

CLS Study Guide



Sponsored by the Customer Service Coalition



This study guide will assist those embarking on the Customer Loyalty Specialist certification by detailing the exam structure and categorizing the study material within each content area.

The content of this guide is as follows:

- I. Customer Service Coalition Overview
- II. Program Details
- III. Program Completion Timeline
- IV. CLS Exam Preparation
- V. Required Reading
- VI. Six Modules and Corresponding Keywords
- VII. Sample Exam Questions
- VIII. Frequently Asked Questions (FAQ)

I. The Customer Service Coalition (CSC) Overview

The Customer Service Coalition (CSC), an industry networking association, sponsors the Customer Loyalty Specialist certification (CLS). The mission of the CSC is to enhance members' opportunities for professional success within the customer service arena across a broad range of industries, by offering a wealth of informational, career advisory and professional expertise.

II. Customer Loyalty Specialist Certification Overview

The CLS certification is designed to ensure participants obtain the broadest spectrum of knowledge regarding the behavior and strategies necessary in securing a loyal customer base. By testing the depth at which that knowledge has been comprehended and digested, the CLS prepares individuals for successful, real-world application.

III. CLS Program Timeline

The CLS Program is offered on a revolving basis to 100 participants per session, and you may start and complete the program on any timeframe you wish. Once you enroll you can immediately select your examination date or wait until you feel ready for the examination and then email us with your preferred testing date.

The dates you may choose from include January 15th, April 15th, July 15th, or October 15th of each year. Most professionals take 2-4 months to prepare for this examination after they register for the program.

IV. CLS Exam Preparation

Candidates should purchase all of the required reading materials and use the outlines provided in this study guide.

The suggested keywords indicate important subject areas and will prove helpful to master.

Given varying levels of comprehension, each individual has different time investment needs, making it impossible to specify the amount of study time necessary to successfully complete the exam.

The CLS exam is offered twice per year and is a two-hour exam administered online.

Exam Composition

Topic	Number of Questions
Customer Service Overview: <ul style="list-style-type: none"> • Industry trends • Common practices • The current landscape 	17 Multiple Choice Questions
Customer Loyalty: <ul style="list-style-type: none"> • What defines it • Why it's the ultimate goal of any service provider • Practices to pursue and secure it. 	16 Multiple Choice Questions
The Customer: <ul style="list-style-type: none"> • What creates and influences their perceptions and expectations. • Their needs and wants; how to uncover them 	17 Multiple Choice Questions
Problem Solving <ul style="list-style-type: none"> • How to handle issues • Work within acceptable terms to satisfy the customer • Dealing with difficult situations and people 	17 Multiple Choice Questions
Company Culture and Organizational Leadership <ul style="list-style-type: none"> • How company culture, attitudes and leadership impact customer service • The existing skewed perceptions and what companies must do to improve 	16 Multiple Choice Questions
Effective Communication Skills <ul style="list-style-type: none"> • Phone • Email • Phrases • Evaluation techniques 	17 Multiple Choice Questions

Content Will Vary	2 Essays
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V. Required Reading – Purchase at <http://CustomerServiceBookstore.com>

1. Delivering Knock Your Socks Off Customer Service by Kristen Anderson and Ron Zemke. ISBN :0814479707
2. Building Great Customer Experiences by Colin Shaw and John Ivens. ISBN 1403939497
3. Customer Satisfaction is Worthless, Customer Loyalty is Priceless by Jeffrey Gitomer ISBN:188516730X
4. How to Talk to Customers by Diane Berenbaum ISBN: 0787987522

Review and purchase all 4 of these books at <http://CustomerServiceBookstore.com>

Book Outlines

Information from the following books will comprise the exam questions.

1. Delivering Knock Your Socks Off Customer Service by Kristen Anderson and Ron Zemke. ISBN :0814479707

Anderson and Zemke give the truth, straight and simple, about truly *great* customer service and the components of relationship building involved in any interaction. Outlining behaviors and problem solving tactics, their strategies ensure delivery of the highest standard of service every time.

This text is necessary preparation for the CLS, giving a fundamental overview of what excellent customer service should entail, along with the basic measures in how to achieve the ultimate level of service.

Book Outline

Part I: The Fundamental Principles of KYSO (knock your socks off) service

1. The one unbreakable rule:
You ARE the company- use I instead of we, don't mention policy
2. Know what KYSO service is:

3. **Reliable**-keeping the service promise

- a. Organizational commitments: Through ads, communication materials, product warranties, etc. the company has promised certain things in the eyes of the customer.
- b. The customers' expectations take the form of promises in their minds common expectations-from past experiences, competitor interactions and expectations, they bring these preset perspectives to the table
- c. Personal promises-promises you or another employee has made you must manage these promises- once you know what they expect, you must formulate the promises you make based on what you actually can and cannot do for the customer.
- d. When promises are broken- first apologize, don't place blame.
- e. timing is everything - find out what the customer now needs and do what you can to provide it in feasible, reliable terms and facts.
 - find out the customer's time frame-how soon is soon? What do they expect from you
 - When setting a deadline, be realistic and be certain you can meet it.
 - Customers will be more dissatisfied with uncertainty than having to wait-give them the whole truth.

4. **Responsiveness** - it reassures customers when you follow through on your promise- delivery schedules for example are especially important.
5. **Reassuring**- being friendly and well mannered goes a long way, but proving your competency and reassuring the delivery of results is what matters.
Trust is built on your knowledge, comprised of:
 1. Product knowledge-features, benefits, advantages etc.
 2. Company knowledge- know how the organization works so you can guide them to who can really help them
 3. Listening skills- expect you to listen, understand and respond to any inquiry. Ask pertinent questions to uncover more information of the issue in order to get to the heart of the problem to fix it.
 4. Problem solving skills-customers expect you'll recognize their needs and quickly align them with services your organization provides. They expect you to be able to fix whatever goes wrong fast.
 5. Not just first impressions, but the entire interaction conveys your competency. Your mannerisms, dress, couch, etc. all can either help reassure a customer or hinder obtaining their trust.
6. **Empathetic**-Everyone has different emotional states and responds to different approaches-customize your strategy to their personality to generate better results.
 - Empathy vs. sympathy--sympathy means identifying with and even taking on another's emotion, whereas empathy involves acknowledging and affirming another's emotional state.
 - Be emotionally aware and sensitive, but remain emotionally uninvolved.

Essential to stay calm and professional, while still showing you care
7. **Tangibles**- it's tough to define and describe an experience or feeling. While it's hard to put service into tangibles, it must be- all about quality not quantity.
 - Tangibles help convey value
 - They help educate customers and allow them to evaluate your quality of service
 - Little things such as handing them a product or writing down their information to prove you'll remember, are tangibles
8. Customers are everywhere- inside and out
 - External-those that buy your products and services
 - Internal-employees-their work and success is dependent on your work-identify them!
 - Treating internal well conveys a positive perception to the externals
9. Ten deadly sins of customer service

1. Saying I don't know-customers expect you to know the answer or at least who else does that you can put them in touch with. Say I'll find out instead
2. I don't care-reassure them, show you care!
3. I can't be bothered-the customer is your first priority above all else-show them they are.
4. 'I don't like you'-customers can be sensitive to subtleties, do your best to convey friendliness and hide any personal grievances.
5. 'I know it all'-Don't get at solving the issue until the customer has fully communicated their problem---listen first, then act.
6. 'You don't know anything'- don't be condescending, help them understand it versus belittling them. There are no dumb questions
7. 'We don't want your kind'-don't judge anyone and be sure not to appear that you are-regardless of race, dress, etc. treat everyone equal, you never know who could turn out to be the best customer.
8. 'Don't come back'-don't act inconvenienced, annoyed etc. convey you want to see them again in the future.
9. 'I'm right and you're wrong'-don't argue with them, it's a personal pride issue; instead try to give them the benefit of the doubt.
10. Hurry up and wait-don't waste their time, ever!

Make the customers feel:

Heard, understood, liked, respected, feel helped, appreciated and respected.

10. Customer service is always-the Customer

The customer is NOT always right

- without admitting the problem and misunderstanding, you cannot solve it.
- How to make the customer right?
 - Assume innocence-they may be explaining it wrong or are simply misunderstand—help them obtain the correct information without making them feel dumb.
 - Look for teaching opportunities: what information could they have used before the issue arose?
 - Make sure they get it all and are in the state to be receptive-angry people often don't want to be told or taught anything.
 - Believe them-try to see if anything they are saying is in fact true. It's better to assume than to write them off as wrong.
 - Verify info. In front of them-double check the rules, etc.

