



# Service Excellence:

**Lessons From  
the Field**

**By Steve Coscia**



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Service Excellence: Lessons From the Field  
First Edition

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For additional copies of this book, please  
contact Steve Coscia at:  
610-853-9836 or [steve@coscia.com](mailto:steve@coscia.com)

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*Special thanks to Robin Cameron whose  
editing skills made this book possible.*

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## **Introduction by Robin Cameron**

Become a successful service professional with happy, satisfied customers. This book based on real life lessons, helps you the customer service personnel get back to basics. By following a few simple ideas your job will become less stressful while maintaining and growing your customer service base. Filled with information useful to employees and management level personnel, this back to basics concept can be read through as a book and later used as a handy reference by using the handy bulleted reviews at the end of each chapter. Improving communication, problem solving secrets and hard work will entice the customer to be a player on your team.



## About the Author

# Steve Coscia

Steve Coscia helps companies make more money through greater customer retention, improved upselling and diminished on-the-job stress. He is a best selling author, columnist, 20-year customer service practitioner and customer service skills specialist.

An avid researcher of customer service trends, Steve conducted one of the industry's first studies of stress in the customer service environment. This survey revealed the causes of stress along with the most common manifestations of post-stress behavior. Steve has lectured at UC Berkeley and Penn State on the topics of customer loyalty and building business relationships.

A partial list of companies that use his customer service strategies includes Dell Computer, Lennox Industries, Motorola, Milwaukee Power Tools and Olive Garden Restaurants. Steve's [HVAC Customer Service Handbook](#) is curriculum at technical colleges from coast to coast. He also wrote an HVAC Instructor's Guide.

Steve's company is a Select Vendor for Bryant Heating and Cooling Systems.

To date, Steve has published more than 120 articles and he writes a monthly column for the Eastern PA Business Journal.

When he's not writing books or speaking, Steve likes being outdoors. He completed the Marine Corp Marathon and ran in the Philadelphia Distance Run five times.

## Chapter 1 – Overview

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### ***The Simple Stuff***

The news is out. Americans sense that we are, as a people, ruder than ever. Perhaps it is not really news at all. In fact, almost 80% of Americans believe that a lack of common courtesy is a serious problem for our society and that there is an urgent need to address it. This information was recently published by Public Agenda, a nonpartisan, nonprofit public opinion research and citizen education organization based in New York City. In their study entitled: “Aggravating Circumstances: A Status Report on Rudeness In America,” which included items of special interest to customer service professionals, and has broader implications regarding the effect of civilized behavior on society in general. I would suggest that those who have not noticed a gradual degradation of customer service are either in denial or do not get out much. Nevertheless, for one that is unaware, now and then, service stinks!

Not long after I read of the Public Agenda study, I had an experience in a retail establishment that clearly echoed its

findings. It happened while I was on vacation with my family on the eastern seaboard. Before heading to the beach one day, we went shopping for beach towels and sunscreen lotion. The cashier at the checkout counter was speaking on a cell phone while we waited for him to process our merchandise. In an instant we realized that his call was not business-related. He continued on in a lively conversation while at the same time scanning our items. He then took my credit card, processed the transaction, handed me a receipt, and then waved goodbye when he finished with us. This individual never paused in his exchange with the person on the other end of the conversation. More importantly, however, was his failure to even acknowledge my presence. (Whether he realized it or not, as a customer I was partly responsible for making his paychecks possible.) His behavior exposed an attitude and a belief that suspending his telephone call would not be of any consequence in the matter. His mind-set was clearly the dynamic behind his behavior.

As I left the store, I wondered if the cashier ever considered his actions inappropriate. Did his supervisor approve of his behavior? Were there minimum expectations to monitor?

After almost 20 years in customer service management, I have learned that it is necessary to set guidelines that would enable those reporting to me to perform in a manner which was consistent to the company culture.

One of the conclusions of the Public Agenda study focused on the behavior of service staff. It concluded that management must address *and* correct discourteous behavior in their employees. The report highlights two important data points: (1) 77% of Americans think that it is an all too common occurrence for salespeople to ignore the customer and (2) 46% of Americans have walked out of a retail establishment due to poor service. These customers may never return and will likely recount their bad service experience to others. Business owners who do

not set minimum expectations for employee's behavior run the risk of losing their customers as indicated by the study's findings.

Following are a few principles retail professionals can employ to help eliminate rude behavior:

- Make eye contact with every customer and greet them with a smile
- Wear clean clothes or a company-issued shirt and nametag
- Ask customers if they were able to find everything they intended to purchase
- Answer any questions posed by the customer
- Conclude each purchase by saying something like "Thank you for shopping with us today" or "Please come back."
- Keep the checkout counter neat and orderly
- Be sure to have a pen either on your person or nearby
- Prohibit any personal phone calls while serving customers

As you can see, it takes only elementary techniques to make a positive difference. Business owners have an overwhelming responsibility of navigating their organizations through a challenging and uncertain environment these days. If left unchecked, the "people problems" in organizations will cause you to squander your time and resources. This condition causes some managers to retreat rather than lead. Don't let this happen to you! Your employees look to you for leadership. If it is not forthcoming, they will behave in a manner that is most comfortable to them. Unfortunately, this might not be in the best interest of the company.

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Never negate the importance of the simple stuff. Orderliness, respect, and manners go a very long way. You may think that manners are too simple or old-fashioned to make a difference, but the proof is in the bottom-line. Try it and you will see that customers the world over respond to courtesy. And the best part, besides being the right thing to do, is that it doesn't add a penny to your bottom-line costs.

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## ***The Art of Telephone Therapy***

One of the most frustrating tasks I undertook during my twenty-plus years in customer service management was quantifying customer service behaviors. How and why were some behaviors better than others? Some things just *seemed* right in the world of customer service. I was not always able to prove why – that was just the way it was.

I urged agents in my employ for years to allow an upset customer to vent. My directive was based on what I had learned during years of handling challenging telephone calls. “Venting is therapeutic,” I would say. “Customers will feel better and be easier to handle when you give them time to work off some of their steam,” I added. In one call after another using this tactic, an upset customer would eventually be transformed into someone who was both accommodating and reasonable. How? By employing good, old-fashioned “telephone therapy.”

Ask a good telephone service professional if they view their position as similar to a counselor or therapist and the answer will be a resounding “Yes!” Anyone who has handled customer telephone calls for any length of time will understand that the role of service professional and therapist are analogous.

*Then it happened.*

The *Journal of the American Medical Association* recently published an elaborate study on the benefits of psychotherapy using the telephone. A psychiatrist at the Group Health Cooperative in Seattle reported that 80% of patients who received telephone therapy along with antidepressants indicated that their depression was "much improved" six months later, compared to 55% of those who received medication alone.

The inception of the telephone therapy study was in response to the increasing number of patients who failed to maintain their in-person counseling sessions long enough to detect any benefits. One out of every four patients attending in-person psychotherapy drop out after just one session; fully half would cease treatment altogether by the fourth session. A psychiatrist responded to this trend by contacting their patients by telephone to find out whether that method made it easier for them to continue with their treatment sessions. It did. The resulting telephone therapy study provided clinical proof about something that I have known intrinsically for decades.

What makes the telephone such a powerful therapy tool? I believe it is the amount of imaging that a good telephone voice is able to convey. 80% of what a telephone service professional conveys is in his or her tone of voice. The content or words comprise the remaining 20%. The tone of voice reveals much about an individual, their intent, and their demeanor.

### ***Five Key Attributes***

Customers hear five key attributes in the voice of a service professional. These attributes are vitally important as they encompass 80% of the telephone presentation. The following information is conveyed over the telephone when an astute service person speaks professionally:

- **Health** – A customer hears energy, enthusiasm, and involvement.

- **Assertiveness** – A customer hears diligence and tenacity towards the task at hand.
- **Intellect** – A customer hears whether or not a service professional is knowledgeable.
- **Empathy** – A customer hears whether or not a service professional really cares.
- **Competence** – A customer hears confidence and a “can do” attitude.

These five key attributes work in the favor of a service professional that knows how to leverage them to his or her advantage. They help to alleviate customer concerns and build trust and rapport. However, for the amateur service professional who does not know how to effectively use their tone of voice, the five key attributes look more like this:

- **Health** – A customer hears a lethargic and an uninvolved demeanor.
- **Assertiveness** – A customer hears sloppiness and a weak-willed effort.
- **Intellect** – A customer hears apprehension and uncertainty.
- **Empathy** – A customer hears a monotone voice and apathy.
- **Competence** – A customer hears a timid and “can’t do” attitude.

### ***Costs Involved***

Service organizations not leveraging their telephone therapy potential are costing their company money. These costs are revealed in the following practices:

**Lost time:** The service manager is forced to interrupt his or her duties in order to assist one of the poorly trained agents.

**Lost margins:** The company is forced to pay for expedited freight charges or make other accommodations to pacify a distressed customer.

