when you need your employees to support you or a policy you endorse.

Manager / Employee relations are a delicate balance if supporting the company and supporting the employees. Neither can survive without the other so it is critical that we take care of both. Sometimes there will be conflict and in those times you need to do what you feel is right. That might mean losing a valued employee to another job at another company because you taught him the skills. When this happens, take solace in the fact that you helped that person make himself better.

Far more often the result of your efforts are better-trained and more productive employees who are happier and more fulfilled in their jobs. There is little fault to find with any strategy that produces such profound results.

The Manager As A Trainer

When it comes to Customer Service, as a manager you are also a trainer. It is up to you to be an example as to how you want customers treated as well as a trainer in guiding people in the way you wish for them to act.

It is not good enough to send someone to a course and then “turn them loose” on your customers. Remember that one of our goals is to create a uniform customer experience. That means that regardless of who takes care of the customer, or which branch the customer visits, he will be handled the same way. This insures a better customer experience for your business.

If you were to ask 10 new employees how they would act or react to a specific situation, you would likely get many different responses. Each person thinks in different ways. We all react and think according to our experiences in life. One person will not always think like everyone else so it is important that we provide information and guidance to our employees.

It is up to the manager to “set the bar” for appropriate customer service. It is critical that every employee understands the importance of the customer and their value to your business. It is also important to explain the company philosophy and guidelines to new employees as well.

Just like people do not think the same way, managers (also people!) often have different ways of dealing with customers and have found specific methods to be more successful than others. Therefore, when an employee switches from one department to another, or when a manager is transferred or replaced, the employees should be informed on how they are to do their jobs and interact with customers.

It is also important for a manager to take the time to explain just how important a particular job is to the customer. Certain employees who work “behind the scenes” may not realize how what they do impacts the customer experience. By taking time to explain the value of the jobs people do and how they impact the customer, you bring awareness to everyone involved in the business. Awareness sets in motion a series of changes in the minds of your employees.

With awareness comes a different way of thinking. With a different way of thinking comes a change in attitude. Lastly, a change of attitude brings about a different level of performance. When the level of performance changes, so does the customer experience.

At this point it should be noted that these changes might be both positive changes and negative changes. A change in attitude that is negative will decrease the customer experience as much (or more) than a positive change will improve customer experiences.

We have discussed the role of feedback and how important it is to keep people motivated and with the right attitude. As a manager and trainer, feedback takes on an additional role. Feedback is used as encouragement to continue to learn and improve.

As your role of a trainer, it is your responsibility to teach your employees how to address different situations. You accomplish this by addressing each situation and outlining the steps you would like to see happen to resolve it. You then answer questions and let your employees bring that information to their jobs and utilize it when needed.

When you notice a person doing what he was taught and resolving issues properly then use feedback to acknowledge the effort and congratulate the person on their success. This validates the person's efforts and confirms the appreciation they feel.

A good manager / trainer will continually look for ways to point out situations and make suggestions, guide those in the department, and continually reinforce what was taught or learned.

It is important to realize that Customer Service Training is a two-part process. The first part being the learning of the concepts and techniques. The second part is the application of the knowledge in real-life situations. For most everyone, part one is easy. It is the application that presents the biggest challenges.

Customer Service requires knowledge and judgment. One without the other is a recipe for disaster. The people who excel at Customer Service are the ones who are able to evaluate a situation properly and determine which techniques or processes are the right ones for that particular situation. Experience is where people learn to pull everything together.

Since Customer Service is not a black and white process, it is important for the manager / trainer to teach and mentor not only the skills and techniques, but also effective ways to determine which technique is right for that situation. Since experience is the most effective way of gaining this information, the manager / trainer most often has the experience and can shorten the learning process by sharing it.

For example, if a manager has a lot of experience in dealing with difficult people, wouldn't it make sense for that manager to train those in his department on how he feels it should be done? Wouldn't it be a great idea for the manager to share how HE does it and how HE determines which techniques to use?