Part II

11. Honesty is the only policy because:

- It always catches up to you
- Customers respect honesty

- You feel good about yourself, which translates in your performance

12. Broken Rule

- Purpose of rules is to make things run more smoothly, effectively and organized, yet not all achieve this goal
- Rules vs. assumptions
- Don't assume there's a rule-find out for sure!
- There are types of rules: Red and Blue
 - Red: Serious consequences, often legal, safety, etc. and cannot be bent
 - Blue: More policy centered and often need adjusting based on the scenario-use your experience and judgment to decide proper changes-know your own limits and when you need to check with manager.
- Learn why a rule is there in the first place- that will allow you to determine its color/type, and know its nature, consequences, etc.

13. Do the right thing, regardless!

- Knowledge-know company rules, why they're there, etc. knowing customers needs and expectations is also critical, along with the technical aspect to the job and the personal skills necessary to deal with problems.
- Action-oriented- take initiative, own the situation.
- Making judgments based on customer needs/use of the product. The 'policy' is to provide and often not in 'told' ways.
- Does the real situation
 1. Break a red rule
 2. If it's a blue rule-what's the result-why is it and what are the consequences
 3. Who should make the final decision-are u in a position to or should you check with your manager?

14. Listening as a skill- use it!

- When you listen well you:
 - Determine the customer's wants and needs
 - Prevent misunderstandings
 - Get clues on how to improve service, increase sales
 - Build long-term customer relationships
- Listening can be learned – time while listening to uncover the main points
 - Write stuff down-begin formulating ideas, but don't lose focus
 - Use it to reflect back-confirm what you heard
 - Ask if you're unclear on any of it
 - Reiterate critical information- spellings, contact info, etc.
- Barriers to effective listening
 - Noise-can you hear them well?
 - Interruptions-don't get distracted- says you don't care enough
 - Daydreaming
 - Technical issues-can't hear well, know how to operate the tech. systems

- Stereotypes-sets up false judgments that are difficult to overcome later
- Trigger words and phrases-don't let them get you
- Personality-know different types and tailor your approach accordingly
- Attitude-be positive, objective- don't get defensive, it limits you to hearing only what you want/expect to.
- Listen for what you don't hear! Underlying issues, feelings, perceptions, etc.

15. Ask intelligent questions!

3 types of questions

1. Background- intros-tells you who they are, profile, etc.
 - i. Helps you evaluate if you are the right person to take call
 - ii. If protest anything, preview it and tell them you need to ask certain about certain information for their benefit.
2. Probing-delve deeper into the issue
 - i. Closed and open ended questions
 - ii. Ask them to tell you more
3. Confirmation questions
 - i. Checks & balances system-ensures you are correct and have everything you need-don't patronize when clearing up any questions they have-figure out why they don't fully understand and work with them.
 - ii. When questions go wrong.
 1. Timing-is it out of context?
 2. Ask something they think u should know already
 3. Too many questions
 4. Too personal-ensure confidence and preface it'll be for their benefit

16. Winning words and soothing phrases- review list of phrases- avoid conveying 'I think you're stupid'

17. Face to Face-Non-verbal communication

9 basic dimensions:

1. Proximity
2. Eye-contact
3. Silence-don't be awkward, but prove you're listening
4. Gestures-body language
5. Posture
6. Facial expression
7. Physical contact
8. Smell-easy on the cologne
9. Overall appearance

Read they're non-verbal clues—what's their perception of you? Be perceptive yourself?

18-Tips for the phone

- *Style-*
 - Audibility

- Clear articulation
- Steady pace
- Pleasant tone
- Enthusiastic
- Techniques:
 - Answer quickly,
 - Greet courteously
 - Identify yourself to caller
 - Transfer calls professionally-try to avoid, explain why and give new contact info
 - Putting customers on hold-ask their permission first
 - Take complete and accurate messages-reiterate info back to confirm
 - Voicemail-be as specific as possible-when you'll be back, what info to leave, etc. and return as calls ASAP.

19. Putting Pen to Paper or Fingers to Keyboard

Your message- you write to:

- Confirm understanding-follow letter is a form of confirming info via written communication.
- Create documentation- paper trails help keep evidence of progress or to back-up a verbal conversation.
- Solidify relationships – helps make tangible and memorable fleeting in-person interactions- thank you notes, etc.

Letter writing tips

- Be neat and legible
- Use co. letter head
- Use standard paper, unless it's a small personal note
- Be concise-keep it to 1 page or less
- Write in first person and in active tense
- Write how you speak-don't sound bureaucratic
- Write with correct spelling and grammar.
- CONSIDER YOUR AUDIENCE! –Watch jargon, etc.

E-mail tips

- Be personal
- Don't use a lot of italics, bolds, etc. keep it simple
- Don't YELL- be cognizant of how your text sounds
- The outcome: your correspondence must clearly communicate the action, if any, they need to take—what do you expect to come from that writing? Make sure your words get that across.

20. Exceptional Service is in the details -Attention to detail-everything counts!

The moment of truth-anytime anyone comes in to contact with your organization-employees, product, ads, etc.

Managing the moment of truth:

1. Never stop learning-as experienced as you may be in your role, there's always more to learn and new situations to handle and new customers to deal with.
2. Ask your customers-the only real way to identify customers' particular moments is to get them to describe them to you
3. Ask your company- ask for survey stats and other studies your co. does to help you identify other moments.

It's the little annoyances that drive customers away more than the big issues.

21. Good selling is good service-good service is good selling

- Sales and service both have ultimate goal of satisfying the customer, but selling is not good service if:
 - There are no alternatives provided
 - When there is no slack-, no chance to redeem and they're mad and unwavering
 - When there is no point- don't add something on that has no relevance

When selling is good service

- When the product or service the customer acquired from your company is right but there are missing pieces or another process is needed
- When the product or service is out of date-suggest upgrade, give free trial but offer new product for purchase
- When the model or system the customer is using is wrong and you know which is right and help orient them toward the better option
- When an add-on feature will forestall other problems, suggesting an extended warranty when problems have already occurred and are probably bound to reoccur.
- When changing the customer to a different product or service will be seen as value added or TLC- making appropriate tweaks and changes to better service customers.

22. Never underestimate the value of a sincere thank you

Nine times when you should say thanks

1. When they do business with you-every time
2. When they compliment you
3. When they offer comments or suggestions
4. When they try a new product or service-trying something new can be uncomfortable-be sure to tell them you recognize this and appreciate it
5. When they recommend a friend to you

6. When they are patient- and not so patient
7. When they help you to serve them better- when customers do their research and help the process
8. When they complain to you –it’s feedback-now you have the chance to make them loyal customers
9. When they make you smile

Three ways to say thank you- and do so immediately!

1. verbally-say it after every encounter-say it with feeling-warm, pleasant, personal
2. in writing-send a follow up note
3. with a gift-make sure the value of the gift isn’t out of balance with the nature of the business involved.

Often forgotten to receive a thank you

- co-workers- give credit your colleagues deserve
- your boss
- people in other departments
- thank your vendors
- thank yourself

Part III: The problem-solving side of knock your socks off service. -be fantastic fixer- customers don’t expect everything to be perfect, but they do expect you to fix it, fast and correctly-the art of recovery-decide which method fits the customer and situation:

- apologize
- listen and empathize
- fix the problem quickly and fairly
- offer atonement-help make it up to them
- keep your promise
- follow up-don’t assume you’ve fixed the problem, make sure!
- Take immediate steps to solve problems-that sense of urgency tells the customer the recovery is important to you.

24. Use the well placed ‘I’m sorry’

- Fully understand your co’s legal policy-sometimes sorry is an admission of guilt and can lead to lawsuits
- Saying sorry is critical, regardless of fault. If it is in fact the co/products’ fault, say ‘I’m sorry we inconvenienced you’-use the we here, unless it was your fault personally.
- say ‘I’m sorry to hear that thank you for bringing it to my attention’-when the customer is at fault-faulty use, carelessness, etc.

Don’t scapegoat-just apologize for the company. Don’t give vague, insincere apologies. Apologies should be personal and timely.