**Lost productivity:** The agent is rendered ineffective and unproductive for the balance of the day due to having to absorb angry retorts from a customer who was unhappy with the inappropriate tone of the agent.

It is my firm conviction that the cost of ignorance is far greater than the cost of training. Improve the skills level at your service operations and maximize the ability of your agents to provide psychotherapy over the telephone.

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For those service professionals that deal with customers primarily over the phone, courtesy alone is not enough. What you project with your voice can have a powerful effect on the service interaction.

The next time that you sense that you are providing therapy to one of your customers, whether it is on the phone or in person, you are.

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**Have a question for Steve?**

**Call him: 610-853-9836**

**E-mail him: [steve@coscia.com](mailto:steve@coscia.com)**

**Steve is more than an expert -  
he is a practitioner! He can help.**

## Chapter 1 -- Reminders

- Make **eye contact** with every customer and greet them with a smile.
- **Wear** clean clothes or a company-issued shirt and nametag.
- **Ask** customers if they were able to find everything they intended to purchase.
- **Answer** any questions posed by the customer.
- Conclude each purchase by saying something like “**Thank you** for shopping with us today. Please come back.”
- Keep the checkout counter **neat and orderly**.
- Be sure to have a **pen** either on your person or nearby.
- Prohibit any **personal phone calls** while serving customers.
- Customers will **feel better** and be easier to handle when you give them time to work off some of their steam.
- 80% of what a telephone service professional conveys is in his or her **tone of voice**. The content or words comprise the remaining 20%. Customers listen for:
  - **Health** – A customer hears energy, enthusiasm, and involvement.
  - **Assertiveness** – A customer hears diligence and tenacity towards the task at hand.
  - **Intellect** – A customer hears whether or not a service professional is knowledgeable.
  - **Empathy** – A customer hears whether or not a service professional really cares.
  - **Competence** – A customer hears confidence and a “can do” attitude.

## Chapter 2 – The Foundation

As I discussed in Chapter 1, it is important that the customer hears health, assertiveness, empathy, intellect, and confidence in the customer service professional's voice. But let's look at the equation from the other side of the telephone line -- what does the customer service professional hear in the customer's voice, and more importantly, how does the customer service professional deal with what they hear?

### ***Back to Basics***

Amongst the variety of excellent customer service books, articles and studies, many concepts are put forth that are actually derived from a single innovative idea. Regardless of the idea's origin, there are numerous attempts to spin, embellish, and ultimately repackage the old or existing idea into something new or innovative. This practice of repackaging – be it an idea or a product – appears prominently in the music industry.

I have long held the opinion that most of the great rock and roll guitar work since the 1970s is the result of a single recording session that occurred on March 29, 1967. I suspect that the musician of note on that fateful day had little or no idea that his four minutes of playing time would have such a dramatic affect on the world of music. The song performed during the session is titled “Red House.” The guitar player was Jimi Hendrix. His fluid, visceral guitar licks during that recording session inspired an entire generation of musicians. The “Red House” guitar solo has been copied and embellished by subsequent musicians – famous and otherwise - who,

whether they knew it or not, owes a portion of their success to his vision.

In the business of customer service, perhaps the oldest and most profound idea is that of the Golden Rule: Treat others the way you wish to be treated. This adage has its origins in philosophical writings dating from antiquity. The Golden Rule has been spun into a myriad of maxims as it pervasively extends its influence throughout the world of business. The positive results are evident when applied within an organization that sets its focus on what is important - Customers.

Businesspeople consequently have been deluged with a litany of catch phrases, such as *Customer-Centric*, *Moment of Truth*, *Value-Based Service*, *Touch Point Strategy*, and the ever ubiquitous *Customer Care*. I must admit, that even I have taken the liberty of spinning the Golden Rule by penning the phrase, “We invite the type of behavior that we convey towards others.” This interpretation of the Golden Rule is directed towards service professionals who wish to minimize the stress of handling difficult customers by emphasizing the cause and effect consequences of communication.

My own experience as a customer service consultant has taught me that the Golden Rule is often not practiced and applied to internal customers within an organization. This is evident in the fact that I often observe managers treating subordinates in a manner contrary to the Golden Rule. This type of behavior is unacceptable, but it becomes even more offensive when, due to the bad example set by management, these same subordinates express similar behavior to customers. A company’s culture can easily be defined as being either good or bad depending on whether the Golden Rule is practiced among its internal customers.

The Golden Rule ought never to become a flavor-of-the-month type of service strategy. Instead, it must be applied every day.

Another observation I have made regarding the Golden Rule involves follow-up techniques. I am convinced that those companies who master the art of prompt and thorough follow up with their customers will continue to flourish. Most companies unfortunately do not have established follow up procedures in place. Treating others the way we wish to be treated, I believe, involves information. Service professionals require information to do their job, and a customer's need for information empowers them in turn. The duty of customers is to decide whether or not to make a purchase from an existing company or to choose another due to an inability to share information. The profound affect that great follow-up can have on the success of a company is consistent with the Golden Rule.

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I urge customer service professionals to get back to the basics of the Golden Rule. Perhaps this original idea is still the best: treat your customers the way you would like to be treated as a customer. However, there will be days when you follow the Golden Rule and use the best customer service techniques and yet you continue to get angry customers. This is part of the territory of the customer service professional's job. How you learn handle this personally will have a great effect on your overall job satisfaction.

### ***When the Job Begins to Get to You***

As a customer service professional, you might speak with scores of customers on a typical workday. Most are pleasant and a few can be difficult, but you tolerate it. A single demanding customer does not push you over the edge. However, each event is cumulative, like a drop of water, they become annoying and bothersome. Nothing you cannot handle, just aggravation. One customer blames you for damage resulting from a rough freight carrier. Another is frustrated about your service policy.



Still another customer keeps reciting the same complaint over and over again. Each phone call is like that drop of water in a bucket. Drip. Drip. Drip.

If you experience enough of these incidents, you will eventually have a bucket full of anger. The next challenging customer just might be the one who pushes your anger button and...SPLASH! The bucket spills over, resulting in an emotional torrent. Now you are seeking revenge!

There is no place for anger in customer service. Anger might seem appropriate as a way to even the score against a difficult customer. Yet, once you are able to compose yourself, you realize that you were in the wrong. But, by then, it is too late. You cannot take back angry words that were hurled like darts at your customer.

For an untrained or inexperienced service professional, anger and revenge fuel each other in a perpetual and escalating cycle. It is best never to get that this point in the first place. Emotional containment is an advantageous starting point. Allow yourself a few seconds to think, before responding during an unpleasant experience. Investing a moment or two in rational thought will spare you much angst and quite possibly save your company money by preventing a loss in productivity.

A service professional must take responsibility for his feelings. Customers do not make service professionals angry. Nor can they make them do or feel anything. A service professional chooses to become angry as a result of what someone else does. They should strive to modify their own behavior since they cannot change that of the customer. It is best to stop placing blame on others for your circumstances and, instead, take personal responsibility for your feelings. If there are problems to resolve, be proactive and fix them. Do not fix the blame.

The fight or flight response manifests itself in interesting ways in customer service. While it is not responsible to

fight with or flee from customers, the inability of a service professional to cope with unpleasant circumstances might lead to psychological attempts to do so. Psychological flight manifests itself as apathy or discourteous behavior. This type of conduct creates distance between an agent and their customer and is contrary to the practice of building closer relationships through empathy and genuine concern. Psychological fight might be exhibited as aggressive or retaliatory behavior, which is unacceptable in an industry where it is essential to use restraint rather than retaliation.

A meaningful event stands out in my life when I recall how I consciously started thinking rationally about anger and its affects on me. Late one afternoon I handled a telephone call from a very difficult customer. It was the last call of my workday and I left the office angry and frustrated. I kept replaying the incident in my head while driving home after work. I had blamed that customer for ruining my night. I was barely paying attention to my driving when I reached a sharp curve in the road. I lost control of my car but, fortunately, avoided a crash. The car spun 360-degrees twice before coming to a screeching halt.

As I sat staring at the dashboard, I knew I was wrong for allowing myself to become so angry that I began to think irrationally. The expression “circumstances don’t make a man, they reveal him” certainly rang true to me that evening. I had been exposed as a man who did not properly handle adversity.

The events of that night changed the way I think about and respond to anger. The memory of that night reminds me that I have a choice. These days, I choose to suspend my anger.

You will not improve as an individual or benefit in any way by considering yourself a victim who is at the mercy of the ebb and flow of life. Practice optimism and positive expectancy. You will be rewarded for learning how to

suspend your anger. How? Perhaps the biggest benefit is the additional creativity that you will experience. Did you ever notice that your best ideas come when you are the most relaxed? In the world of customer service, formulating creative solutions to customer problems is easiest when you remain calm. Life is so much more fulfilling when you remove anger.