For example, a manager could hold a training session and share his experiences with others like this:

“You know, we seem to have a lot of problem customers who come in with outrageous demands. When I encounter one of these customers, I try to let him know that I understand the situation and offer him some things that we CAN do. I don’t dwell or discuss what we can’t do. Sometimes this gets the customers mind off their demands and on to what we can do to resolve the situation.”

“Last year we had a customer come in who no one could even calm down let alone satisfy. This customer was a real nightmare, threatening legal action, writing to newspapers, the whole nine yard. No one could help him. I got involved and took him into my office. The first thing I did was ask him to try and calm down and tell me what the problem was. I used empathy during his story and continued to let him tell his story. When you do that, it let’s people vent their emotions. As he talked, I saw things we could do to help him. When he finished, I told him I understood and presented him with a few options to resolve his problem. I held one back in case he asked for more and sure enough, he did. I presented the other offer and he accepted. Look, it wasn’t like I had any magic touch or anything, I just used the techniques I was taught and they worked!”

Making comments like, “Whenever I see this..... I try to do this.....” let’s your employees understand not only what you did but also your thought process in arriving at that decision. The way you reach a certain decision is more important than the decision itself. By teaching the methodology behind the decision, you let people learn how to make decisions the same way. You give them the tools they need to do their job. In short, you empower them.

People love to resolve problems themselves. All they need are the tools necessary to be able to do so. A good trainer / manager will do their best to

provide the tools and resources needed for a person to perform at their best. He will provide real life examples, guidance, and feedback to make sure people stay motivated and focused.

Lastly, a good manager / trainer will make themselves accessible to their people. They will make it easy for people to ask questions, make suggestions, and escalate certain issues they cannot resolve. This makes for a great team because the team has one important asset, a great leader, trainer, and mentor.

The Building Block Method of Training

Now that we have discussed the role of the manager or supervisor as far as training and Customer Service is concerned, we should invest sometime into what we feel is the very best method of teaching people of all ages new skills. The method we are talking about is called the **building block method of training**.

For most people, learning anything new is either an adventure or a chore. The truth is, the human mind craves the status quo and does not adapt itself readily to change. If viewed as a chore, one of two things are generally required for a person to readily agree to learn something new. Those two factors are circumstances or experiences.

Circumstances refer to events or situations that a person or persons have experienced in their lives which could have been different had they not lacked something within themselves. Examples of this had been losing a promotion because they lacked all of the requirements for the job. Losing a job and not being able to get another one because they did not keep their skills current, etc.

If the mind recognizes that it makes sense to learn these new skills to avoid having the same experience again, that person will become motivated to make the change.

Experiences are similar but might not have happened to them. They might have seen it happen to someone else or have been part of the experience and

felt another pain. Either way, when a person realizes there is something they can do to avoid or minimize things, they will become agreeable to do so.

For those who view change or learning as an adventure, these people get motivated by the challenge of it all and the benefits they see as being theirs when they are done with the task. There are a lot of people who just enjoy learning new things and broadening their skills. These are the people who we need to nurture and bring with us as we move up the ladder!

No matter which group you are in, we need to avoid trying to do too much at one time. Trying to get most people to ingest a large amount of information at one time often leads to failure. It is also very intimidating for someone to take a suitcase full of techniques and strategies and learn how to implement them all at once.

To help alleviate this situation, we recommend the building block approach to building new skills and improving existing ones.

The building block approach to skills building breaks down the skills into individual techniques, practices, or procedures. It teaches one at a time and the student learns a few easy to implement techniques and puts them into practice in their daily job. After they get used to those techniques and have committed them to memory and habit, they go on to more topics in the same manner.

You start with the basics and have the student implement them over time. Once the basics are committed to memory and the student is comfortable with their grasp of them, they can move on to more advanced topics, techniques, or practices.

