

## The Customer Service Survival Kit: Customer Service Essentials



What to Say to Defuse Even  
the Worst Customer Situations

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## Course objectives



- ⌘ Improve your interpersonal skills with customers.
- ⌘ Have shorter, easier customer transactions.
- ⌘ Know how to handle any customer in any situation.
- ⌘ Learn how to work better with less stress.

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## Customer service: more than just "a good attitude"

- ⌘ Great customer service has less to do with personality, and more to do with skills, than most people think.
  - ☒ "Nice people" who can't service a transaction properly will leave customers unhappy.
  - ☒ "Average people" who apply good transaction skills professionally - and sincerely - will do a great job.
  - ☒ Rude, indifferent people will fail no matter what they do.

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## The good news

⌘ Customer support primarily consists of:

- ☑ Known situations which can be understood and managed.
- ☑ Specific techniques which have been proven to work.
- ☑ Common skills which can be learned.

⌘ These techniques combine with your knowledge, your resources and your organization to solve customer problems.

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## Section I. Basic Interpersonal Skills

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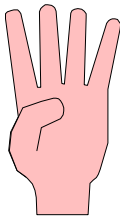
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## The four basic interpersonal skills: The C.A.R.E. principle



- ⌘ Communication
- ⌘ Action
- ⌘ Respect
- ⌘ Empathy

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## Communication

- ⌘ Much more than talking and listening.
- ⌘ A very active process of:
  - ☒ Interpreting the customer's statements
  - ☒ Making sure the customer is understood
  - ☒ Seeking confirmation and closure
- ⌘ The single biggest factor in good rapport and smooth transactions

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## The art of active listening

- ⌘ 1. Give your undivided attention, then respond.
- ⌘ 2. Re-phrase what the other party says before your reply.
- ⌘ 3. Share your knowledge of the situation.
- ⌘ 4. Provide active feedback: silence isn't golden.
- ⌘ 5. Summarize understanding and obtain buyoff.

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## “Staging” – a three-step technique for delivering bad news

- ⌘ Introduce what you are going to say *before* you say it.
- ⌘ Explain the reason for what you are saying *as* you are saying it.
- ⌘ Empathize with the customer's feelings *after* you have said it.

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## Taking action

- ⌘ Many service transactions end with "action items."
- ⌘ Common source of frustration, and more transactions
  - ☒ As many as 60% of help desk calls are just to check status of an existing problem. (Bill Rose, SSPA)
- ⌘ A good first transaction + no action = an angrier customer

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## Demonstrating action to the customer

- ⌘ Use the "verbal receipt" approach:
  - ⌘ 1. Provide a pro-active summary.
  - ⌘ 2. Communicate action items clearly to the customer.
  - ⌘ 3. Establish "ownership" of the transaction.
  - ⌘ 4. Get action items and follow-up activities in the pipeline as soon as possible.

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## Respect for the customer's agenda.

- ⌘ Problems are often "gift-wrapped" with the caller's feelings about it:
  - ☒ Level of urgency
  - ☒ Degree of expertise required
  - ☒ How critical the problem is to them
- ⌘ Use the "playback" approach:
  - ☒ Because you \_\_\_\_, I am going to \_\_\_\_
  - ☒ Because you \_\_\_\_, I recommend \_\_\_\_
- ⌘ Respect = acknowledging customer problems *and* customer's agenda.

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## Showing empathy

- ⌘ Customers want their problem solved *and* their feelings validated.
- ⌘ We all fear appearing inept in front of other people.
- ⌘ What you say has an important impact on your customer's self-image.
- ⌘ Empathy frames transactions as encounters between peers.

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## Ways to demonstrate empathy

- ⌘ Use "phrase substitution"
  - ☑ "You're exactly right." instead of "Correct," "I sure can" instead of "OK," etc.
- ⌘ Acknowledge feelings and frustrations.
- ⌘ Share common experiences.
- ⌘ Reaffirm the customer's own competence.
- ⌘ Reassure concerns and self-deprecating statements.

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## Three "octane levels" of acknowledgment

- ⌘ **Observation:** Observe the other person's feelings and reactions
  - ☑ "I can see how upset you are"
- ⌘ **Validation:** Acknowledge the other person's feelings are **valid**. This always involves describing **other people**
  - ☑ "No one likes to wait for a shipment"
- ⌘ **Identification:** Identify with the other person's feelings
  - ☑ "I wouldn't have liked that either. What happened to you was not fair."