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It can help when dealing with angry customers to try to imagine their situation: perhaps they have a sick child, an irresponsible employer or an overwhelming legal matter. Instead of feeling their anger or frustration wash over you and cloud your ability to do your job, raise your level of professionalism. It will make your job easier and may even help the customer improve their outlook. Raising your level of professionalism is not as difficult as you may think.

### ***Making Lemonade, With a Twist***

Every now and then, it helps to be reminded of good, old-fashioned professional service. Can you remember what this is? Among trade professionals, it is service provided by an individual who conveys knowledge and experience, asks the right questions, exceeds expectations, shows appreciation for your patronage, and genuinely enjoys their work. I recently had such an experience.

I was traveling home from a client meeting in a small Pennsylvania city on a hot Monday afternoon in mid-June when I decided to pull into a rest stop on the Northeast Extension of the Pennsylvania Turnpike. I returned to my car after a brief respite only to discover the engine failed to start. I tried the ignition numerous times without success. There I was, stranded at a rest stop, quite conceivably at the mercy of emergency roadside service. Faced with the reality of the situation, I was reconciled with the thought of a very long delay.

With jumper cables stored in the car, I took matters into my own hands. A passerby was more than willing to help me. We connected our batteries using the jumper cables after which I attempted to start my car. Unfortunately for me, we were unable to start the engine. I then asked an attendant at the rest stop gas station if there was an onsite mechanic who could assist me. He replied “No” but he did give me the telephone number of a local mechanic with a suggestion that I call him.

I contacted the telephone number given to me by the gas station attendant and spoke with the owner of the establishment. After describing the known symptoms to him, he asked me two very important qualifying questions: First, “How old is your car?” and, second, “Do you still have your original factory-installed battery?”

In response, I informed him that my car was four years old and that it still had its original factory-installed battery. With a clear sense of authority and certainty, he replied that, in his judgment, the car battery was most likely dead. He informed me that his tow truck driver was out on a call, but that he would place my name next on his service list. I provided him with my cell phone number and was instructed to wait until contacted by his driver.

My background as a service professional led me to conclude that this mechanic understood all about the telephone vocal image. He knew that a person in my situation, that is, someone in need of help, would be put at ease by someone knowledgeable in his field of expertise. His telephone vocal image conveyed a sense of confidence and reassurance. Although I did not know who this individual was, what he looked like, or what type of environment he worked in, based on his voice, I recognized that he was astute, alert, and methodical in his thinking and aware that each telephone call was a business opportunity.

I received a call on my cell phone a few minutes later from the tow truck driver, Ken, who introduced himself in

a very polite fashion. He said that he was on his way to pick up a new battery for my car and would then proceed to meet me at the rest stop. Ken asked me about the make, model, color, and location of my car in the parking lot. He asked good qualifying questions that would enable him to do his job. In ten short minutes, a large tow truck arrived. Ken emerged from the cab and again introduced himself to me. He was quite young, very polite, and eager to be of service. His overall demeanor conveyed a sense of respect and appreciation for putting my trust in him. Ken did everything possible to make me believe that my trust in him was well placed. Even though it was I who needed him and his services, Ken made me feel like it was he who needed me. What a concept! He made me, the customer, feel special.

I asked Ken a few questions as he retrieved his tool box and started replacing my old battery. His answers said much about his character. Ken was 22 years old and had been repairing automobiles for the past six years. He took pride in his work and it showed. He installed the new battery in just a few minutes. As he wrote up my sales receipt, Ken exceeded my expectations by declaring that he was only going to charge me for half the labor rate given that his services were required for such a brief period.

As I continued my trek south, I could not help but think how Ken and his boss turned a seemingly negative situation into a positive experience. Ken finds purpose in his work, he cares about people, and he is a specialist at his job – all the elements of someone with a future as a successful service professional.

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Customer service professionals deal with people from all over the globe, at all age levels and economic standings, and in all kinds of situations. In many ways, it is one of the most interesting jobs there are. It all depends on your outlook.

## Chapter 2 -- Reminders

- **We can't really make customers do anything.** In the world of customer service, the customer's behavior is outside of our sphere of control. The only behavior that a service professional can control is their own.
  - A **smile** is not just a reflection of our feelings, but that it can also change the way we feel.
  - **Treat others the way you wish to be treated** – every day.
  - Master the art of **prompt and thorough follow up**. Give your customers the information that empowers them to make informed decisions.
  - It is best never to get to the point of anger in the first place. **Emotional containment** is an advantageous starting point. Allow yourself a few seconds to think prior to responding during each unpleasant experience.
  - In a difficult customer service situation, **do not fix the blame**.
  - **Practice optimism and positive expectancy.**
  - **Take pride in your work.**
  - **Exceed your customer's expectations.**
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## Chapter 3 –Improving Communication

Every customer service professional has their moment. The moment when everything falls perfectly into place--the customer is thrilled with your handling and resolving their problem and maybe they even call your boss to say how wonderfully you did your job. It is a moment for you to bask. And you say to yourself, “Wouldn’t it be great if every customer interaction went as well as this one?” The good news is yes, you can repeat great service on a regular basis.

Great customer service is based on many attributes: attitude, perseverance, resilience, problem solving and excellent communication skills. Communication skills underlie many of the other skills that you need to be a great service provider. A great attitude and perseverance cannot make up for a bungled communication about an order. Fortunately, communication skills can be easily learned and practiced, and the results are almost always immediate. Great communication starts the very first moment that we have contact with the customer. As a matter of fact, great communication sometimes begins even *before* we speak a word.

### ***First Impressions***

First impressions are big. Regardless of whether a company provides fast food, business consulting or high-tech manufacturing equipment – the customer’s perception of an organization is emblazoned in their mind within the first few seconds of their encounter. This reality became more apparent to me recently while my wife and I sought a contractor to replace a concrete patio in our backyard. Our search began with a list of five local concrete contractors. I phoned all five contractors within a 24-hour

time period. Since my phone calls were made during the daytime, when most contractors are out working, I recorded voice mail messages. Within the next 24 hours, only three contractors had returned my phone call and their lead-time message was similar – all three contractors were booked for the next six to eight weeks. The remaining two contractors didn't call back. To keep from telling you a long story, I will focus on the three contractors who followed up with me.

The first contractor phoned at 10:00pm while I was asleep. My wife answered the phone. The contractor was surprised to learn that I was already asleep and my wife clearly heard his sigh of disappointment or what is technically known as “the loud exhale over the phone.” The next morning, my wife replayed in great detail the contractor's sigh as she handed me a note with this contractor's name and his cell phone number. My subsequent phone call to this contractor confirmed his poor telephone demeanor as his audible sighs and grunts didn't build my confidence in his ability. Perhaps the greatest flaw was his disregard for mutual closure at the end of our phone call. The mutual closure is extremely important because it establishes a mutual understanding of what is supposed to happen next. In this case, our loud sighing friend left me with a vague understanding of whether he would be able to visit my home sometime during that week. Needless to say, the loud sigher left me rather unimpressed.

My personal encounter with the second contractor began OK and then things quickly deteriorated. His amiable and reassuring tone of voice put me at ease. His mutual closure skills were more highly developed as he made and kept his appointment to visit my home to size up the work involved and provide an estimate. But on that day while I showed him the old patio, the contractor excused himself for a minute to return to his truck so he could retrieve his clipboard and pen. As he began taking notes, he then remembered that he needed his measuring tape that



resulted in a second trip back to his truck. While, these two brief interruptions might appear insignificant, I quickly began to feel a sense of unease about his scatterbrained and quirky behavior. It didn't do much to build my confidence in his organizational ability or lack thereof. After his data collection and measurement, he prepared to depart at which time I asked the scatterbrain for a business card. Unfortunately, my request resulted in another trip to his truck so that he could retrieve a business card. The scatterbrain seemed like a nice guy, but his disorganized manner left me ill at ease.

The third contractor must have learned something about the importance of the first impression. His polite and efficient telephone follow-up matched his in-person demeanor. Most striking was what appeared to be a standard operating procedure which he practiced after his truck pulled up to my home. As I watched from my living room window, I observed the third contractor retrieve small, index-card sized paper from his truck's sun visor. This paper must have been a checklist. In a methodical and deliberate manner, he accumulated his required tools: his clipboard, measuring tape, calculator, business cards and pen. He even looked at himself in a mirror to ensure that he looked presentable. My encounter with the process-based contractor was the best of the three. Perhaps, the most remarkable aspect of my encounters was that the process-based contractor's price quote was not the least. However, his services were perceived to be the best and based on his attention to detail he won. In any home-improvement buying decision, price is only a small factor when customers consider the lasting impression a contractor will have on a beautiful home.

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As you become aware of how your initial contact with the customer sets the stage for the service interaction, you will begin to tune in to how details really matter in the service

interaction. Details matter so much, in fact, that they are often the underlying *cause* for calls from irate customers.