25. Fix the person -don’t get emotional too fast

- recognize their feelings and don't take it personally
- Ornery*- shows irrational and slight frustration-handle them badly and they can fly into a rage. Deal with them:
- Show urgency
 - Enlist the customer in generating solutions
 - Create added value

Raging red

- Show empathy
- Allow venting
- Listen actively
- Plan follow-up

26. Fair-fix the problem- fixing problems is a learned skill-here's the framework:

1. Listen to find the problem-you listen to:

- a. allow them to vent-helps 'fix the person'
- b. find the problem

2. Probe for understanding and confirmation

- when upset, they may not explain adequately- looking for an explanation conveys you are accepting that it is a problem and are there to deal with it

3. Solve- find and implement a solution

4. Involve them in finding a solution-offer up the options and if they aren't receptive to them, you may not have all the info. you need about the

issue. 5. Atonement-the extra step-the ultimate goal is to retain the customer and repair that relationship-in many circumstances this method is helpful to secure that.

27- Customers from hell are customers too with the worst customers:

- Develop some perspective-they're the minority- don't take it personally
- Remember that you're the pro-you know your product, company best
- Master the art of calm-don't take any of it personally-remain open and passive.

The obnoxious customer-approaches:

- See no evil, hear no evil- if you acknowledge they're awful then you're bound to treat them as such
- Ask them if you've done anything to them personally-then ask for the chance to help them- they're rarely disagree
- Transfer transformation-sometimes you can't deal with them, pass them to supervisor or peer, telling them that person is better equipped to handle their situation.
- Build contractual trust- if they cross the line, especially in a face-face situation- tell them you cannot accept their behavior and cannot serve them unless they change.
- Use I statements here to let them know they're crossing a personal boundary and you will take action unless they stop.

Part IV: KYSO Service fitness-taking care of you

- Master the art of calm- take deep breaths, organize your desk, take a walk, smile, laugh, vent a little out of customers' sight and try to relax if it all gets to be too much.

- Keep it professional – friendly relationships don't mean they're your friends-friendship involves activities outside of work- keep it professional but with a friendly touch
- Being too friendly can make others uncomfortable- other customers may think you're giving preferential treatment.
- Involvement varies-when friends have problems, you sympathize, etc. but it's not your job to fix it- customers on the other hand, it is and you remain emotionally uninvolved.
- Remember: Always be learning! –you're never done training- there's always new customers, situations, etc.

2. Building Great Customer Experiences by Colin Shaw and John Ivens. ISBN 1403939497

Ivens and Shaw intricately detail the current industry landscape, offering bold statistics revealing the tendency of many companies to fall drastically short in delivering effective customer service.

The behavioral strategies and specific tactics outlined throughout the book distinctly depict how to reverse this alarming trend and ensure lasting customer relationships.

The abundance of exact information in this text makes it a key resource for the CLS, with a thorough explanation of the detriment organizational-wide behaviors can have on successful relationships. The correlation between these actions and the proven statistical loss of revenue and market share provides direct evidence of the vital role customer service plays within any business.

Book Outline

1. The customer experience tsunami

- Increasingly affluent society is far more demanding—conventional differentials are losing weight as the experience becomes a leading influencer on customer perceptions.
- The physical and emotional customer experience- blended together, both affect successful customer loyalty

The Seven Philosophies for Building Great Customer Experiences

Great Customer Experiences are:

1. A source of long-term competitive advantage
2. Created by consistently exceeding customers' physical and emotional expectations- must know what they expect (both physically and emotionally) first to then go beyond that to 'wow'
 - a.problematic when co policy doesn't align with particular expectations

3. Differentiated by focusing on stimulating planned emotions- co's create and build emotion around the brand, but most ensure delivery of that emotion and correct reception
 4. Enabled through inspirational leadership, an empowering culture and empathetic people who are happy and fulfilled.
 5. Designed 'outside in' rather than 'inside out' - build it on needs/wants of customer, not company
 6. Revenue generating, and can significantly reduce costs
 7. The embodiment of the brand
2. The physical involves the 'what'-the product, price, quality, etc.
- a. The physical has lessened in impact due to innovation, speed and commoditization. – lag time between innovation and imitation is much shorter
 - b. the physical is comprised of the: service, accessibility, location, delivery, range, price, products, environment, activities, and quality.
 - i. May need to look across multiple industries to adopt best practices
 - c. Globalization has enabled innovations, increased speed, lowered prices, etc.- it is very expensive to redefine your physical products.
 - d. While the product is of key importance, the experience begins before it is every purchased, hence the critical role of service, perception and building an experience.
 - i. Stages of the customer experience: Co's must evaluate each stage and what they're doing to address the emotions at each.
 - ii. Expectation setting – brand image via ads, word of mouth etc. has built preconceived ideas and perceptions
 - iii. Pre-purchase interactions-all activities that lead to the purchase- looking for info on the web, etc.
 - iv. Purchase interactions-begins when decision to buy is made-potential for decline in experience at this stage- critical point
 - v. Product or service consumption
 - vi. Post-experience review- intuitively review your opinion of product and determine coping factor in order to deal with any inefficiencies. This works back toward the beginning of setting expectations.
3. The emotional is the experience- how you felt throughout the purchase process- emotions are more overlooked-how did you feel at the time, was it negative or neutral or great? It's not just what you do but what you fail to do.
- a. An experience is an interaction between an organization and a customer-can be momentary or a lifetime. As consumer absorbs co's message, emotions accompany that reception.
 - i. Important for organization to engage customer long enough to deliver entire message, and ensure its accuracy.
 - ii. Perception is reality framed by the past- includes what they've been told, seen, read, etc. – expectations preexist.

- iii. A lot of the experience is intuitive, based on that past.
 - b. When stimulating planned emotions, the targeted emotions must align with the brand.
 - i. Important emotions, such as trust, you must gain a benchmark of current situation and then address the specific concerns involving the underlying emotion of trust. Trust must be built over time and is a two-way street. Commit yourself to what you promise, and be realistic.
 - ii. How do you build trust, or other emotions? To build trust, create transparency- for example: have a tracking # available or a confirmation # to assure customers their order won't be lost.
 - iii. Loyalty is an emotion-it's about security, association with success...it's a feeling or support or allegiance and is about the depth of feeling. It's tested when things go awry and varies on frequency--- how often is the customer experience encountered? Does the initial wow lose its luster? People build emotions around things aka sentimental value.
 - iv. Sophistication of expectations- what have they been previously exposed to that will set their perceptible barometer?
 - v. Customer emotions cannot be controlled, only the emotion stimulated by experience- if they're nervous, a delayed flight matters far more, etc.
 - c. Know what the real customer motivators are in every experience
 - i. Presenting problem- why they're calling, what they're directly asking for
 - ii. The real motivator- what problem are they trying to solve, the nature of the need/want behind the request—knowing can help improve process, and potentially generate more business and/or loyalty. It saves costs as well by reducing number of calls necessary, etc.
4. The effect of organization, multi-channels and moments of contact on the customer experience
- a. Multiple channels exist, beyond the traditional that impact the customer experience and must all, collectively, deliver a great experience.
 - Channels and the purchase stages involved:
 1. Shops (pre and purchase decision stage)
 2. Advertising (expectation setting stage)
 3. Telephone account manager
 4. Account manager
 5. Specialist salesman (pre and purchase stage)
 6. Internet (expectation setting and/or pre and purchase and consumption)
 7. Telesales (expectation and pre-purchase)
 8. Direct mail (expectation setting)
 9. Hospitality (consumption)
 10. Customer events

11. Newsletter
12. Email campaigns
13. Contact centers
14. Field engineers
15. Help lines (consumption)
16. PR (expectation setting)
17. Debt collector (consumption and/or post experience)
18. industry specific ATM's, meter readers, personal bankers (consumption)
19. Billing (consumption and/or post consumption)
20. Service centers, etc. (consumption)

Why have so many channels been created?

- To provide another mechanism to talk with customers
- In response to a competitive move, to increase sales- more distinct points
- Reduce costs
- Increase coverage and distance
- Improve customer experience
- Forced by M&A activity.

b. The typical structure of org. channel function is as follows:

1. Marketing: telemarketing, direct mail, customer events, contract center, hospitality, third parties, internet and market research.
2. Sales: Sales, account manager, telesales, tele-account manager and lead generator
3. Service: service centre, helpline, customer care, complaints
4. Operations: field engineering, second line service and support.
5. Finance: billing and credit checking

c. Managing the customer experience increases in difficulty the greater the distance between the brand owner and the end user

d. Addressing the issue and creating more an outside-in approach to choosing effective channels can help improve the customer experience and save costs by identifying the overlaps.

i. The cost of each channel varies and harnessing the most cost-effective one that the customer prefers can help the company tremendously.

ii. Channels by cost from lowest to highest.