This type of learning is very practical because it accomplishes the following:

- It does not create a large amount of learning all at once which may prove too intimidating to the student. If someone sees too large a task ahead of them, they might give up before they even get started.
- It also creates easier to achieve “goals” which make it easier to see progress and keep motivated. Just like a person who needs to lose 100 pounds would likely get overwhelmed at the task in front of them, having 10 pound “mini-goals” would set up easier to achieve points where they can get a feeling of accomplishment and stay motivated.
- It also allows the firm building of key skills on which to build. You cannot learn advanced skills until you have a solid grasp on the basics. The building block approach allows an individual time to master the basics before trying to tackle the advanced material. It allows a firm foundation on which new skills can be added.
- It allows people to “practice what they preach” in real-life situations and gain a working knowledge of what they were taught. With skills like customer Service Training, which is not a black and white process, the key to mastering the skills lie in learning how to interpret and apply what you have learned. It is easier to apply and understand something when you only have a few things to learn at a time. If you learn 3 techniques, you can consciously work on implementing all three at the appropriate times. If you try to implement 30 or 40 techniques at once, you will likely become confused.
- It allows people to commit certain skills and practices to memory before moving on. Once you do something without thought, you can dedicate your thoughts to something new without losing the other skills because you tried to move ahead too quickly.

The question is, how can we adapt different types of training to the building block method?

The easiest way is to use training written especially for this approach. This would be most of the “self-paced” training materials available in book form today. (All of our manuals at The Customer Service Training Institute are written in this format). With this type of training material, the reader simply reads the appropriate amount of material and then stops to take time to study and implement it. When they feel they are ready to move on, they read the next chapter(s) until they are ready to stop again.

With seminars and on-site classes, the task is a little bit harder. Scheduled courses that meet once or twice a week give you a little time to implement what was taught at the last class but the pace will still probably be too fast for optimum results. Seminars that last one-day have to cram everything into an 8-hour class and that is almost always too much material in too short a time.

In these cases it is best to take notes and try to create a timetable and list of techniques and steps you wish to implement. Break those steps down into easy to handle pieces and proceed according to your own timetable. The problem with this approach is often the materials furnished by the seminars consist only of a notebook for questions and answers and little detail of the technique or concept itself. You then must rely on your memory to let you know what you have to do. This is not the best of situations as we often forget much of what we learn soon afterwards if we don't apply it right away.

The first step is to form a list of the different skills, techniques, and procedures that you learned. Then arrange the list starting with the most basic to the most advanced. The idea is to start with the basics, form a solid base of skills

on which to build, and then move on to the more advanced items as you become comfortable with the basics.

As a manager or supervisor. It is necessary to monitor the progress of those in your charge. If you see people trying to move on with their training before they are ready, then you should make them aware of this and ask them to go back over the basics.

If you provide training to all your employees, it might be beneficial to set up a training schedule for everyone. Take your list of topics and tell everyone that during the next 2 weeks we are all going to concentrate on items 1-3 then next two weeks 3-6, etc. This way everyone will be on the same page and can learn on the building block concept.

If you are considering doing this, you must set up your schedule according to the **slowest** person in the group. If you set the pace with the fastest learner, you run the risk of leaving others behind as you move on. As long as the slowest person does not take a really long time mastering each stage, there should be no problem.

The pitfall of this type of learning is that we rely on the individual's commitment to actually implement and learn the material. This is usually not an issue if the people are motivated or if they are supervised and have their progress monitored. One way around this is to have a progress checklist or some document letting each person know what stage they are supposed to be by a certain date and have them sign off that they have completed that phase.

Nothing, however, is more efficient and effective as having the manager or supervisor get personally and professionally involved in the employee's training and development.

Why The Heck Should I do All This?????

There are some managers I worked along side who would be saying, “Hey, all this “touchy-feely crap” is just not me and a waste of time. I have a lot on my plate and I don’t have time for this nonsense. People should do their jobs because they have to and I should not have to congratulate someone for doing what they should be doing!” Heck, there are probably some of you reading this that actually do feel the same way!

Well, let’s look at this another way. By doing this, you will make YOUR life easier! How’s that for motivation?