## ***Details, Details, Details***

Establishing and keeping good business relationships often depends on the ability of the customer service professional to discern, capture and qualify details. Big business deals can go sour due to a tiny detail that might have been incorrect or omitted.

While speaking recently to a local business association, I discussed the phenomenon of distinguishing similar sounding consonants over the telephone. I explained, for example, how a telephone did not accurately transmit the subtle differences between the letters “S” and “F”. One of the attendees immediately jumped out of his seat and shouted “Now I know why!” The room in which we were meeting fell silent as everyone’s attention was drawn to him. I halted my presentation and asked this excitable attendee to share his epiphany with the group.

He related an event from the previous week in which his administrative assistant had made an appointment for him to meet with a prospect on the sixth of that month. However, when he arrived at the appointment, the prospect was obviously upset, believing their appointment was to be on the fifth. This attendee shared with us his embarrassment and regret for showing up a day late due to a minor detail. The misunderstanding had harmed their business relationship.

The words “fifth” and “sixth” have a subtle and audible difference, depending on how they are pronounced. These two words sound quite similar when speaking to someone on the telephone. A professional who regularly employs the telephone for business purposes should know that similar sounding consonants be qualified by asking “Is that “fifth” as in five or “sixth” as in six?” This extra effort ensures the accuracy of details.

Other similar sounding consonants include the letters “B” and “D”, “N” and “M”, and “T” and “P”. Investing a few seconds to ask, “Is that “N” as in Nancy or “M” as in Mary?” can help avert future problems.

My experience in interpersonal communication is that some people are either afraid or too embarrassed to ask qualifying questions. Some risk having wrong information rather than being proactive by asking a simple question. It takes courage for many to ask questions.

The basics of good communication between two people include the mutual understanding that talking is *not* communicating. The best communicators are people who have learned that good communication happens when someone speaks and another person hears, qualifies, and then understands what was spoken. Never underestimate the power of qualification, especially when it comes to capturing details.

Paying attention to details also requires that a customer service professional take the time to note the particulars in writing. Writing down key facts about a customer’s name, location, order quantity, shipping details, due date, or part number are all essential pieces of information not to be left to memory. A customer service professional should always have something to write with and something to write on.

At a minimum, four key questions must be answered during every customer service encounter. The easiest way to recall these key questions is to remember four simple “W” words: Who, When, Why and What. Here is the methodology:

**Who** – The person, his or her title, company, department and location.

**When** – Initial contact date and time, due date, shipping date, and follow up date.

**Why** – Why did he or she call us? The purpose for the customer’s call.

**What** – What do they want from us? What is their expectation?

Capturing details using this approach will enable a customer service professional to be more effective. Getting the information right the first time reduces the need for follow up, rework, returns and strained business relationships. Even in this age of computers, laptops, and PDAs, from time to time pen and paper still work best.

I learned a number of years ago that the person with the best notes always wins. The discipline of concentrating on and qualifying and capturing essential details will pay off with success in business. World-class customer service organizations have learned to be courageous listeners. This means they dare to ask questions when they are uncertain of their facts or believe they have incomplete information. It’s as simple as that.



Putting yourself into the customer’s shoes by thinking and asking the “W” questions will help keep the service interaction focused and assist the customer service professional in gathering the details necessary for a correct order. But what happens when you give more information to the customer than what they were seeking?

If you have ever tried to reconfigure your computer for a new connectivity, you know what I mean when I say that there is such a thing as too much information. Sometimes details can get in the way of what it is we need to know.

### ***Editorializing: Less is More***

Edward is a customer service representative for Action Heating and Air Conditioning Company. It’s Tuesday and Edward has just received a verbal dressing-down. Edward had taken a telephone call from one of his customers who

phoned to demand to know the whereabouts of his order. “You said it would be here on Tuesday,” roared the caller. “Today is Tuesday and I want my order.” Edward responds by explaining that he did not say the order would arrive on Tuesday, but, rather, “I said that my distributor would ship it on Friday. I would probably receive it on Monday and then I would ship it to you on Tuesday.” Edward and his customer could argue endlessly over what was supposed to happen on Tuesday. For the record, Edward is telling the truth. But it really does not matter because he made the unfortunate decision to editorialize concerning the customer’s order.

Truth be told, we have probably all editorialized at one time or another when asked a question. For example, someone might ask you for the time, but you respond with instructions on how to make a clock. Editorializing occurs when you provide more information than is actually required. To the service professional, this information might be related to a specific event that, in and of itself, would not be critical to customer satisfaction, but could easily result in confusion or a misunderstanding. Edward should have streamlined his message, focusing on specifics that would be of assistance to his customer; in this instance, the date on which the customer would receive his order.

Incidents such as the one described above occur because some customers will hear only what they want to hear, regardless of what you actually say. In all customer interactions, it is not what a service professional says; it is what a customer hears that matters most. Providing exceptional customer service is all about meeting or exceeding customer expectations. This reality begs the question: What do customers expect?

Unfortunately, the answer to this question is relative since every customer is different and their expectations therefore will vary depending on their own unique situation. Each customer has individual needs, wants, and

expectations. With this in mind, the primary objective of a service professional should be to maintain consistency in his or her message, whether it is verbal or written communication. The role of management is to create an infrastructure that enables front line representatives to convey a clear, concise, and comprehensive message to a customer void of editorializing. This requires access to data, accurate information, and uncomplicated parameters on how to communicate the same to customers. In the absence of such, front line representatives will tend to editorialize.

A first step for management in establishing a consistent message to customers should include a list of the various situations that occur on a daily basis. While brainstorming with front-line representatives, two vital pieces of information for each situation surface: (1) key points to cover with the customer, and (2) a suggested response. Building a repertoire of key points and corresponding responses eventually yields a heightened sense of awareness to consistency, resulting in additional recommendations and continual improvement.

I have learned that words relevant to scheduling, i.e., time and day, should be used with caution due to the nature of what a customer hears. In Edward's case, the customer heard three different daily events – namely Friday, Monday, and Tuesday. The customer mistakenly reasoned that Tuesday was the delivery date perhaps because it was the last day mentioned during his discussion with the service representative. They might have just as easily latched onto Friday or Monday as their delivery date.

I urge service professionals to be on guard against editorializing. When dealing with delivery confirmations, it is best only to convey time and day information that is directly related to achieving customer satisfaction. There is a simple rule about editorializing: Customers cannot hear what service professionals do not say. Armed with

this knowledge, a service professional should eliminate - or at the very least, minimize - editorializing by focusing on a message that will satisfy the customer.

Another way to avoid misinterpretations is to follow up with each and every customer prior to service delivery. A simple telephone call, e-mail, or postcards that summarize the service event are proactive techniques that can minimize confusion and misunderstandings. Let's face it, customers are sometimes wrong in what they perceive. But that is not the point. The role of a world-class service operation is to avert mix-ups by not allowing them to happen in the first place. Some customers are busy, harried, distracted, and impatient when they call. It is the responsibility of the service professional to help these customers achieve satisfaction regardless of their circumstances. Organizations that focus on and strive to improve the subtleties and nuances of the communication skills of service representatives are the companies that succeed.



Over time, projecting subtleties and nuances through tone of voice will become second nature to a service professional. Reading the subtleties and nuances in the customer's voice will also become second nature and help the service professional facilitate the interaction.

But what happens when, instead of a person, there is a machine at the other end of the line? There is not much time to compose your thoughts when you contact a client and receive their voice mail instead.

## ***Voice Mail Etiquette***

It happens frequently, sometimes even daily, and we experience it at a very personal level. You make a telephone call with the intention of speaking with a colleague, a vendor, or a customer. You instead get their voice mail. Initial disappointment gives way to the reality

that you must deal with the situation and begin to struggle with what to say and how to say it. Had you reached a person, you would likely start your conversation with a greeting or perhaps a question about how the other person was feeling. Then you would be prepared to respond with how things are going with yourself. All in all this is the makeup of a very nice social interchange.

But now you must speak to a machine which cares about neither you nor the person for whom it is taking messages. The machine is merciless, unbiased, and highly efficient. It will capture in great detail every nuance of your voice if you were to struggle through a cryptic, unintelligible, or rushed message.

Voice mail gets a bad rap. I hear the same tired complaints about voice mail when consulting with organizations regardless of their location. “No one ever calls me back.” “I need an answer now, I can’t wait until later.” “I don’t know whether the person I am leaving a message for is even in the building.” I believe that these complaints are for the most part a manifestation of a systemic problem. The trouble is one of cause and effect, i.e., Garbage In, Garbage Out (GIGO).

In technical terms, GIGO occurs if invalid data is entered into a program; the resulting output also will be worthless. GIGO is usually referenced to the fact that computers, unlike humans, will unquestionably process the most illogical of input data resulting in an unsound output.