- Internet
- Direct mail
- General call centre
- Helpline
- Contact centre
- Specialist telesales
- Telephone account manager
- Sales person
- Specialist sales
- Account manager

- Senior account director

Areas most likely to have cost cutting opportunities:

- Reduce overlaps- controlling overlaps of contact paths can help reduce costs
- Reduce cost of failure- remove need to employ coordination points whose sole task is to plaster over problems.
- Resources in right place-customers have become more sophisticated and are using a variety of channels. Reallocating assets to improve the most used channels will improve the experience.
- Transactional costs against customer value- are the current contact paths profitable? Do they add to value in the long term? Often the largest customers are the most costly

When evaluating channel costs, consider: transactional costs, ability to deliver defined customer experience, type of relationship required with a customer, whether any competitive advantage can be gained, the skills in the organization, the infrastructure available, frequency of contact, complexity of the product, how able the moment of contact is to convey the emotional side of the customer experience.

e. It is important to know the confidence and sophistication of the customer- Innovation and change of channels will continue as time goes on and therefore necessitate the need for constant revaluation of channels' cost-effectiveness from the outside-in.

5. The implications of processes and systems on the customer experience

a. Outside in- build-- strategies and systems around customers' needs and emotional engagement

i. Common problems occur:

- a. No involvement from customer or customer input
- b. No ownership of the overall process
- c. Process developed by employees with zero awareness of or interaction with customers and their experiences
- d. Processes are developed by committees and are massive and misaligned
- e. Many steps get repeated and lose precious time
- f. They're too internally focused
- g. Fat is built in so that achievement of 'targets' is easier
- h. They aren't regularly reviewed

b. Consistency is key to building a great customer experience! Know what the customer experience is, can you define it? Can't deliver what you don't fully understand.

- a. Not all systems and processes need to be huge and expensive undertakings-the littlest tweaks can make a huge difference.

- b. Don't build systems that are big, timely undertakings and involve a somewhat impersonal process.
- c. Capture good information that can help further personalize the customer experience.

Four perils of CRM:

- 1. Implanting CRM before creating a customer service strategy
- 2. Rolling out CRM before changing your organization to match
- 3. Assuming that more CRM technology is better
- 4. Talking, not wooing customers

c. Technologies can cause problems too, for instance interactive voice recognition (IVR) frustrates most customers because it isn't well routed and the wait time is long. Keep menus and lag time short!

Also annoying emails, pop-ups, too much mail can annoy customers and cause more harm than good.

- 6. People: a key differentiator
 - a. Important people to you care about you, listen, etc. It's all about how they make you feel- same goes for CS. The RIGHT people are an organization's greatest asset.
 - b. Emotional intelligence- it's beyond IQ, are they empathetic?
 - i. Knowing own emotions- self-awareness
 - a. Know when you're angry and incapable of dealing with a customer or when you'll overreact
 - ii. Managing those emotions –self regulation
 - a. You know how your feeling/acting, control it!
 - iii. Recognizing emotions in others- empathy
 - a. Recognize emotions in others and align your actions with them
 - iv. Motivating oneself- motivation
 - a. Be enthusiastic! Act happy and proactive in your role
 - v. Handling relationships-social skills
 - a. Knowing how to forge relationships is key - small talk, carry on enjoyable conversation, etc.
 - c. Hire those with these qualities-people who handle stress well, are tolerant, flexible, can solve problems, independent, etc. train them with additional skills and work to enhance their preexisting ones.
 - d. Your people should display your brand value throughout their interactions, in all stages of the customer experience.
 - i. People need to want to be there, and be in a customer-facing role. Employing the right people for the job is critical.
- 7. The massive impact of leadership and culture- Leadership is everything! Without it, all other efforts cannot succeed.
 - a. They need to be good role models in addition to having leadership qualities and an embodiment of the brand and customer experience

- b. Is top leadership fully aware of their customer service practices? Top leaders need to be on the front lines, testing the product, experiencing it as the customer does to fully understand the customers' experiences
- c. How healthy is the culture? Are the objectives of the business on point? The culture must align, again, with the customer experience. If you want to evoke the emotion of trust, you must first ensure your employees trust their leaders.

Cultures must be:

1. Defined- must be thought over and be a deliberate act. Articulation and a written definition are key to securing comprehension.
2. Designed- infrastructure, soft and hard, must be constructed to enable culture. (desk formations, name tags, etc.)
3. Aligned-culture must support customer experience in every way
4. Signed-leaders must show the way. They need to signal their support by their own actions and attitudes
5. Mine-must be owned by the individual

This mapping strategy helps outline the good and bad practices that occur, which are necessary for a leader to support. Can be applied to an individual, team, etc.

- d. Culture and behaviors are contagious and most heavily influenced by the leader with most contact to customer service staff.
- e. The language used is a clear indication of the culture and helps to reinforce that culture, negatively or positively.
- f. The culture can vary from department to department as well...work for culture consistency.

Negative Cultures:

- | | |
|--------------------------|---|
| i. inside out culture | iv. Bureaucratic and process culture |
| ii. cost cutting culture | v. highly political culture |
| iii. blame culture | vi. Dictator culture |
| vii. they culture | viii. Win-lose- co wins, customer loses |

Positive Cultures:

- | | |
|-----------------------|-----------------------|
| i. outside in culture | ii. Empowered culture |
| iii. win-win | |

g. Empowerment- so often misused- instilling confidence and releasing peoples' potential is what it is...trust is necessary for this to work.

Commanding and controlling is easy, but it's letting go and letting people do their thing that's scary and often mishandled.

- 8. The customer experience is the embodiment of the brand
 - a. Intrinsically linked-even the best brand/product can't negate a bad encounter. It is key to know customers' brand perception, which essentially is a promise. Breaking that promise, or expectation will create a bad experience.

1. The promise is first made at the stage of expectation setting via ads and PR- they must align with the brand and convey the appropriate customer experience
2. Departments must interact and communicate the brand values. It is important marketing department and service people are on the same page.

9. Managing your customer experience pyramid

- a. Marketing, Support, Service and Sales all comprise pyramid or steps to building a great customer experience.
 - i. Customer experience – define it: that statement communicates your mission, values and vision: need to proceed through pyramid steps to complete it
 - ii. Elements- first step to defining the CE is breaking it down into elements: the physical (innovation, creativity, etc.) and emotional (trustworthy, friendly, etc.)
 - iii. Sub-elements-break those elements down further to manageable comprehension. Also, physical and emotional ex: trust-integrity.
 - iv. Standards-set aims, definitions of what you wish to attain, driven by the value customers’ place on them – when theory moves to action
 - v. Measures-external and internal, based on chosen sub-elements- cannot manage what you cannot measure.
 - vi. Targets- drive and are consistent with sub-element properties-specific, defined, measurable and totally objective
 - vii. Initiatives- ID actions that will help achieve targets- are they specifically aimed at improving the CE?

The importance of various elements will vary industry-to-industry and company-to-company.

- b. Additional factors that impact the importance-of-elements are:
 - i. Product and market maturity- if it’s new, its newness is important to some people whereas as it ages, its reputation and reliability become more important to consumers.
 - ii. Different products- diff. products evoke diff. emotions
 - iii. Customer segmentation- type of customer effects values--- younger users will be less concerned than older ones, with usability of new tech. for instance

10. Measuring your customer experience

- a. Customer satisfaction indexes- outside –in is key!
 - i. Most common- yet only gauge satisfaction- that’s the emotion they communicate, the level of their service as good enough, not great
 - ii. They’re trying to measure an emotion, satisfaction, yet most commonly use physical measures

- iii. These must be very professional looking and convey the idea the co. cares, and they're not simply conducting a routine survey- consider consumers' experience taking it and the perceptions it could generate.
 - iv. Give customers feedback on their feedback- thank them and explain what actions the co. is taking to improve based on their suggestions
 - b. Get an idea of what's important to customers, then build your measurement strategy based on their suggestions
 - i. Determine what the element and sub-element is and the standard (accuracy, trust, etc.)
 - ii. What's the importance to customers(ex. Delivery, accuracy)
 - iii. Process for measurement of that (sign for delivery) determine how to use and report this (graphs, etc.) what measures do they want to see?
 - iv. Feedback results and actions to customers (letters, etc.)
 - conduct review to est. is measure is still appropriate
 - v. Review measures- are you achieving your desired outcomes?
 - At each stage ask:
 - i. What current measure is being used
 - ii. Where would the new measure be most appropriately captured
 - iii. Which measures should be captured, and at which point to get greatest amount of data with most minimal effect on the CE
 - iv. What further measures would be appropriate and add value
 - vi. While it's easy to measure physical elements, emotional ones are far more difficult- since you can't make someone happy, they're the only ones you can do it, you can measure the employee behaviors in evoking that emotion
11. Targeting: driving behaviors that impact your customer experience.
- a. Too many companies do not modernize their targets- for instance percentage of calls answered (PCA) was an age-old standard that has lost some of its relevancy over time, as call quality not quantity is what really will make or break the CE.
 - b. Employees will find loopholes in targets and take the easiest path to achievement, not always the path most effective at creating a great CE- hence the importance to build targets from the outside-in!
 - i. You cannot swindle a customer's emotions that they cite during feedback.
 - c. Keep targets well aligned.
 - d. Targets can do more harm than good as employees are often likely to take advantage of them. For instance, rewarding high sales causes

salespeople to push products with no concern for finding the right product for the customer.