As a manager, your success or failure depends on two variables. Your performance and the performance of those under who are in your charge. If there is a breakdown at either level, it is your neck on the line!

If you provide the training and resources to those in your department and monitor their development, three things automatically happen:

- 1) You have fewer customer complaints, situations, and problems.
- 2) Your staff has to spend less time on these customer service problems and will have more time for sales related tasks and company related matters. That means they will have more time to do things which you feel are more important to the company.
- 3) As a result of 1 & 2, YOU will spend less time with your angry customers and also fixing or repairing staff “miscues” which will free up a lot of your time to devote to more important and pressing matters.

Customer Service is important to the health of every company and the time spent learning these skills and techniques is well worth the effort and cost. However, time spent with angry customers is costly and takes time away from the employees that could be spent selling, developing products, creating new opportunities, etc. In this respect, time spent with angry customer is not time productively spent. (We understand that the time required to salvage a customer is valuable and should be considered so. What we mean is that the efforts expended in resolving complaints is not spent adding revenue to the company. There, in the perspective, it is not productive time.)

Every minute we can eliminate from the problem solving process translates into savings for the company and for the manager or supervisor. Every minute less spent on unnecessary activity mean more time that will be available for revenue generating activities.

Customer Service Training is designed to streamline the problem resolution phase of the problem. By eliminating wasted or counter productive statements or activities, we are able to resolve issues much more quickly. Plus, studies have shown that resolving issues faster most often results in resolving them far more economically as well.

The result is that by providing the training our employees and management require, we reduce our problem resolution costs, we free up more time for revenue generating activities, and we provide a much more positive customer experience for our customers. That leads to increased customer retention and the growth of our business.

But there is one more reason, and it is a very important one.....

Stress

Ask anyone in Customer Service if their jobs involve stress. Almost every single one will reply, “Yes!” to that questions! It’s just a fact of life in Customer Service. The very nature of our jobs involves becoming actively involved in the needs, complaints, and issues of our customers. That is bound to involve stress of one kind or another.

The other type of stress we routinely encounter is the balancing act between representing the needs of the customers versus the needs and policies of the company. We all know there needs to be a balance between the two or the relationship will not be a long term one. Not being able to give everyone what they want is bound to cause some stress in our daily lives. (Wouldn’t you just love to have the job of the person who processes the paperwork for those who win the lottery???) (Come to think of it, some people would have complaints about something there, too!)

Anything we can do to reduce this stress would be a great thing for all concerned. Wouldn’t you agree” Let’s look at some of the benefits of reducing stress in the Customer Experience:

- Stress causes emotions that carry over from one customer to the next. It is difficult to go from a difficult and stressful conversation to a bright and cheery one in seconds! What happens is the next customer “inherits” some of the emotions left over from the previous situations. Some people are better than others with this but it is still a major factor to be considered.
- Stress cause employee dissatisfaction and often leads to increased turnover. If your company has a lot of stress in their work environment,

employees will often leave for a less stressful job whenever the opportunity presents itself. Since employee turnover is bad for so many reasons, a company needs to do everything possible to minimize turnover.

- Stress also factors heavily into how your employees view their jobs and their customers. If employees are stressed out, they will likely not perform at all near their potential. In fact, when subjected to constant stress, employee performance will continue to decline over time.
- Stress has been proven to contribute greatly to a wealth of health related problems such as high blood pressure, heart disease, and has also been linked to the overall performance of the body's immune system. This increases a person's likelihood of catching colds, flu, etc.
- Employee stress also inhibits your employee's ability to function well as a team. When people are stressed, they look for all reasons for the stress including those around them. It is also possible for stress to cause in-fighting and similar problems among employees.

With all this in mind, I am sure you would agree that anything we can do to reduce stress would be a good thing. A reduction in stress is usually accompanied by an increase in customer satisfaction, productivity, and a reduction in turnover and lost time from work.

Well, Customer Service Training has proved to be extremely effective in teaching people how to relate to others and how to resolve issues and situations in a non-confrontational manner. The training teaches you how to diffuse a situation and how to calm people down so that everyone can communicate better.

