

## Performance Developmental Strategies for Customer Care

This document is a supplement to the **AccuVision WRS Customer Care Applicant Feedback Report – Section III**. It includes the development strategies related to all the tasks/competencies for the three Customer Care skills.

**CCI     *Customer Relations: Communicates in a positive manner, especially when handling complaints or conflict; efficiently obtains additional resources as needed to satisfy customer needs***

CC1.1 Remains polite and professional when interacting with customers who make unreasonable demands. (1)

CC1.2 Faced with a hostile customer, maintains positive demeanor and earnestly attempts to help the customer. (2)

CC1.3 Increases customer loyalty by immediately addressing concerns and following up. (3)

CC1.4 Handles competing customer needs in a calm and helpful manner, follows through on commitments. (4)

**CC2     *Decision Making: Makes sound decisions when carrying out company policies and guidelines, develops solutions for customer problems, recognizes the limits of own authority, and knows when a customer problem should be referred to others.***

CC2.1 Recognizes when it is best to personally handle customer needs versus when to direct the customer elsewhere. (5)

CC2.2 Recognizes priorities, then implements solutions based on an understanding of business need. (6)

CC2.3 Decides when to vary from routine operating policies/guidelines and when to adhere to them. (7)

CC2.4 Recognizes when more information is needed for making a decision. (8)

CC2.5 Recognizes the limits of own authority, correctly decides when to use those limits in order to keep the customer satisfied. (9)

**CC3     *Commitment to Quality: Works and communicates with clients and customers to satisfy their expectations; actively listens to customers to avoid misunderstandings.***

CC3.1 Evaluates alternative possibilities for customer satisfaction, then chooses one that minimizes harm and makes the customer feel supported. (10)

CC3.2 Proactively helps coworkers for the purpose of increasing overall quality of company operations. (11)

CC3.3 Voice, body language, and attitude communicate to the customer that satisfying the customer's need is of highest importance. (12)

CC3.4 Balances own work schedule against customer needs; willingly makes adjustments. (13)

CC3.5 Determines customer need and improves customer relations by "listening" to customer comments and requests. (14)

SKILL (CC1): CUSTOMER RELATIONS

TASK (CC1.1): Remains polite and professional when interacting with customers who make **unreasonable demands. (1)**

- ❑ Occasionally the actions of the customer may have contributed to the problem. Be careful to avoid placing blame when providing suggestions for how the problem can be avoided in the future.
- ❑ When a customer voices a complaint or problem, apologize and demonstrate concern for any inconvenience caused the customer. Remember that what might seem like a slight or minor problem to you may be a very significant issue to the customer.
- ❑ Recognize the need to show that you care for your customer's problems. Customers will calm down a lot if they believe you understand and appreciate their situation. Allow angry customers to vent their frustrations before attempting to offer assistance or question them further. In most cases, a customer will tell you how you can help them if you allow them the opportunity to work through their frustration.
- ❑ Keep in mind that if the customer's demands are unreasonable, and continue to be so despite your best efforts, then it may be time for you to alert your supervisor to the problem.
- ❑ Even when you are sure that the customer is incorrect in his/her complaint, do not point out the customer's error. Rather, make sure that you display to the customer only the most heartfelt desire to make it right.
- ❑ Once in a while a customer's "unreasonable" demand is not so unreasonable when you get to thinking about it. When the customer makes an unreasonable request, first assume that the request is not unreasonable but only a matter of misunderstanding – then, if at all possible, resolve the issue to the customer's satisfaction.
- ❑ Remain flexible in your thinking. Customers are likely to say and do anything. Be ready, stay calm, keep smiling.