- e. Leadership and culture are key to implementing targets. There may not exist appropriate targets that will not potentially take away from the CE- don't use them, but can still use them as a measure.

12. Creating your customer experience strategy

- a. Get everyone on board –HR, IT, etc. must all have the ultimate goal of a building and delivering a great CE
- b. Once you have created that CE statement, identify the gaps in each area between the current CE and the desired
 - i. People program
 - a. Recruit people with CE competencies
 - b. Training on emotions
 - c. Assessment centers
 - ii. Systems program
 - a. Improve the systems
 - b. Implement the CRM system
 - iii. Marketing program
 - a. communicate the changes to the CE
 - iv. Organizational change program
 - a. look at restructuring the business
 - b. review and revamp current processes
 - v. Change management and communications program
 - a. deal with all aspects of change management
 - b. communicate the changes to your people
- c. Cost reduction- How improving systems can achieve this-the ROI
 - i. Reduce or eliminate the cost of failure- call systems more efficient reducing lost calls, wait time and hence, amount of angry customers
 - ii. Eradicate need to employ people whose sole purpose is solving preventable problems
 - iii. Repeat visits- get it done once
 - iv. Reduce overlaps in moments of contact
 - v. Consolidate activities
 - vi. Transactional costs- id which contact points are most cost effective
 - vii. Customer value-is your CE effective and profit making?
 - viii. Stop it- get rid of initiatives that do not help improve the CE
- d. Driving Improved Customer Experience (DICE) an ongoing, virtuous process- review monthly with larger reviews every 6 months or as necessary.
 - i. Evaluate customer experience needs- use all potential data sources, info and feedback to id and review Customers' experience requirements.

- ii. Assess internal readiness-define and review state of readiness of capabilities including: resources, skill sets, volume, productivity, production and funds, also people skills, culture, leadership and ability to adapt.
 - iii. Develop statement and strategy-build a business case and define/review pyramid steps
 - iv. Implement elements & sub-elements- move strategy into action and implement measurement tactics
 - v. Monitor against desired results-employee feedback, external reports, internal measures, customer satisfaction index, market research, customer comments & complaints, lost customers.
 - vi. Gather measures and source other feedback-cast net wide, review market data, benchmark studies, market research, best practices from other industries and focus groups.
13. The future of customer experience
- a. Speed is of the essence!
 - b. Future CE is all about assaulting the senses
 - c. Aim to sell memories, sell them by telling a story, one that evokes vivid, and DEEP emotion.
 - d. The depth of the emotion evoked is what will be the differentiator in the future.

3. Customer Satisfaction is Worthless, Customer Loyalty is Priceless by Jeffrey Gitomer
ISBN:188516730X

Gitomer interlaces real world facts and personal experiences with his tried and true fundamentals of superior customer service. Focusing on the ultimate objective of loyalty, consistent implementation of his attitude adjustments and communication methods ensure realized and value-driven results.

The real-world application and straightforward structure of this piece solidify Gitomer's expertise as a requirement for the CLS.

Book Outline

Part I- Customers, the Source of Your Paycheck

1. Introducing the most important person in the world: You
 - You are the company, you determine the quality of service
2. Introducing the customer
 - Customers now are: smarter, leaner, price conscious, lower morale, hit on more by competitors, more demanding, less forgiving and loyal, harder to satisfy.

- Satisfaction isn't enough: Loyalty is critical-OK versus GREAT
- Customers call because they need help- they also need:
 - Value
 - Communication
 - Attitude
 - Reliability
 - Tangibility
 - Assurance
 - Empathy
 - Exceptional service

Current challenges are:

- Understanding customers
- Being prepared to serve customers
- Helping an angry customer
- Asking customers for information
- Listening to customers
- Being responsible for your actions
- Living up to commitments
- Being memorable
- Surprising customers
- Striving to keep customers for life
- Getting unsolicited referrals from customers- regularly

3. The reality of service

- Satisfaction isn't enough---get feedback! Don't just ask if a customer is happy, ask why and how to enhance their experience
- It's not about right and wrong, it's about how you handle the problem
- Reasons for customer dissention:
 - Showing no genuine personal interest
 - Poor response
 - Unavailability (people, product)
 - Hard to do business or order
 - Unfriendly person on front line
 - Poor or rude collection practices
 - Over-promising
 - Inadequate capability to handle problem
 - Too eager to do more business-being pushy
 - Poor professional package or image
 - Dumb excuses about why you can't
 - Nickel and dime-ing
 - Poor product quality
 - Poor service delivery
 - Poor training

Organization misconceptions- lack of employee responsibility is a big issue

- Fundamental errors include poor examples from upper management
- Low training and budget
- Concentrating on competitive issues rather than advantages,
- Failure to start friendly

Part II

Principles, not policy- attitudes, customers' needs and their value- Say 'in order to be fair to everyone' instead of policy

- 12 Principles of Customer Service Success
 1. Your customer is your paycheck-the more you work for the customers' success the more you earn
 2. Your attitude-be positive! Create good perception
 3. Customers contact you because they need help- gain their trust, make them believe you can solve their problems.
 4. The value of a customer is 20x his annual sales volume- don't lose that business- take time to say thanks, spend more time on your customers than trying to attract new ones.
 5. A customer ready to repeat his purchase is a powerful business advantage
 - a. the quality of the relationship with your customers determines loyalty more than the price of your product.
 - b. Have you earned the right to the re-order? Ask why they reorder
 - c. Implement relationship-building strategies during re order sale.
 6. Customer satisfaction is worthless- not a measure or acceptable standard...only loyal is.
 7. When you're done speaking with a customer or the transaction is over, that's when they start talking
 - a. they might say something good about you or nothing at all. YOU determine what they say by your words, actions
 8. Word of mouth advertising is much more powerful than advertising
 - a. be the best you can be for yourself in order to be the best for your customers: constant attitude, discipline and self-education improvement.
 9. Your friendliness and willingness to help is in direct proportion to your success. –Consider what makes you feel good and makes you want to do business with someone
 10. Company policy is written in terms of the company, not the customer.
 - a. It only tells what you can't do for a customer, not what you can do...they never want hear the world policy!

11. Service is a feeling- don't give to other's that what you wouldn't want from someone

12. The secret to successful customer service is start with YES

- say 'the best way to get this done is' ...don't start with can't.

12.5 The customer's perception of good or bad service is the measure of your success or failure---their perception is all that matters-ask them, get feedback!

Act on, live by and become a master of principles, not policy!

- **Three big factors**

- *The get real factor*

- Put yourself in the customer's shoes and think about how you felt when you've had lousy service
- Drop the mask of professionalism for a minute and get real with the idea your helping another human being that needs help
- The person your serving could one day help you
- Don't be the angry stranger to ruin theirs and your day
- Focus your actions and put things in a realistic perspective
- See things the way they really are and view them in a new way

- *The Friendly Factor*

- Friendliness makes sales and generates repeat business
- Is a quality and has varying levels of competency
- Is a degree, and can vary in temperature

Companies must create a friendly environment

- develop best responses for repeat customer interactions and problem
- let people create consistently friendly welcomes
- Train people to be friendly and act friendly all the time.

- *The WOW factor-WOW is:*

Friendly

Courageous

Helpful

Memorable

Best

Long-term

Creatively Different

Manners

Funny

Understanding/Patient

Truthful

Confident in what you say and the way you act

Real

Be wow yourself

Compelling

Fast and to the Point

Able to get a smile or hear someone say

Enthusiastic

wow!