I view a voice mail system as nothing more than an input/output device. If we insert garbage, we will likely receive garbage. In terms of voice mail systems, garbage includes messages filled with one or more of the following:

**Rapid pace of speech:** This makes it almost impossible for the person hearing the message to capture pertinent information. Some listeners have been known to replay the same message numerous times in an attempt to write



down a telephone number. This clear waste of time frustrates the person listening to the message and also tarnishes the image of the fast-talker who left the message.

**Verbal junk:** This usually manifests itself in the person who is uncertain as to what to say and instead stumbles with sounds like “Uhhhm,” “Duuuh,” or “Hmmm”. The voice mail system captures their ramblings for public record as the caller attempts to pull together their ideas. Business professionals ought to be careful of what they say into voice mail as these messages are digital files which can be shared or distributed among others.

**Non-contiguous details:** This phenomenon is a result of inadequate preparation – or the absence of any - prior to making a telephone call. The person leaving the voice mail message skips from one detail to another with no regard to the sequential flow. Imagine then the person who listens to this message trying to connect disjointed pieces of information.

Voice mail message would be of higher quality if the above three maladies could be avoided. The more quality goes in, then the more quality inevitably will come out. I believe that voice mail greetings can invite a quality message by asking callers to speak slowly, to state their telephone number twice, to leave only vital or important details, along with a best time for a return call. A service professional should acknowledge receipt of voice mail messages with a return telephone call to the person who left the message. This is important even if the subject matter in the message will not be immediately handled, resolved, or dealt with. Acknowledgements go a long way towards keeping customers informed and at ease. Depending on the nature of your business, voice mail greetings can also include information about your whereabouts, for example, whether you are in the office, out for part of the day, or on the road.

Business professionals should check their voice mail messages frequently each day, preferably once an hour.

By doing so, if an urgent matter arises, you can deal with it sooner, rather than later.

Voice mail is a powerful business tool in the hands of a competent person who understand the systemic implications of GIGO.



Whether the service communication is conducted through voice mail or in person, details alone, though vitally important, are not enough. Service professionals can be competent, they can ooze confidence and health, they can handle all of the important details efficiently and resolve issues quickly, yet they may still leave the customer feeling cold from the service interaction. For the customer, it's a bit like getting a very nice birthday gift in an unwrapped box. The wrapping helps to make it special.

## ***Your Best Lesson***

Our mothers probably gave us our first and best customer service lesson when they taught us to say “May I,” “Please,” and “Thank You.” These polite words still work wonders towards building rapport between individuals, setting a positive tone for what will follow after initial contact, and in minimizing adversity. How can something so simple be so profound? The answer is not always obvious. Innovative service organizations have included the “May I,” “Please,” and “Thank You” vernacular into their culture in an effort to differentiate themselves from their competition. Why? This is because too many companies do not inculcate this behavior as a core principle among their employees.

One of my call center clients handles numerous scheduling and logistical tasks for residential construction contractors. The call center agents make thousands of daily calls to homeowners to ascertain a mutually beneficial time and day for an estimator to visit their

home. An average homeowner expects construction workers to be rough-necked, blue-collar workers for whom manners and eloquence are secondary. The images that people have about what a construction worker should look and sound like are based on experience or hearsay. These biases sometimes run deep. Yet, I saw this as an opportunity for my construction contactor client to gain a competitive edge and strategic advantage.

My pre-assessment work with this client revealed that their call agents left numerous voicemail messages for homeowners. I noticed when monitoring their phone calls that when a homeowner responded to voicemail messages the agents missed opportunities to be polite and, thereby to differentiate their company from the competition. My monitoring identified agents who were rushing through scheduling options right at the onset of the call. It was clear to me that these agents were more interested in ending their calls in order to move on to the next one. Ending the call in an expeditious fashion was in the best interest of both the agent and his or her team as each was graded on their call center metrics. One of the key metrics was the average handling time (AHT) or the average length of each phone call for that team.

After completing my monitoring assessment work, I suggested that agents start each returned phone message with the phrase, "Thank you for returning my call." I also suggested that the call agents verify the name of each customer name by asking, "May I please have the correct spelling of your last name?" My suggestions were initially met with both skepticism and opposition because the extra words would increase the time for each phone call. The agents were afraid that the additional conversation would increase their AHT and thereby lower the standing of their team in the call center. I decided as an experiment to time just how long it would take to say, "Thank you for returning my call." The average result was 1.5 seconds. I then timed the sentence, "May I please have the correct spelling of your last name?" That took

approximately 2.5 seconds. Total time: 4 seconds. I then invited the call agents to trust my recommendation and risk adding the 4 seconds to each returned phone call. “If my idea doesn’t work, then just forget it,” I said.

My monitoring surfaced a completely new tone and rhythm to their phone calls after the agents implemented my recommendations. The “May I,” “Please,” and “Thank You” vernacular had a dramatic effect on customer behavior. The infusion of politeness resulted in two findings during my monitoring: The first thing it did was to surprise and delight customers since the communication style of the call agents was unexpected. The surprise was audible. It also helped establish a calm tone and demeanor during the call. The second result was a discernible rise in the flexibility of customers’ schedules that reduced the amount of time it took to agree on a mutually beneficial meeting. *This resulted in a reduction of the AHT for returned calls from customers.*

Companies who are adamant that their employees grasp the importance of the “May I,” “Please,” and “Thank You” vernacular often experience an up-tick in their business. It never ceases to amaze me how surprised clients are with results that are based on simple things that make common sense.

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It may seem overwhelming to the new service professional to try to keep in mind all of the techniques that help create great service interactions. However, with practice and patience yourself, these techniques will become as natural to you as breathing.

### Chapter 3 -- Reminders

- Never forget: **First impressions** are big.
  - **Develop a checklist** for your service interaction.
  - **Speak clearly.**
  - **Project** confidence and capability with your voice.
  - Distinguish similar sounding consonants over the **telephone**. “**Is that “N” as in Nancy or “M” as in Mary?**”
  - **Write** down the key facts. Have paper and pencil handy.
  - **Use the “W” questions:** Who, What, Where, Why.
  - **Pay attention to details**, but **do not editorialize**. Ask yourself what is it that the customer wants to know.
  - **Use voice mail etiquette:** speak slowly, state your telephone number twice, leave only vital or important details, leave the best time for a return call.
  - **Always acknowledge receipt** of voice mail messages with a return telephone call to the person who left the message.
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## Did you know you get 30 minutes of free telephone consulting or training when you buy one of Steve’s bundles?

“Taking advantage of Steve’s telephone training was worth every minute. Our customers noticed an immediate improvement in my staff’s professionalism.”

*Scott Robinson, Apple Heating*

## Chapter 4 –Problem Solving

Once you have your system in place regarding how you will gather details and relay information with the customer, you may think you have the main tools necessary for carrying out your work. Information service is what customer service professionals think of as the main part of their job, but really, problem solving is as much a part of the service professional's job as is information. Customers call not just to place orders, but to clarify, correct, return, and dispute orders. Often, there are problem-solving moments even during order placement. Being organized, knowing the details of your job well, documenting your work and taking notes are skills that will *always* assist you when faced with a problem solving moment.

There will be times, though, when the problems you are presented with have nothing to do with the service—and everything to do with the customer. Handling difficult customers without some methodology in your skill-set can be like trying to catch a fish without a fishing rod.

Developing customer interaction skills can help turn ugly situations into winning moments. There are a number of ways to develop these skills, but none quite as relevant as those secrets regarding how to deal with difficult customers that have been passed down from within the industry itself.

### ***Trade Secrets***

One of the dirty little secrets in the world of customer service involves a matter that is often carefully guarded. It rarely arises as a question among the numerous conferences at which I speak. But every now and then, a courageous attendee will broach the topic, each time leading to the same response. Someone in the audience

invariably gasps when the subject arises, while everyone else stares at me anticipating my reaction.

The nature of this dirty little secret involves customer behavior, but specifically as to how a service representative deals with customers who use vulgar language.

The answer to this dilemma includes a tactical response designed to stun the customer. Customers who use vulgar or “dirty” language are seeking a confrontation. They are offensive in order to keep you on the defensive. The customer wants a victory at the expense of the representative. This win/lose outcome will not produce a mutually satisfying experience. A service representative must therefore gain a tactical advantage over the customer to enable him to achieve a win/win conclusion. A noted military tactician fighting for the Confederacy during the Civil War said the simple keys to victory are to “get there first with the most” and “always do what the enemy least expects.” These same tactics are equally applicable when handling calls from irate customers using vulgar language.

Bad manners are excusable when dealing with upset customers; vulgarity is not. Customers using crude or vulgar language usually do so because of their emotional state. Representatives should tell customers who use such language, “I realize you are upset and I want to help you. But I am not in the habit of being spoken to in that fashion, nor do I speak with people who use that kind of language.” This polite statement will keep intact the self-esteem of the customer and allow the two of you to continue in your conversation.