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## Leaning into criticism



- ⌘ Hand their complaint back to them
- ⌘ Use "Wow" words
- ⌘ Steal all their good lines
  - ☒ The "look up, look down" rule
- ⌘ Never defend yourself first

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## Section II: Your "Favorite" Customers, and How To Deal With Them.

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## Understanding the difficult customer

- ⌘ Customers are human beings, like anyone else.
  - ☒ Personalities vary like any group of people.
  - ☒ You deal with people when they have problems.
  - ☒ Certain situations can be frustrating for nearly everyone.
- ⌘ These transactions can be understood, and managed, like any other.

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## Preventing difficult transactions - doing the "can-can"

- ⌘ Always respond with what you **can** acknowledge and **can** do - however small.
- ⌘ You can avoid saying "no" much more often than you think.
- ⌘ Extremely effective in preventing confrontations.

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## Using the LPFSA

- ⌘ The what? The **Low Probability Face-Saving Alternative**
- ⌘ OK to propose this as long as you explain that it is low probability
- ⌘ Examples:
  - ☒ "We don't usually do this, but let me check with the manager first"
  - ☒ "Before we completely give up here, there is one last thing we might try"

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## Understanding the customer crisis

- ⌘ Factors which can cause a crisis situation:
  - ☒ Misunderstanding: Something well-intentioned is taken the wrong way.
  - ☒ Personality: Some customers are hostile and confrontational by nature.
  - ☒ Past history: A customer has had a bad past experience with your organization.
  - ☒ Different agendas: Certain situations or statements may be sensitive for some people.
  - ☒ Frustration level: A customer has a problem which is very important or has serious consequences for them.

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## Defusing a crisis – the “Triple A” approach



- ⌘ Acknowledgement: acknowledge feelings and give the problem importance.
- ⌘ Assessment: gather facts and assess the situation.
- ⌘ Alternatives: set boundaries and sell alternatives.

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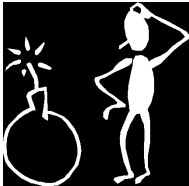
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## A taxonomy of difficult customers



- ⌘ The talk-a-holic
- ⌘ The timid customer
- ⌘ The untrained person
- ⌘ The never-satisfied

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## Handling the Talk-a-holic

- ⌘ Use the “acknowledging close”:
  - ☑ Break in to the conversation
  - ☑ Enthusiastically acknowledge the last thing that they said.
  - ☑ Ask binary (yes/no/short statement) questions.
  - ☑ Continue as needed to control the conversation.
  - ☑ Done politely and with class, the talkative user will feel you are paying close attention and react well.

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## Handling the Timid Customer

- ⌘ Use "feathering":
  - ☑ Listen carefully and intently.
  - ☑ Respond with a roughly equal mix of questions, feedback and reassurance.
  - ☑ Go slowly and avoid information overload.
  - ☑ Use plenty of courtesy and complimentary statements where appropriate.
  - ☑ Actively verify responses.
    - ☑ Use statements like "Exactly," "That's absolutely correct," etcetera.

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## Handling the Untrained Person

- ⌘ Refer them to more appropriate resources or training
- ⌘ Protect the customer's dignity.
  - ☑ Use emotionally neutral phrases describing the situation and not the person.
- ⌘ Know when to set limits.
- ⌘ Keep your supervisors in the loop.

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## Handling the Never-Satisfied Customer

- ⌘ Use the following four-step process:
  - ☑ 1. Ask them what they want.
  - ☑ 2. State the limits of what can be done.
  - ☑ 3. Acknowledge their concerns.
  - ☑ 4. Go back to step 1.
- ⌘ Repeat steps 1 through 4 until problem is resolved or escalated.

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## Should you ever hang up or walk away?

- ⌘ Abusive customer transactions require special handling. When these happen:
  - ☑ Do not argue with the customer.
  - ☑ Try to get the person's name and phone number for later contact.
  - ☑ Set limits on abusive behavior.
  - ☑ Escalate or report clearly abusive incidents proactively to your manager.
- ⌘ Know what to do ahead of time.

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## Action items to take back to work with you



- ⌘ Always acknowledge a customer's position *first*.
- ⌘ Respond rather than react.
  - ☑ Use key phrases aimed at situation, not person.
- ⌘ Behave counter-intuitively.
  - ☑ Agree with criticisms.
  - ☑ Empathize with frustrations.
- ⌘ Customer anger is rarely directed at you personally.

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## Thank You!

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