Knowledgeable

- What's the word out on you- word of mouth impact
 - Customers don't make up stories about you, YOU write them
 - Bad word of mouth travels faster than good
 - You get that good word out by creating memorable impressions and situations

7.5 advantages of great service:

1. It's free-costs nothing and can generate a fortune
2. It builds goodwill-consistent service creates and builds reputation
3. It builds customer loyalty-customers will look forward to doing business
4. it creates memorable experiences that'll be retold over and over
5. It makes your customers salespeople for your business-they're the most effective sales people as well
6. It leads to referred business
7. It makes it harder or impossible for competitors to steal customers away, even at a lower price

7.5 Creates clear distinction between to companies in same business

- The secret service success formula – self test
- If you talk stupid, they get angry- phrases, secret words, forbidden phrases
 - Start with Yes phrases: the best way to handle this...the fastest/easiest way to deal
 - Before they ask or gripe, say great, no problem, can do, etc.
 - Let them know you're on their side-"oh that's horrible,"

Use phrases like- 'you're in luck!'

Importance of Recovery trumps the apology-what to say

- Studies say it takes 12 good experiences to overcome 1 bad one
- if you own the problem, you own the customer and if you lose the problem you lose the customer, take proper responsibility.
- Say apologize instead of sorry- but place it in a plan of action, in terms of the customer, not yourself-their money, their situation, etc.
- Don't blame it on someone else, give excuses, cite policy
- Don't think apathetically, it'll come through in your actions
- Say thank you, thank you for telling me, etc. as soon as you receive a complaint.
- Take personal responsibility for following up
- Words aren't believable unless they are followed by actions- re-contacting the customer is the final step in a successful sorry
- Dealing with angry customers- add a personal touch and remedy the situation – right and wrong don't matter-perception does and keeping the customer happy is what counts.
 - Take responsibility-regardless of who is at fault and must deal with it!
 - Steps to taking responsibility and making them happy are:
 1. Tell them you understand how they feel
 2. Empathize with them-tell them when a similar thing happened to you-comfort them
 3. Listen all the way out- find out everything, ask questions to get all the info and find out what it will take to help
 4. Agree if with if at all possible-don't argue
 5. Take notes and confirm back everything that has been covered

6. Be an ambassador for your company-the them you'll personally handle it
7. Don't blame others or look for a scapegoat-admit you(the co.) were wrong and take responsibility for correcting it.
8. Don't pass the buck-do it yourself
9. Respond immediately
10. Find some common ground other than the problem- establish rapport
11. Use humor if possible-laughing put people at ease
12. Figure out, communicate and agree upon a solution-give them all the choices if possible
13. Make a follow-up call after the situation is resolved
14. Get a letter if you can-resolve the problem in a favorable and positive way strengthens respect and est. a solid base for a long-term relationship.
- 14.5 ask yourself what you have learned and what you can do to prevent that situation in the future- do you need to make changes?

Remember: Take it seriously-not personally!

- The customer knows exactly what they want/need but may have trouble communicating it effectively
- Think of yourself as a customer- what service do you expect
- They think you're the only customer you have-treat them that way
- They're human and have problems like you-relate
- They expect service at the flip of a switch
- It all boils down to you
- Their perception is reality
- How big a deal is it to try to get them what they want

Benchmarks and standards for performance – benchmarks create uniform, superior response to situations that occur daily in the workplace. They help raise level of service to the max and always maintain that level.

- Opportunities for benchmarking exist in:
 - The phone greeting
 - Receptionist greeting
 - Taking a message
 - The factory tour
 - The customer greeting
 - The initial response to a complaint
 - The customer good-bye
 - The customer follow-up after a sale
 - Word substitution

Part III- Real experiences- lessons from hotel, retail, airlines and more

- Lessons you didn't learn in school- positive attitudes, good better best-the difference, is it you?
 - A positive attitude is:

- Seeing the good in things, and how to turn the bad to good
- See the opportunity when an obstacle faces you
- To see things from the right side, not the wrong
- To treat others as you would like to be treated
- Encouraging others in need of support
- Forgiving others who have hurt or offended you
- Never letting the negative things get you for over 5 min
- To have something nice or funny to say
- To be internally happy
- To work at maintaining your attitude every day
- When you can add to end of each sentence... “all the time”

Six parts of the secret to personal achievement

1. Vision-identify one and put it in front of your goals-where do you see yourself
2. Love-what do you love to do, do the best
3. Best-if you find something you love, strive to be/do your best
4. Attitude-have the right one, it's not about the money
5. Personal-make goals about you, not 'it'.
6. Student-educate yourself as much as possible about a passion
 - **The landscape changes-how to adapt.** *The areas of business change:*
 - Product/service changes-usually newer and better-immediately learn the new features/changes and master them, figuring out the benefits to your customer
 - Policy-figure out how to use new procedures to your advantage-don't waste time fighting it
 - Price-stop talking price, talk value
 - Market conditions-work harder to expand customer base, network to find more demand
 - Competition-find out why they are and make any necessary changes to ensure you have the upper hand
 - Customer-determine how it affects you-aka-new person, help them understand the product and orient them to its value
 - Company-understand and try to harmonize culture shift-don't fight it, be proactive toward acceptance
 - Pay-look beyond dollar figure and toward long term success potential
 - Staff- turnover, layoffs- determine what it means for you
 - Personal growth-leave personal problems at home-maintain focus and pursuit of goals

Sometimes you cannot control change that affects you and must work hard to understand them, build an attitude of acceptance and see it as a challenge to learn and adapt.

People fear new in the work place due to:

Fear of the unknown, loss of security, poor attitude toward growth, lack of self-confidence that they can adapt, lack of desire or personal motivation to change.

10.5 ways to adapt to change

1. Accept change as a part of life- don't fight it, give it a chance
2. Keep change in perspective- it's not the end of the world-how can it be good
3. Look for new opportunities to succeed
4. Take note of all the bad things that could possibly happen-plan to deal
5. Take note of all the good that can come
6. Discuss your concerns with others who can help
7. Don't 'woe is me' it- help others worse off
8. Form a team to figure out possible outcomes-explore all possible good
9. Keep your attitude level and reinforcement at an all time high
10. Goal three things that will make change at work and make an action plan
- 10.5 Remember you're the greatest- new chance to be great, do it!
 - Loyalty lessons from the real world-converting customers from satisfied to loyal, making and documenting your success stories
 - Loyalty is built over time- it cannot happen in a day
 - Be unusual where usual is expected-WOW service
 - Help them in their business
 - Give them valuable information-answers!
 - Give proactive service-call them about new item, etc.
 - Service way beyond the sale-usage tips, etc.
 - Give the best service they've ever had
 - Give friendly service-make them love doing business
 - Answer the phone (recording) and help in a memorable way
 - Deliver an ad specialty so they'll show others (ad on a mug)
 - Going beyond the expected-waive delivery fee, have it arrive quicker than expected
 - Be fun, unusual, creative and poignant-be human!
 - Loyalty-the final frontier- how to asses your business and test your staff

4. How to Talk to Customers: Create a Great Impression Every Time With Magic by Diane Berenbaum and Tom Larkin. ISBN: 9780787987527

Focusing on **Making A Great Impression on the Customer, (MAGIC)**, Berenbaum and Larkin explicitly outline how to deliver first-rate service and optimally adjust attitudes and behaviors. This book details how to deal with any customer service scenario with the utmost effectiveness and relationship-building prowess.

The MAGIC book is an important study material for the CLS program as it pieces together the broad spectrum of human emotions and behaviors that are weaved into to the fabric of customer service practices.

Book Outline

Part I- The essence of MAGIC-What does Magic really mean- Makes a Great

Impression on the Customer

More than positive interactions- it's all about managing perception
Communication quality depends on perception- self awareness is critical
Must make a choice to manage that perception

- a. Making quality interactions- communicate effectively
 - i. Use a collaborative approach-remain open and receptive
 - ii. Don't sugarcoat, just focus on the goal
 - iii. Know what sets you off- identify your hot buttons and manage your responses with angry customers
- b. Practical value- integrity, service, etc. all comprise it

Benefits of Magic

- c. MAGIC culture- employees must choose this...benefit to co and customer- shows you care- indifference drives most customers away.
- d. Creating and securing loyalty
- e. Customers satisfied with value of the experience and will happily pay the price you set
- f. Increased referrals and greater market share

Part II- MAGIC- it's your choice

Releasing your MAGIC mindset- knowing you can communicate effectively will allow you to do so

- a. Exuding magic from within and creating a responsive environment
 - i. Tone of voice- smiling while talking on the phone
 - ii. Listening skills
 - iii. Body language
- b. Dealing with difficult customers using MAGIC
 - i. The customer isn't always right, but you need to reach a middle ground regardless to keep them

Creating climate for MAGIC relationships

- c. Taking the lead and setting the tone of your communications
- d. Focus on the variables you CAN control
- e. Recognizing what you can influence and what influences you, then choosing your response and actions accordingly- you always have that choice.