Should the customer persist in using vulgar language, the representative must then disregard their self-esteem and, instead, make it a point to focus on their unacceptable behavior. To prepare for this, the representative should sit up straight, take a deep breath, and muster their most authoritative vocal tone for what will come next. Ask the customer to repeat the last sentence that contained the

vulgar language by saying, “Could you please repeat that last sentence, I am taking notes.” The customer should rationally think about what was just said and repeat the sentence minus the offensive speech. The customer should refrain from being vulgar from this point forward.

It is now time for the representative to gain control of the conversation. One of the best ways I know to manage an exchange is to pay the other person a compliment. This will keep you talking and them listening. After all, one is unlikely to interrupt when they are being given flattering comments. In my experience, two groups of people always respond positively to affirmative comments: men and women. Regardless of gender, the best way to gain a tactical advantage with an irate customer is to pay them a soft compliment.

The use of soft compliments allows a representative to turn the tables on difficult customers. Following are some effective soft compliments: “You did the smart thing by calling me because I can help you.” “I am glad you called because now we will be able to get things resolved.” “You have a good sense of how to get things done. You also did a very good job getting your ideas across to me.” Doing this reinforces your control of the situation by establishing yourself as the expert. Such an expert knows the difference between a good presentation and a bad presentation.

If, in extreme cases, the customer insists on the right to be vulgar, then escalate the call to your supervisor. In my experience, most telephone customers contact you for help, not so that they can be vulgar. Service representatives should strive for the win/win option and skillfully teach the problematic customer a lesson in manners. Socially unacceptable behavior is just one of the dirty little secrets in the customer service industry, but, hopefully, not for long. Perhaps service representatives everywhere will employ the aforementioned tactical



advantages and establish themselves as professionals who lead by good example.



When a belligerent customer takes you by surprise, no matter how calm you may stay outwardly, your body may react to the onslaught nevertheless. You may not even be consciously aware of the physiological effects that the interaction is causing. Awareness is the first step towards preparing the antidote.

### ***The Dreaded Morning Call***

Call center agents who process a considerable volume of telephone calls know the importance of balancing attitude and aptitude. Working in a call center can be demanding, especially during peak periods. Agents are trained to stay in character and maintain a positive attitude in order to perform at peak aptitude. When an agent becomes unnerved by a difficult or irate customer, their attitude is apt to suffer. When the attitude goes south, the aptitude usually isn't far behind.

One of the most troubling call center events that I have observed was the result of an early morning call from a displeased customer who apparently had been rehearsing his tirade. I have appropriately designated these events as the "Dreaded Morning Calls." Consider the following example:

On a sunny Thursday morning, Charles, a customer service representative, arrives at his call center in a terrific mood. Charles has had a good week thus far. He is preoccupied with thoughts of his upcoming weekend trip to the mountains. Charles begins his day confident that it will be just like any other.

He puts on his telephone headset and instinctively logs into the phone queue. He sees his incoming call LED light up, hears the click in his headset, and then greets his

first caller in a perfunctory manner. The caller is quite angry and Charles winces as the customer yells at him.

Charles is startled by the verbal assault and is quickly shaken out of his tranquil mindset. He is not prepared for a confrontation. He attempts to formulate a strategy, but to no avail. Charles is unable to focus his thoughts in a logical fashion. Trying to compose himself, he then inquires of the customer, "May I investigate the matter and call you back in a few minutes?" His hope is that this strategy will afford him enough time to regain his composure, collect his thoughts, look into the matter, and then respond effectively.

However, the customer is adamant in his resolve and replies, "No, I want an immediate resolution!" Charles is at a complete loss and unable to respond. He labors all through the call and thinks to himself, "It's going to be a miserable day!"

In the above example, Charles is struggling with his attitude due to the unforeseen demand of the customer. His deficient attitude also affects his ability to think, work, and prioritize (i.e., his aptitude). This "Dreaded Morning Call" was also stressful to Charles due to what took place inside his body the moment he heard the irate voice of the customer. Prior to answering the telephone call, Charles's metabolism was calm and steady. As soon as he was involved in the conversation with the customer, his metabolic rate surged to a heightened state of alert. This abrupt change negatively affected his attitude and thus diminished his aptitude and ability to carry out his duties as a courteous professional and an astute call representative. The "Dreaded Morning Call" had a profound effect on Charles due to the speed in which his metabolism was transformed from calm to stress.

Charles might handle numerous phone calls during a typical workday. Some are challenging while others are considered routine. As he works, his body's metabolism is adjusting itself to the day's challenges. So if he receives a

call from an irate customer sometime around 1:00pm, his metabolism has already been escalating at an incremental rate. His metabolism has already been conditioned by the numerous calls he has already handled. But, first thing in the morning, his metabolism was not conditioned. Thus, Charles found himself either thinking irrationally or, worse yet, not reasoning at all.

It is my experience that call center agents who encounter a “Dreaded Morning Call” usually do not recover or return to their usual level of productivity for the remainder of the business day. Have you ever had a “Dreaded Morning Call?” I have. They have taught me an important lesson about being prepared for the worst that can happen. I advise call center professionals to prepare themselves in advance for “Dreaded Morning Calls” when they arrive at work in the morning. I suggest a ten second adjustment, at which time you consider this question: "Am I ready for a “Dreaded Morning Call?" If the answer is no, then get into character, get serious, and alter your mental frame of mind. Develop a good attitude so that you will be able to perform at peak aptitude.

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Dealing with rude people can sometimes bring out the therapist in us. Customer service professionals already are aware, as discussed in Chapter 1, that there is an element of therapy to the customer service interaction. Rude customers are angry customers with problems they view as BIG, and they often turn our therapy burners on high. Therapy, however, may not always be the right choice for these situations.

### ***Fixing the Problem***

While waiting to board a West Coast flight back home to Philadelphia, I listened as the pre-boarding announcement began. These announcements typically include an invitation for frequent fliers to board first, followed by

everyone else. However, this announcement was different. Passengers were told that the flight was full and with more than half being frequent fliers, boarding would occur from the back of the plane forward, regardless of flier status.

It wasn't great news, but as a seasoned traveler I've learned to roll with the punches, that is, to remain patient and focused on the final destination - Home.

As boarding began, it soon became obvious that the flight attendants had their hands full. The hustle and bustle of getting passengers seated and their luggage stowed away in a fixed amount of time was a challenge. Almost every passenger had carry-on bags and the overhead storage compartments were filling fast. It didn't take long for storage space to run out, thereby forcing passengers seated in the front, myself included, to check their luggage.

One passenger in particular became indignant with a female flight attendant when he was informed of the scarce luggage space. The irate passenger looked this flight attendant in the eye, thrust his finger toward her face and yelled, "I can't believe that you let all of these other people on first, and then you make me check my luggage?"

Everyone within fifteen feet of them stopped to look and listen. The scene quickly fell silent, and it became clear to me that this was what I would have called a "MOMENT OF TRUTH." I watched with a keen sense of curiosity as the flight attendant nodded emphatically and then informed the passenger in a calm and reassuring manner that she would personally check his baggage. Aware now of the sharp contrast between his tirade and the calm response of the flight attendant, and realizing that he had behaved like a jerk, the previously irate passenger agreed to her offer of personal service.

As a customer service professional, a moment of truth occurs when training and preparation are put to the test. It

is a situation when rational thinking, a calm demeanor, and a deliberate response must prevail. Most importantly, you only get one chance to get it right. If the flight attendant had given even a hint of rolling eyes, snippy retaliation, or apathy, then her confrontation with the irate passenger could have escalated. Remaining calm is not easy, but it is achievable with practice and application even in the midst of a personal attack.

What causes some customers to behave so badly? It may be that they have been rewarded in the past for their bad behavior with special treatment or immediate service. These customers have learned the cause and effect relationship between their exaggerated behavior and exclusive accommodation. Some believe that being a customer entitles them to be demanding and condescending. And still others either don't think before they act or they're just plain ignorant.

The challenge for service professionals is to remain calm, think rationally, and to not take things personally when customers imply blame or make their criticism personal. The ability to detach oneself from a situation along with preserving the self-esteem of the customer is a key part of rational thinking – no matter what. The likelihood of a mutually satisfying resolution increases if a service professional can maintain good composure, respond appropriately, and show genuine empathy for the customer. However, once the self-esteem of a customer is damaged with an inappropriate response, the offended party might become defensive or, worse yet, play the victim with even more reason to carry on.

The maxim “the customer is always right” unfortunately has confused some service professionals due to the apparent incongruity between reality and the maxim itself. This confusion might cause a few service professionals to focus on and attempt to fix a customer's behavior. Service professionals must strive to fix problems, not bad behavior. Getting to the root cause of what is causing the

customer to behave badly will eventually fix the behavior. Therefore, when a customer is wrong, it's the service professional's primary job to contain the situation so it doesn't get worse. The ability to keep a situation contained takes practice, application, resiliency and a positive attitude along with a desire to do what is correct.