By being able to accomplish the above, a suitable reduction in everyday stress is bound to occur. This is important for the manager to realize, as this becomes a powerful motivator in getting people to make a serious effort to not only learn the concepts but actually implement and practice them as well.

Imagine if you held a staff meeting and told everyone that there was a plan to reduce the daily stress level in the company. What do you think the reaction would be? Do you think everyone's ears would "perk up" just a little? Do you think the reaction would be extremely positive? Of course it would!

One of the major benefits of Customer Service Training is providing a low stress environment for both the customer AND the employee. The low stress level enables everyone to communicate in a more relaxed and efficient manner.

One of the main teachings in conflict resolution is the fact that the more angry or stressed a person becomes, the less effectively they will communicate. By using techniques to reduce the anger and stress, the customer communicates more effectively and can communicate their thoughts and ideas more accurately. The result is better communicate and faster resolution time.

It is important to realize that the reduction of stress is a benefit for both the employees and the customers. Always remember that customers are people and all people tend to avoid stressful or negative situations. If you can provide a customer with an environment that is very low stress, they are more likely to view your entire organization more positively.

Isn't that the end result we all are looking to achieve?

Creating A Customer Focused Environment

Though we may be repeating some material here, we really need to discuss what it means to be truly customer focused. Many companies advertise and brag about being customer focused but most of those companies haven't a clue what that really means.

We have talked about the need to make sure we look at things from the customer's point of view. That means every procedure, rule, policy, etc. needs to be looked at not only from the company perspective but also from the customer's point of view as well.

To be customer focused means just that. We have to focus on how everything we do affects our customers. Here are some questions you may want to ask yourself and your employees:

- Is the way we do business truly customer friendly?
- Do we have a lot of time consuming procedures and requirements that our customers dislike?
- Is it easy to locate and purchase our products?
- Can a customer readily get assistance or find information on our products?
- Do we offer flexible delivery or service appointments for two income families?

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- Is our paperwork easy to fill out and not too lengthy or involved?
- Is our staff customer friendly and helpful?
- Is our product selection varied enough to give our customers enough choice?
- Is it convenient to do business with us?
- Is it easy to resolve a problem with us?
- Do we offer things that our competitors don't?
- Do our competitors offer things that we don't?
- What do people like about our competitors?
- What do our customers like about us?
- What is our employee turnover?
- How is our reputation viewed in the community?
- What do you like about our company?
- What do you dislike about our company?
- What do you like about your job?
- What do you dislike about your job?

- If you could change any three things in the company, what would they be?
- Do you survey customers?
- Do you follow-up with customers after large sales or installations?
- Are our billing practices and paperwork customer friendly?
- Is it easy to contact us for information or when problems arise?

I could probably fill a few more pages with all kinds of questions and I don't even know the specifics of your business! From this short list, you can see all the factors that can be considered part of the customer experience.

The point I am trying to drive home is that **everything has to be addressed** if you are to consider yourself truly customer focused. Customer focused means the entire experience, including problem resolution, delivery, installation, everything must be looked at and addressed from the customer's point of view.

You help create this type of environment one procedure at a time. Tackle the large issues first and then "drill down" to the little things that might make all the difference in the world.

For example, you might decide to change the appearance and layout of your store to make everything more attractive and easier to find. This is a major item because every customer benefits from that part of the customer experience. Adding cashiers might fall under this heading also.

From there, you might recreate your product selection to include more choices and a greater selection. This would benefit a lot of people as well. From there, move on to the delivery department, then to billing, etc. until you have addressed each facet of the business.

But how do we know where our major problems, or highest priority tasks lie?

Well, the employees of the company probably have a good idea where to start but the best source for this information is your customer base. Ask them what they feel about your business and what changes they would like to see. Ask them some of the questions listed in the list a few pages back. Their answers will lead you in the right direction.