Part III- Build Magic relationships

First steps-

- a. Making the connection and building the relationship
 - i. Managing perception and first impressions- what to say and ask, how to read your customer
- b. Acting professionally and expressing confidence
 - i. Use welcoming words
 - ii. Tone and pace- keep it steady, don't sound over enthusiastic

Connecting with empathy by:

- c. Choosing the right words- explain that you appreciate, understand, their issue and realize they're upset and why
- d. Using right tone of voice-sound sincere

- e. Empathy helps shorten interaction and make it more pleasant
 - f. Building confidence-using names
 - i. If they give you first and last, refer to them by first or ask if you can
 - ii. If don't give you name, refrain, or use last name only
 - iii. Don't use sir or ma'am, this isn't liked by many
 - g. Offering help- help defined and delivered – tell them you will help them and how, using a positive tone
 - h. Don't just say help, too vague,-tell them exactly what you can and plan to do as to ensure there's no over promising.
 - i. Listening and asking –listen to issue, and ask permission to get more Information from them
 - j. Inform and clarify what will ensue- be as specific and realistic as possible
- examples of magic and tragic words and phrases
- k. Words/phrases are MAGIC because they are:
 - i. Personal
 - ii. specific- take ownership
 - a. I'll call ASAP vs. at 3 pm
 - b. Clarify any jargon or acronyms
 - iii. Empathetic

Part IV- Express magic accountability

voicemail-clear, courteous and concise-appear genuinely interested

- a. Saves valuable time if give right info- ex. Be back in the office –day and time. Be specific! And if applicable, refer substitute person to reach
- b. Listen to your greeting- does it sound upbeat

Listening- the four levels

- a. Focus on facts and details
- b. Rapport building-ask questions
- c. Empathy-understanding, no judgment
- d. Deepest- intuition, uncover personal meaning

Get to the heart-what's the catch point- shorter calls= less stress

- c. Asking the right questions- not just what it is, but WHY it's significant to that customer
- d. Rephrase and repeat if necessary- repeat any #'s or contact info
- e. Transferring a call with magic lead with a benefit-transfer- "*in order to better help you...*"
 - i. Ask permission to transfer and tell why
 - ii. Give name of person they'll be speaking to and their #
 - iii. Tell colleague the customer's name, info, etc. prior
- d. Holds- if have to put on hold, tell them why and for about how long

moving on- inform and clarify what you will do

- f. Being proactive and offering solutions- offer option before they ask in order to give yourself the upper hand and ensure they don't ask things you cannot deliver
- g. Make them personal and specific
- h. Set a deadline-set as specific a time as possible before they ask when it'll be done/ready
- i. Educate the customer-helping them understand everything gives them added sense of value and makes you the subject 'expert'
 - i. Timeframes and processes
 - ii. Range of products and services
 - iii. Options or alternatives that might be of benefit the them
- j. Summarize the next step and reach an agreement
 - i. Repeat in order to ensure they understand all aspects and ensure them you will take those steps
 - ii. Get an agreement on the next step- make sure they're clear on it and are positive about it
 - iii. Ask if there's anything else that needs handling

Close with the relationship in mind

- k. Make a last offer of help-ask questions but don't sound like you feel obligated to do so
- l. Magic phrases- use their name, be upbeat
- m. Staying with customer to the end and following through- don't hang up first
 - i. Organize your notes and the process of solving the issue after and set your game plan
 - ii. Keep the caller informed of any problems or the status of the issue as you proceed

- iii. Remain proactive and look for additional opportunities to provide service and go the extra mile

Assessing calls with magic –practice exercises and tips

- n. Outgoing calls
 - i. Gather all necessary info
 - ii. Bear in mind other party's communication style-do they like to chat or get right down to business
 - iii. Know your questions and anticipate theirs

Handling complaints and difficult situations

- o. Complainers may be your most future loyal customers
 - i. Those that actually take time to complain care and can be converted into loyal customers
- p. Hot buttons, changing your responses-manage your own emotional response to best handle theirs-know what sets you off
- q. Diffusing irate and abusive callers
 - i. Don't take it personally
 - ii. Watch the tone of your voice
 - iii. Use their name and explain what you can do
 - iv. If abuse continues, explain you will not proceed if they behave in that manner--- there is a limit
 - v. Be rational!
 - vi. If they're too upset or emotional suggest they call back when in a better state
 - vii. If they ramble on, politely interrupt to get back on track and summarize and get to the point as much as you can
- r. Putting choices into practice
 - i. Acknowledge that they're upset
 - ii. Use their name ASAP-establish a personal tie
 - iii. Make it clear you intend to help them
- s. Delivering bad news
 - i. Empathize, deliver the bad news, end on a positive note such as with additional empathy or help

Part V- The world of MAGIC

A culture of exceptional service- how to build your service culture – community of leaders- all employees embrace idea of service

Happy employees lead to happy customers, resulting in a great culture

- a. Assessment
 - i. Current culture
 - ii. Customer perception of service
 - iii. Quality of service interaction
- b. Alignment
 - i. Align all mission and values to service initiative
- c. Training and development

- i. Figure out who needs training
- ii. Make sure everyone is on same page
- iii. Which skills need revamping and how
- iv. How will you tailor training to specific roles
- v. What's the timing
- d. Reinforcement
 - i. Rewards and recognition important
 - ii. Leadership-modeling
 - iii. Consistent coaching and feedback

The magic coach- being a good coach to others has huge impact

- e. An attitude is what qualifies a coach-guiding and mentoring others to bring out their full potential while contributing to goals of the organization
- f. Have respect for the person and holds them accountable for results
- g. Establishing coaching relationships is a process that is comprise of a purpose, perceptions, possibilities and a pact or agreement as to the results.

Magic face-face- you are the message!

- h. Visual impressions are created by:
 - i. Facial expressions
 - ii. Eye contact-keep eyes focused but don't stare
 - iii. Gestures and movements- be wary of habits
 - iv. Posture
 - v. Proximity
 - vi. Appearance
- b. The first few seconds of a meeting are crucial- beware:
 - i. Your words-be welcoming
 - ii. Tone- keep it upbeat
 - iii. Pace-keep it moderate
 - iv. Body language- pleasant facial expression, posture, make eye

contact, offer firm handshake when appropriate.

Part VI.

The magic of relationship selling

- i. Focusing on the customer- all attention should be paid to them- focus on their needs and how to meet them
 - i. Use creativity and take initiative to build that relationship
 - ii. Identify the challenges they face begin to position solutions
 - iii. Think of their long-term needs
 - iv. Respond consistently, professionally, expediently and accurately
 - v. Act with integrity!
- j. Dealing with objectives- rethink them as requests for more info and as an opportunity to continue to the discussion
 - i. Clarify it, acknowledge it, clarify the redirect and provide more details, prove the supporting information
- k. Following up- shows you care and value the relationship

- i. The simplest actions can go for, like a handwritten note
- I. Collections and default negotiations
 - i. Don't use the 'or else' approach-threats don't help build relationships
 - ii. Your focusing on issue, not the customer and using demanding, unwelcoming tone
 - iii. Be cooperative-focus on information concerning the context and content of the situation...test their understanding instead of making demands
 - iv. Be prepared to negotiate- good customer service is finding solutions
 - 1. Get all the info-including background, history, etc.
 - 2. Set the best possible outcome for you along with your minimum acceptance...use those parameters
 - 3. When call, be clear and specific but with a positive tone.
 - m. Negotiating tactics:
 - i. Listen actively for win-win solutions- get the whole story
 - ii. Get to the catch point, paraphrase if need to be uncover more needs and clarify information.
 - iii. Empathize-letting them know you care about them and are willing to work with them builds trust.
 - iv. Present benefits- get them to see if from your perspective
 - v. Handle objectives and excuses- don't argue, rationalize and be sure to be firm and enforce rules without getting angry
 - vi. Let them make the first move
 - 1. You know your comfort level already, uncover theirs

VI. Exam Modules and Corresponding Key Words

Module 1- Customer Service Overview

- Competitive advantage
- Brand
- Differentiation
- Customer experience (CE)
- The physical CE
- The emotional CE
- Expectations
- Word of mouth
- Embodying the brand
- Commoditization
- Call centers
- Product
- Perception
- Brand promise

Module 2 - Customer Loyalty

- Loyalty
- Trust
- Transparency
- CRM –Customer Relationship Management
- Tangibles
- Responsiveness
- Reliability
- Reassurance
- Reassurance
- Internal customers