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Whether a customer with a problem is behaving as a jerk or a saint, there will still be times that you will not be able to solve their problem or fulfill their service need. As a customer service professional, you want to do everything possible to give your customer what it is that they want. Like a grandparent spoiling a grandchild, you want to say "YES." Sometimes though, that is just not going to be possible. How do you go about letting the customer know that they *can't have* what they want?

## ***The Art of Saying "No"***

Every service and sales professional faces the same dilemma on a daily basis whether customers contact them via telephone, walk in to their establishment, or correspond in writing. It is not driven by malice or deceit. Most often it is simply the natural progression of the sales and service process. Your transaction is moving ahead smoothly when the customer stops to ask a question about the product, service or company policies. Then anxiety builds up inside. You would prefer to say "Yes," or "Certainly, our product can do that," or "I can ship it today." But you will not utter any of those phrases today because you must speak the truth. And the truthful answer is "No," or "I am sorry, but our product does not do that," or "I can not ship it today."

This is the quandary of how to say "No." Saying "No" might make you feel unpopular or appear like a killjoy. Conveying seemingly bad news to someone else might bring to an end all of the goodwill that you have been

creating while attempting to negotiate a sale or provide a service. Regardless of how a service professional might feel personally about having to say “No” to a customer, sometimes the answer must be “No.” What separates the seasoned professionals from amateurs in the sales and service business are three distinct behaviors: (1) knowing when to say “No,” (2) knowing why to say “No” and, (3) knowing how to say “No.”

The first key behavior involves a sense of timing and good listening skills. Most service professionals have an instinctual sense when dealing with a customer that they must respond in the negative. This “sixth sense” triggers our response to provide an immediate answer. Our reply is communicated without any pause whatsoever on the heels of the customer inquiry. This is not an acceptable reaction since timing is a vital communication skill. We should allow ourselves a moment or two to formulate a qualifying question in order to ascertain the importance of the criteria. As an example, if a customer were to ask “Can you ship my order today?” you might qualify your answer by saying “If you received the order the day after tomorrow, would that be OK?” Your question qualifies the criteria required to achieve customer satisfaction. Should the customer answers “Yes,” then you have the flexibility to ship the order tomorrow so it arrives on the following day. In this illustration, the technical answer to the question was “No.” However, with a pause, some time to formulate a rational response, and a bit of finesse, a much more creative answer surfaced.

There will be instances when the consequences of doing what a customer requests will outweigh any benefits. One such case might arise when a service professional risks the stability of his fulfillment system in order to satisfy the request of a specific customer. In said circumstance, it is important that the customer understands why you cannot carry out their request. Any explanation must include the final key behavior: knowing how to say “No.”

The concept of knowing how to say “No” begins with an adherence to the fundamental principle of saying what you can do rather than what you cannot do. When a service professional conveys what they can do, it keeps the proverbial door open so that the dialogue and the business relationship may continue. However, when a service professional resorts to what he cannot do, it threatens to limit future dialogue as well the business relationship.

One of my clients has, with a simple phrase, heightened their service vernacular and the satisfaction of their customers. That phrase is: “Here’s what I can do.” This axiom is posted in the workstation of each of their customer service representatives, to keep it at the forefront of their mind. It produces two key benefits: (1) It keeps the door open and, (2) It gives the service representative something to say while he thinks creatively about how to respond to customer demands. When it comes to keeping customers satisfied and the door of business opportunities open, a little time may make all the difference.

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There are customers with problems and problem customers. As you gain experience in this industry, it will get easier and easier to determine which you are dealing with in any particular situation. Once you know *what* kind of problem it is that you are dealing with, you will know how to go about resolving the issue. Learn to view every service interaction as a training session. When dealing with angry customers we are more apt to make mistakes. No one is perfect—you will make mistakes. When you do, learn from what you did wrong.



## Chapter 4 -- Reminders

- **Being polite** with rude customer will keep intact the self-esteem of the customer and allow the two of you to continue in your conversation.
  - **Gain control** of the conversation with irate customers by paying the customer a compliment.
  - **Be the expert.** Reinforce your control of the situation by establishing yourself as the expert.
  - **Be prepared** for the dreaded morning call.
  - **Fix the problem**, not the customer's behavior.
  - **Get to the root cause** of what is causing the customer to behave badly will eventually fix the behavior.
  - **Know when to say "No."**
  - **Know why to say "No."**
  - **Know how to say "No."**
  - Use the phrase "**Here's what I can do**" instead of simply saying No.
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**Did you know that Steve Coscia conducted the customer service industry's first study on telephone stress back in 1996?**

**Tele-Stress<sup>®</sup> is a registered Trademark of Coscia Communications Inc.**

## Chapter 5 – Managers, Listen Up

The advice in this section will help all customer service professionals, whether you are a manager or an employee. Managers, though, can get a nice tune-up with the ideas presented in this chapter. Why? Because this chapter is about seeing the big picture. The more you are able to see the big picture, the better you will be able to problem solve and deal with issues that affect all customers, service professionals, and the bottom line, over the course of time.

### ***Customer Satisfaction and Retention***

Back in the early 1980s, toll-free numbers began to appear on consumer products such as household goods, foods, and other sundry items. The introduction of toll-free numbers coincided with and resulted from a study that was published by the Technical Assistance Research Programs Institute (TARP). The TARP report surfaced a completely new approach for corporate America to think about consumer complaints. For the first time, research provided evidence of a strong relationship between customer complaints and customer loyalty. Prior to the TARP study, complaints were considered to be a drain on business resources. That way of thinking changed after the TARP report confirmed that proper handling of customer complaints can be a valuable asset to a company in marketing and sales.

The TARP report noted that when major complaints—i.e., over \$100.00 loss—were resolved quickly to a customer's satisfaction, 82% of the complainants reported that they would maintain brand loyalty. Among those whose complaints were not satisfactorily resolved, 19% indicated they would make a future purchase. However, only 9% of those who failed to register a complaint said they would repurchase. The significance of these figures indicates that there are benefits in getting customer feedback,

whether positive or negative. Contacting those 9% who have not lodged a complaint could more than double the retention rate of these customers to 19%. *And all it takes it a telephone call.*

TARP has conducted numerous subsequent studies among various industries. The aggregate results continue to indicate benefits to companies who promote active listening and proper handling of complaints. If you are wondering why some of your regular customers have not done repeat business with your firm, invest the time to contact them and solicit their comments. Get these customers to talk to you!

Given a choice, with whom would you rather associate: a pleasant individual or someone with a nasty disposition? The answer seems obvious. It is because of our innate desire to avoid conflict that some companies are reticent to contact problematic customers. “Good” customers only tell us what we like to hear. They are content with our products or services. They like doing business with us. And they recognize the value of the work we do. However, now and then, a product fails or a service falls short of customer expectation. When this happens, a “good” customer might become disenchanted with us. They might even complain vehemently or take their business elsewhere. What happens next? If your subsequent action is to abandon this customer, then you just might lose out on a sales opportunity.

During slow economic periods, it is a good strategy to review customer files and then contact those with inactive accounts as well as those prospects that might have been previously neglected. My own experience in doing this has been very positive. I have generated a substantial ROI by investing quality time in creating a call list and then preparing a calculated and sincere justification for initiating each telephone call. Most businesspeople have an undeveloped revenue stream waiting to be tapped in the files on their Rolodex or their computer databases. It

takes an organized, focused, and diligent person to transform latent income into positive cash flow. It also takes some courage and, dare I say, audacity, to train oneself to believe that your effort is an investment that will mutually benefit both you and your customers.

A few months ago, I purchased third-party printer inkjet cartridges from a local vendor. Then, in the midst of a large printing project, a few of the cartridges failed. Needless to say, I was quite frustrated. Rather than complain to the vendor, I assumed that the third-party cartridges were of low quality and so resumed buying original manufacturer cartridges. To this local vendor, I am a customer who had a problem, did not complain, and chose to take my business elsewhere. Since only 9% of this type of customer remains loyal, it is unlikely that I will buy from this local vendor again unless someone from the company contacts me. To date, no one from the company has contacted me or inquired as to why I have not recently placed an order. A dialogue might result in an explanation as to what happened and how the vendor could improve their service. Since no one has yet to call, my company will remain an unrealized revenue source to them.

One thing is certain: If you do nothing, then nothing will happen. However, if you think creatively, get organized, make a call list, and maximize your resources, the opportunities will abound.

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“A bird in hand is worth two in the bush” goes the old saying. Reconnecting with customers who stopped buying your product is important to your business and can help you resolve important problems that you may not have been aware of. In the meantime, however, you have customers at this very moment who *are* buying your product. What can you do to insure that these customers are getting everything they want?

## ***Don't Forget The Upsell***

My wife was seething, frustrated due to an unpleasant experience at a local food takeout establishment. An hour or so prior to a raucous entry into our home, she had telephoned me as she prepared to leave her office with a suggestion of picking up some takeout fried chicken on the way home. It sounded like a good idea to me.