I am a big fan in prioritizing actions based on the reward you get from them. If I can spend an hour doing something that will affect 90% of my customer issues, then it makes sense to do that first rather than something that also takes an hour and benefits 10% of my customers. It is not that those 10% are not important; it is just that the time spent initially will help so many more people that it makes sense to do that first.

The exception to this rule is when there are things that have a safety or legal component to them. If that is the case, then you should deal with those issues first. The last thing your business needs is to get have a customer hurt or your business get sued, because you did not address a hazardous situation that you knew about.

The Managers First Step!

Well, we're finally here. First of all, I would like to congratulate you on taking the time to read this manual. I also would like you to know that I appreciate your commitment and your realization that Customer Service Training is an important part of preparing you and your staff for working with your customers. Sadly, many businesses, and their managers, still fail to grasp this simple concept. Because you do understand it, that places you light years ahead of the others! You really are to be congratulated!

But how do we take the first step as a manager?

Well, in order to lead and motivate, you need to understand and learn the materials as well. So, the first step any manager needs to take is to get the training themselves. Even if you already have the skills, you should take the training that is going to be provided to your staff. There are several reasons for doing so. (Please understand that this applies to Customer Service Training and not necessarily to technical training which may not be needed by all personnel.)

First, if you are to teach and evaluate your staff, how can you accurately do so without knowing what they were taught? You cannot hold someone accountable for things that were not taught or discussed, or presented differently than you learned them. You can instruct others to do something your way instead, but you should still know what they were taught.

Second, how can you tell someone how good the training is if you have not taken it yourself? By requiring others to take something you have not taken yourself, you have kind of said, "I'm too important to take this training" or "This

training is not worth my time.” Is either of these messages something you wish to convey to your staff? How do you think they would embrace the training if you gave the impression it wasn’t worth your time?

Third, no training is perfect (ours comes darn close.....) and there may be items either missing or industry specific examples that you may wish to add to the training. How would you know this if you had not taken the training as well?

Fourth, and maybe this should have been first, but if you don’t take the training, how will you know how good it is, how relevant it is, and how appropriate it is for your specific application. That is why a lot of managers will take a seminar before their staff so they can determine the suitability before authoring the costs.

Remember, part of your role as a manager or supervisor is also to be a mentor, leader, and trainer. That requires a high degree of understanding of the concepts you are there to support. This kind of understanding can usually only come from experiencing the training yourself.

One thing I recommend to all managers and supervisors is after you take the training, attend the seminar, or read the book, try and develop an implementation plan that addresses your needs and your staff. There is no cookie cutter plan that works for everyone. The best way to design one is to take your needs and figure out how to best address them.

To help guide you down the path to creating your plan, here are a few suggestions to think about:

What Type of Training - Will you have people attend a seminar or use the self paced method of training? Would you hire a trainer to present the seminar in-house? How about local college courses? Tech schools?

How Will You Train? – Will you train in one large group or several smaller groups? Generally smaller classes work best for sharing of thoughts. If you manage a department that operates over several shifts, how will you get everyone trained on time?

How Will You Implement? – Everyone needs a plan to introduce something new into his or her job. How will you accomplish this?

How Will Progress Be Monitored? – How will you monitor who is doing well and who needs help?

How Long Will This Take? – How long will training take? How long to implement the training into the workplace? How long until benefits of the training are seen?

How Will I Introduce This To My Staff? – We talked about how we introduce something will affect how people see it and how well they will commit to it. Write up how you will present this and make it sound as positive as you can without going over board. Stress benefits to the staff for making the efforts.

The key to successful implementation of Customer Service Training is to have an organized plan that includes not only the actual training but also ways to implement and apply the concepts learned during an actual workday.

People generally are more effective and remain committed longer when they are comfortable and confident. A very easy way to accomplish this is by proceeding in a slow and controlled way. Using training materials designed on a building block approach allow you apply the initial concepts and allow you employees to feel comfortable with them before introducing anything else “to their plate.”