Module 3-The Customer

- Stages of the customer experience
- Attitude
- Motivators
- Closed ended vs. opened-ended questions
- Asking questions
- Emotional intelligence
- Motivations
- The catch point
- Consistency
- Standards
- Initiatives

Module 4-Problem Solving

- Emotional awareness
- Empathy
- Business objectives
- Benchmarking
- Internal communication
- Rule breaking-types of rules
- Measures
- Targets
- Satisfaction
- Promises
- Taking responsibility
- Apologies
- Recovery

Module 5- Organization and Culture

- Culture
- Empowerment
- Operations
- Awareness

- Overlaps
- Transactional costs
- Ownership
- Involvement
- Consistency
- Inside-out culture
- Outside-in culture
- Defined Culture
- Aligned culture
- Signed culture
- Designed Culture
- Leadership
- Multi-channels of communication

Module 6- Effective Communication

- Greetings
- First impressions
- Visual impressions
- Accountability
- Non-verbal communication
- Listening
- Trigger words
- Rapport building
- Transferring calls
- Satisfactory
- Policy
- Rules
- Voice tone and pace
- Body language
- Sympathy

VII. Sample Exam Questions

1. Which one of the following is NOT a reason for current poor customer service?
 - a. No written principles
 - b. Infrequent employee training
 - c. The goal is to satisfy customers
 - d. Fierce competition

Answer: D- Customer service is how companies gain the edge over that fierce competition, it isn't a hindrance but a necessary reality that exceptional customer service is critical

2. The key Customer Experience Differentiator is:

- a. Price
- b. Features
- c. Feelings
- d. Quality

Answer: C Feelings: Emotion is what comprises an experience and differentiates it from the classic components of a customer's purchase.

3. One of the major evaluations of customer service is responsiveness. An example of responsive service that goes above and beyond to provide the ultimate experience is:

- a. A short call queue
- b. Asking the customer their time needs and then agreeing to and delivering on that request.
- c. Giving the customer a time window for product/ service delivery, aka. 'ready next week...' in order to not over promise and under deliver.
- d. Providing a comfortable waiting area with beverages, magazines, etc.

A. B – Determining the customers' specific needs is a critical in delivering the best of service. Instead of giving them your timeline, work as best you can (without under promising) around their schedule. The more specific the time, the better... widows of time are frustrating, even if you have to make it a little longer, it's best to be as exact as possible.

4. Which of the following is NOT a major evaluation of exceptional customer service?

- a. Reliability
- b. Assurance
- c. Satisfaction
- d. Tangibles

Answer: C Satisfaction is just that...it does not denote loyalty, the ultimate result of exceptional customer service. Just because a customer is satisfied, doesn't guarantee they'll continue to be a customer.

5. One of the most common reasons why a customer stops doing business with a company is:

- a. Price or other relevant costs
- b. Company representative's indifference
- c. Relationship with a sales person
- d. Circumstance such as convenience or relocation.

Answer: b- Indifference- apathy is almost worse than outright rudeness or insult. As Berenbaum and Larkin point out, being angry or rude to a customer, although entirely negative and harmful, at least takes effort. Total apathy and zero effort is the worst offender, occurs the most frequent and is what drives away the most business.

6. Often overlooked, competitive advantages aren't the most obvious. An example of a clothing retailer's would be:

- a. Best value
- b. The most prevalent advertising
- c. Celebrity endorsements and expert accolades
- d. A non-expiring return policy

Answer D: While importance of the other factors certainly exists, it's the extras that add to the experience for a customer, such as the ability to return a good whenever. The feeling of security and concern the shopper has as a result of that term will carry them toward the loyalty level.

7. What is the fundamental aspect of great customer experiences that result in long-term competitive advantage?

- a. Emotional connection
- b. Proven reliability
- c. Actualized value
- d. Ultimate convenience

Answer: A- the emotional aspect is what reigns-in repeat purchasers--- all the other elements can be sought elsewhere, however, a feel-good interaction will steer a customer back above all else.

8. The value of retaining existing customers is undeniable. According to the Technical Assistance Research Programs, Inc (TARP), At least how much more does it cost to obtain a new customer than to keep a current one?

- A. 5 times as much
- B. Double the amount
- C. Up to 2 percent more depending on advertising quality
- D. 10 times as much

Answer: A, it costs at least 5 times as much to win new customers that to maintain current customers, and in certain industries the ratio can be as high as 21.

VII. Frequently Asked Questions (FAQ)

See below for our FAQ and please send in any additional questions you may have to us directly at Team@CustomerServiceCoalition.com. Below are some of the frequently asked questions regarding the CLS:

Question *What are the major advantages to taking the Customer Loyalty Specialist Program?*

The CLS not only provides a thorough education on numerous aspects of the customer service profession, but also will continue to prove itself as a major asset in any career pursuit. The major advantages include:

- **Building a solid framework** of knowledge on customer service as both a personal career, and about its role within the macro business spectrum.
- **Enhance communication** and interpersonal skills that will translate to all arenas of your life, both in the office and outside the workplace.
- **Profit** from the convenience and flexibility inherent throughout the entire Customer Loyalty Specialist (CLS) certification process. The completely self-paced study format allows you to study wherever you want, while the entire exam is administered online and may be completed from your place of home or work.
- **Further cultivate** your interests and hone your strengths in particular areas within the customer service area, better enabling your search for the right job and career track for you.
- **Give your resume** an edge by proving your qualifications and credibility to potential employers with a professional industry certification.
- More online at: <http://customerservicecertification.com/Benefits.html>

Question *What does the certification mean?*

The certification legitimizes your expertise in the area of customer service and will bolster your resume and job searching prospects by adding credibility to your professional value and specialized knowledge.

Question *Are there any requirements for signing up for the program?*

No, there are no prerequisites for the program, just sign up ready and willing to learn more about customer service best practices.

Question *Can I use the program to train employees?*

Absolutely, organizational training is encouraged and we are increasing our offerings of institution based testing due to demands. Please see our registration page for discounts offered to corporations and small teams of professionals.

Question *As an employer, why should I hire someone with the CLS certification?*

Hiring someone with a proven comprehension of essential practices and proven ability to implement them in any given service situation is a huge advantage for your organization. In addition to cutting down on costly and time consuming training, you have the added reassuring of placing a professional recognized and qualified representative on your front lines.

Question *What must I score on the exam to pass and receive my certification?*

You must score at least 80% in order to complete the certification program.

Question *How soon can I expect to receive my results?*

4 weeks from test date you will obtain your scores.

Question *If I fail the exam, can I retake the exam and, if so, how much does it cost to retake?*

You are allowed to retake the exam after a 3-month waiting period and the fee is \$99.

Question *When Can I Take the Exam?*

The CLS Program is offered on a revolving basis to 100 participants per session, and you may start and complete the program on any timeframe you wish. Once you enroll you can immediately select your examination date or wait until you feel ready for the

examination and then email us with your preferred testing date.

The dates you may choose from include January 15th, April 15th, July 15th, or October 15th of each year. Most professionals take 2-4 months to prepare for this examination after they register for the program.

Question *How long is the exam?*

You have 2 hours to complete the exam, which is feasibly finished in less time.

Question *I live outside the US, can I still earn this certification?*

Absolutely, the exam and related materials are all available online in order to be ultimately accessible and convenient.

Question *Where do I sign up?*

You can sign up on this page of our website:

<http://customerservicecertification.com/Registration.html>

Question *Once I sign up am I able to obtain a refund if I change my mind?*

Absolutely, for 3 weeks from date of sign up there is a no questions asked, refund provided to anyone who changes their mind for any reason. Please notify us within three weeks in writing about this request.

Question *How many times can I take the Exam?*

As many times as needed to master the knowledge required to pass the exam.

Question *How much time does it take to study?*

While every person has different levels of reading comprehension and ability to retain information, making it impossible for a specific amount of time, reading all exam materials thoroughly and reviewing throughout the four month period in between the sign-up deadline and exam date should suffice.

Question *How much does the certification program cost?*

\$500, plus the cost of the books.

Question *What methods of payment are accepted for the program?*

We accept payment through internet-based credit card payments, fax-based credit card payments, check payment through traditional mail, Western Union or Paypal. To register now please see this page:

<http://customerservicecertification.com/Registration.html>

Question What materials are required for this exam and where do I get them?

There are four books necessary to prepare and you can find them at

<http://CustomerServiceBookstore.com>.

Question Is the cost of books included in the program fee?

No, but the books will cost between \$40 and \$70 total.

Thank you for your interest in the CLS Certification Program, to learn more please see <http://CustomerServiceCertification.com>.