Our pleasant telephone conversation was in stark contrast to her current behavior. “What happened?” I asked, curious as to what could have caused so much frustration and angst.

My wife then proceeded to describe her exchange with the food takeout store cashier. For starters, the cashier seemed more interested in his conversation with a coworker than in serving customers. Being a person with a genuinely pleasant nature, my wife overlooked his discourteous behavior and proceeded to place an order for twelve pieces of chicken. The cashier quickly rang up the order and held out his hand in a gesture requesting payment even before my wife could request a side dish.

“I’m not finished ordering yet,” she said. The cashier responded by rolling his eyes in a gesture expressing inconvenience at what he perceived to be additional work. She continued by ordering side dishes of green beans and rice, and then paused as she considered whether or not to buy biscuits. Again the cashier quoted the order total and held out his hand for payment before my wife had an opportunity to order biscuits. Adding biscuits to the order seemed to irritate the cashier even further as it required him to adjust the cash register transaction to undo the previous total. Certain that she was now finished with her order, he again rang up the total, only to be dismayed to learn that my wife also wanted a slice of cheesecake for our son.

As her account unfolded in agonizing detail, all I could think about was the absence of an upsell. Did anyone train the cashiers to ask, “What else can I get for you?”

In my opinion, the absence of upselling is unfortunately pervasive within numerous segments of the business community. It is a skill that I learned as a sixteen-year-old working for a local meat market. My boss taught me a number of important lessons, among them the characteristics of upselling. He explained to me that *if I gave each customer what they intended to buy, then I had not sold them anything*. “Making a suggestion to motivate a customer to buy something they did not intend to buy – that was upselling,” he instructed.

Opportunities to upsell abound in every segment of business. When executed with courtesy and skill, upselling can add significant revenue to incoming orders. The key to effective upselling is to suggest an item or product complementary to what was ordered. For example, if a customer orders a hamburger from your establishment, it should be natural to recommend fries. Or, should buyer purchase a shirt at a clothing store, the salesperson might suggest a matching tie. Again, if a client orders a printer from a computer supply outlet, a representative could propose the purchase of ink cartridges. And so on.

It takes time to prepare a list of natural pairings, i.e., products which obviously go together, but it is time well invested. Managers interested in maximizing the upselling potential of their company should create a team of employees assigned with the task of developing product pairings. The likely result will be ideas for pairing never before considered.

A stable infrastructure subsequently should be implemented to enable customer service representatives to suggest other natural pairings. Unfortunately, this is where many upselling initiatives fail. A support infrastructure is required since most customer service

representatives will forget to upsell. This is only human nature. During a customer telephone call, a representative tends to focus his attention not on the upsell, but rather on the accuracy of the items ordered, the shipping information, the method of payment, etc. A reminder is therefore essential to prompt a customer service representative to suggest a natural pairing.

From a performance perspective, upselling should never become overbearing or aggressive. The best upsellers do it in such a way so that the customer does not even realize they are being upsold. As in all customer service interactions, the pace, rhythm, and tone of voice play a large part in successful customer communication.

In time, additional and significant revenues from upselling can result from sensible investments in planning and infrastructure.

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Smart managers know that upselling is not only important to their business's bottom line, it is also important to the customer's satisfaction through giving the customer the opportunity to make a purchase they want but forgot to order.

Managing your staff and customers to the satisfaction of both is an art and a science. Keep the big picture in mind while dealing with the details. A well-trained staff will not only make your job easier and your customers happy, it will ultimately affect your bottom line in very positive ways.

## Chapter 5 -- Reminders

- **Be visible:** A supervisor's role during times of peak activity is to be visible and lead rather than manage.
- **Be aware:** Do not get so involved in the details of a busy sales hour that you miss the customer and staff interventions that are needed.
- **Hold the vision:** During stressful customer service situations, a good leader conveys a simple and clear vision of a "better place". When those around hear this message and believe that it is attainable, they inevitably respond with support for those in leadership.
- **Train your staff:** Good customer service needs to be good every day, and that comes from a well-trained staff.
- **Make courtesy a priority:** Businesses that say "we only hire nice people" really mean that they have made courtesy a priority.
- **Establish a system:** Make sure that you have a clear set of procedures for handling customer complaints and that your staff is knowledgeable in all aspects of the procedures.
- **Keep customers current:** Review customer accounts and follow up on inactive accounts.
- **Train for sales:** Don't forget the upsell!
- **Don't rush your customers:** Patience is a manager's and service professional's virtue.



## Chapter 6 – Final Words

As we near the end of our lessons here, let's look back at the big picture. It's easy to get lost in the details of our jobs—whether we are building contractors or fast food service professionals. Although details are vital, even crucial, to our doing our job well and satisfying our customers, if we forget the big picture and the point of our mission, we can get lost in the world of our details. We can begin to wander. I learned some of the most important lessons about life, work, and the big picture from my father. I helped him with his work and he helped me with life's valuable lessons.

### *Life's Service Lessons*

The most meaningful lessons I learned about work, life, and serving others came from working with father. My father was born in 1912 and managed to achieve only a fifth-grade education. Students who were unable to maintain specific academic standards in those days discontinued their education after the fifth grade in order to enter the work force. I suppose my father just did not learn the way other children did. In subsequent years, he moved from one manual-labor job to the next. This was no problem for my father as he was stronger than most.

My father eventually began an association with construction crews where he developed a skill for working with concrete. Even in the absence of a formal education, he was able to teach himself the use of a slide rule so that he could calculate the amount of materials required to complete a project. Although the mathematical computations were an exact science, my father possessed something intrinsic. His skills included a visceral understanding of the texture, density, and granularity of

concrete. He knew his craft, and from him I learned that expertise was earned through years of hard work and application.

Many a Saturday as a boy I spent accompanying my father on one of his smaller concrete projects such as driveways, patios, and walkways. We would rise early to load a large concrete mixing bin on top of his 1959 Ford station wagon. After gathering the necessary shovels, hoes, trowels, levels, and toolboxes and storing them in the car, we would drive to the local construction depot.

My father taught me the importance of knowing how to select and use the correct tool for the appropriate job. Furthermore, I also learned the importance of properly storing the tools so that we would be able to locate them when needed. I came to understand that being organized is a key to success whether I was a laborer or a consultant.

A variety of contractors converged at the construction depot early in the morning in order to acquire supplies for the work that day. I can remember being in awe of these men. They had character: rough beards, muscular biceps, and all seemingly smoking Camel cigarettes. Their dress code was similar: green construction trousers, tee shirt, and heavy work boots. Their tough exterior was in stark contrast to their gentle and considerate demeanor. This taught me much about mutual respect and the principle of the Golden Rule.

After ordering his concrete, sand, and cinderblocks, my father and I would usually load the bags of concrete and the cinderblocks into the Ford while waiting for the sand to be delivered at the job site. He carried the 94-pound bags of Portland cement while I lugged the cinderblocks. I was not yet strong enough to lift the heavy bags of cement, so I took the cinder blocks, one in each hand, regardless of how much it hurt to do so. Loading the station wagon was an exercise in cooperation. There was a pace and a rhythm to the work that had to be maintained

as we worked in tandem. This was an important lesson in teamwork.

Once at the job site, we retrieved the forms and laid wire mesh. I was the designated mixer for the numerous batches of concrete. Every now and then, my father would reach into one of my batches and grasp a handful of concrete. Most times he gave me a nod of approval regarding its texture. But just as often he would give me suggestions to add a little more sand, water, or Portland cement. I never knew how he could make these determinations with just his fingertips. He had a special sense about these things.

My father and I would discuss the work of the day on the drive home from the job site, including obstacles we each had overcome as well as the successes and opportunities. All the while, my father would smoke his Camel cigarettes and confide in me about his future plans. He almost always had a goal. I suspect that goal setting was one of the most meaningful lessons which I learned from him.

One of my goals back then was to be able to lift a 94-pound bag of Portland cement. When I had grown big enough to eventually hurl one of those bags onto my shoulder, I felt as though I had achieved a rite of passage to manhood.

I urge Dads everywhere to create teachable moments with their children to help them learn the most meaningful lessons of life. Never forget the goals, the successes and opportunities. May your journey be golden.

## Chapter 6 -- Reminders

- **Believe in what you do.**
- **Be open** to learning the skills that you need to be successful in your profession.
- **Learn what tools are necessary** for your profession, acquire them, and use them properly.
- **Hard work** and application go a long way. Learn everything you can about the skills you need for your profession.
- **Take good care of your work tools and be organized.**
- **Be prepared.** Things can go wrong, but if you are prepared for that, you will deal with it more effectively.
- **Be a team player.** Your success depends on others.
- **Review your work.** Take stock of your work at the end of the day and decide on the adjustments you need to make for a smoother and more successful day tomorrow.
- **Make plans.** See the big picture of what you want your job to become and what steps you can make to bring that about.
- **Have goals and dreams, and go after them.**