SKILL (CC1): CUSTOMER RELATIONS

**TASK (CC1.2) Faced with a hostile customer, maintains positive demeanor and earnestly attempts to help the customer. (2)**

- ❑ When confronted by a demanding or difficult customer, try to keep up a friendly mood by introducing yourself and letting the customer know that you are there to help.
- ❑ Never assume that a customer is being difficult because he/she likes to harass others. There could be any number of reasons for the customer's difficult behavior. Simply remain calm and try to help.
- ❑ Occasionally, an angry customer may verbally attack you for a real or imagined problem. Remain calm. Take a few moments to consider before you respond. Then, as soon as possible, begin probing the problem further. Asking questions will help focus the customer on the real issue and help you determine the extent/cause of the situation so that the proper type of assistance can be provided.
- ❑ When nothing else works, ask the customer what he/she thinks will solve the problem. Sometimes we over-think problems, or we assume that the situation is worse than it is, when a simple solution will make everyone happy.
- ❑ Anticipate customer problems. Think through possible scenarios and be ready with alternative suggestions and/or solutions.
- ❑ After your "hostile" customer has left, consider how you did. Could you have done better? Did you remain calm? Was there anything you could have done that would have calmed the customer down a bit? Or was there something in your reaction to the customer that made the problem even worse? What can you do to make your next experience with a hostile customer better?
- ❑ Discuss the situation with others who have more experience. What would they have done in the same circumstances?
- ❑ Always remain professional when a customer gets hostile. Never get personal. Do not call the customer names, do not allow him/her to see anything other than a professional face. Remember, you are not there as an individual, you are representing your company. Most likely the customer isn't angry at you, but rather angry at something else.
- ❑ Do not react with hostility to a customer's hostility. This will only make the problem worse and result in a dissatisfied customer. If you are too close to the problem, ask another to stand in for you.

SKILL (CC1): CUSTOMER RELATIONS

**TASK (CC1.3) Increases customer loyalty by immediately addressing concerns and following up. (3)**

- ❑ Remember that assisting your customer is your first priority. Customers want to feel that you are sincere in your desire to help them and that they are not interrupting your “real” work.
- ❑ Sometimes it may be necessary for you to help customers locate certain products. When possible, put in the extra effort to accompany them to the correct aisle and lead them to the product. If you can't do that for whatever reason (say, for example, you are assisting another customer), then be very specific in your directions and guidance.
- ❑ If a problem cannot be immediately resolved and follow-up contact with the customer is required, take responsibility for making sure that the problem gets resolved.
- ❑ Sometimes you may need help from others in resolving a customer’s issue. When the problem is resolved, be sure to acknowledge the assistance of others by a personal “thank you”.
- ❑ Act on customer problems immediately. Do not delay hoping that the problem will go away. Take responsibility, it is your problem to resolve.
- ❑ If there is no way that you are going to be able to satisfactorily resolve the customer’s problem, make sure that your supervisor is informed. Maybe there is something that your supervisor can do that you cannot.
- ❑ Keep in mind that YOU are ultimately responsible for customer satisfaction. Anticipate problems, prepare for them, and when they occur, act immediately to resolve them.

SKILL (CC1): CUSTOMER RELATIONS

**TASK (CC1.4): Handles competing customer needs in a calm and helpful manner, follows through on commitments. (4)**

- ❑ On those occasions where you have two customers needing your attention at the same time, always be polite and respectful to both customers. Before attending to either customer, make sure that the other customer is okay and promise to get right back.
- ❑ If you leave one customer to assist another, be sure to return to the first customer when your business with the other customer is done. Make sure that the customer you left behind feels confident that you have done everything you could to assist.
- ❑ Consider how attending to one customer is going to affect the other customer. If you are not going to be able to get back to the first customer, find someone to take your place.
- ❑ Remember that your customers have different needs and experiences. Some may have had a bad day and are real intense and demanding, whereas others may be calm and cool. If you have multiple customers demanding your attention at the same time, try to evaluate their mood. The “squeaky wheel” generally gets first consideration but make sure that the other customer knows you will make every effort to help them as well.
- ❑ Sometimes it may be necessary for you to help customers locate certain products. When possible, put in the extra effort to accompany them to the correct aisle and lead them to the product. If for any reason you can't do that (e.g., you are assisting another customer), then be very specific in your directions and guidance.
- ❑ Recognize that in order to be of assistance, you must first assess the specific needs and requirements of your customers. If you are working with more than one customer, you must understand the needs of both and make sure that the needs of both customers are met.
- ❑ There are times when you must hand a customer off to a coworker. You can improve your ability to do so effectively by getting to know what your coworkers can and cannot do. Through conversations with your manager and experienced coworkers, learn the general function of other people and other departments. Seek opportunities to work with other departments to get to know them better. Build positive working relationships.
- ❑ Take the time to learn the roles and responsibilities of your coworkers so that you are able to anticipate their needs. In addition, try to see issues and situations from their perspective before you ask for assistance or place additional demands on them for help.