The trouble that most people encounter whenever they try to learn something new is that often there are many things to learn and master in order to be successful. If everything is taught at one class or seminar, or even a course, it is difficult to implement what you learn all at once. In some cases it is so difficult and intimidating, the person just gives up.

Our brains love success. They love achievement and the feeling that comes along with it. If your implementation plan gives people that great feeling, your efforts will be successful. If it doesn't, you stand to fail.

One easy way to keep people motivated and excited is to have several points in your training where recognition or praise is given. For example, you might break down Customer Service Basic training into 5 or 6 mini-lessons. After everyone completes and implements a mini-lesson, their progress and achievement is acknowledged.

When this happens, people see progress. They see one goal achieved and they believe they are capable of achieving the next goal and the one after that. It's like looking ahead at college and the four years it takes to complete. Then you stop, and take it semester by semester. When you get your grades, you look ahead to the next few months, not the next few years.

Presenting things in bite-sized chunks makes them far less intimidating allows for the brain to see progress much faster and much more often. Sometimes, however, this will not be possible. In those cases, what should you do?

Well, as we said, sometimes there will be a problem so severe, or a deadline that is so close, that you will have to throw the book away on mini-goals and go for speed and results. When this happens, your involvement in the process becomes even more important.

Under pressure, most people need some hand=holding and constant encouragement. As a manager, you are charged with making sure people do what they have to so the goals can be achieved. That means the manager and supervisor have to keep a tight control over the process and closely monitor the progress of each individual and the entire group.

The key to pressure situation and tight deadlines is resources. What resources do your people need to have the best chance to succeed? If time is an issue can you give people rotating time off to train and study? Can you provide resources for group study? Maybe bringing in food after hours to help people work in groups so that they can help each other.

There is no cookie cutter approach or one simple plan that works in all applications.

Conclusion

A good manager knows that managing people is more than scheduling and staffing. It means working with processes and people to make sure everything operates at its very best.

We now know the importance of developing their people and improving their skills and capabilities. We must take the steps to allow our people to thrive and grow in their positions. Failure to do this will increase employee turnovers and dissatisfaction.

We also now know that to get the most from our people, we must be both a role model and a resource for them. We must show them how we want things done and be an example of what can be achieved by following established

procedures. In short, we must show them what they CAN be if they buy in to the process.

We also know that people usually need some form of motivation and encouragement in order to stay committed to a process or change of any kind. We understand now that the time spent on this motivation and encouragement is repaid many times over in increased performance and process improvement.

Training is an effect way of getting everyone on the same page. We know that in order to produce a uniform customer experience, everyone must receive the same training and implement it in a similar manner. We also know that it is the responsibility of the manager to make sure that happens.

We know that a manager is the one responsible for the performance and actions of those in the department. We know that managers are tasked with seeing the big picture and identifying areas of improvement or lacking processes. Identifying problems and creating processes is a task which every manager should involve their employees in to get their perspective and input.

We also know that customer service, and the customer experience, is not a one man or one department issue. It involves people from almost every area and department of the company. From product development, through marketing, selling, warehousing, accounting, and follow-up support, everyone is responsible for the overall customer experience.

We understand how everyone must be encouraged to provide input as well as take steps to insure their part of the process is handled as professionally and efficiently as possible. Only when everyone does their part can a company truly become customer focused.

Most important, we have learned how critical it is that we look at everything not just from our perspective but from the customer perspective as well. By looking at things from the eyes of the customer, we can highlight and identify areas of potential concern that might otherwise go unnoticed.

Lastly, we hope that those managers who had viewed this approach as some kind of “touchy-feely” nonsense now understand the value of looking at things from the customer’s point of view. We hope the concept of motivation, recognition, and praise are now valid practices whose value cannot be measured.

We also realize the need to take the time to treat all our people with the respect that they earn and deserve. We understand that through this kind of treatment we encourage and reward their contributions to the company’s constant improvement. We also realize that through everyone’s contributions, we can get to where we always wish we would be:

A truly customer –focused business where customers love to come and shop, purchase, and recommend to others.