## SKILL (CC2): DECISION MAKING

### **TASK (CC2.1): Recognizes when it is best to personally handle customer needs versus when to direct the customer elsewhere. (5)**

- ❑ If you are approached by a customer with a request, consider all of the possibilities when giving your response. What is the best balance between your needs, business needs and customer needs? For example, you have just stocked a shelf and need to inventory the contents. If you walk away, you might lose your place and have to start over again causing you extra work and resulting in your getting less work done. You have to consider, does the customer want you to drop what you are doing and respond with personal attention? Or would the customer rather you just gave them a quick answer? Many customers want quick answers rather than personal attention.
- ❑ Remember that you must balance the needs of the customer with the needs of your company. There may be many ways to help the customer. Dropping what you are doing to help the customer may not be your best response. Think about all the elements of the decision. For example, “How long will it take to help the customer?” “Will simple directions be sufficient to help the customer or does the customer need to be escorted?” “If the task you are working on is disrupted, what will be affected?” “Is there anyone else around who can help the customer?” Somewhere is the balance that determines how you should respond to the customer.
- ❑ If you don’t possess the knowledge or background required to personally assist a customer, be proactive by referring them to someone who can help them. There is nothing more unpleasant than for a customer to hear the phrase, “I don’t know.” Or “I can’t help you.”
- ❑ In situations where it is necessary to refer the customer to another employee for assistance, and when time demands permit, escort the customer to the other employee and make appropriate introductions.
- ❑ Try to see issues and situations from the perspective of your coworkers before you ask them for assistance or place demands on them for help.
- ❑ When a situation with a customer comes up that you aren’t sure you can handle, it is best to go ahead and get higher authority involved, but then ask the higher authority whether or not this was something you should have handled.

## SKILL (CC2): DECISION MAKING

### **TASK (CC2.2): Recognizes priorities, then implements solutions based on an understanding of business need. (6)**

- ❑ If you don't know the answer to a customer's question, don't guess. There is nothing more frustrating to a customer than to be told one thing and then find out that the truth is something else. Either find someone who can answer the question, direct the customer to someone who can answer their question, or promise to find the answer and get back to them.
- ❑ Occasionally a customer may ask you for something that you cannot do (e.g., asks you to look for something in the back of the store when you can't leave the register). Under such circumstances, explain to the customer why you can't immediately respond and either suggest an alternative or promise to take care of it at a later time.
- ❑ Learn to recognize the type of customer requests that should be given priority status, and those that can be considered routine. Seek advice from your supervisor to define "priority status." You can also learn how to define "priority status" from watching your supervisor and other experienced personnel.
- ❑ Be proactive and attempt to make the customer's job easy. If you must research a customer's problem and contact the customer later, take the initiative to call the customer back. Avoid asking the customer to call you back. Making the customer's job easy should be a practice that you make part of your "routine" immediately.
- ❑ If a problem cannot be immediately resolved and follow-up contact with the customer is required, take responsibility for initiating the follow-up actions. For example, offer to call the customer instead of asking the customer call or come back later.
- ❑ Some people think that telling a phone customer that something is "in" or "ready" when they don't know for sure is an acceptable way to get the customer to come to their place of business. This is NOT a good idea. You could be driving away a perfectly good customer. Remember, no customers mean no profit, which eventually means no job.
- ❑ If a customer calls in making a request, and you know that you cannot provide exactly what the customer is looking for, be honest about it. Tell the customer that the product or service is not available. If circumstances allow for it, suggest a replacement that maybe the customer hadn't been aware of. Alternatively, promise to call back when the product or service is available, then remember to follow up. Failure to follow up will result in a loss of that customer. Following up will gain customer loyalty.

## SKILL (CC2): DECISION MAKING

### **TASK (CC2.3): Decides when to vary from routine operating policies/guidelines and when to adhere to them. (7)**

- ❑ Learn to recognize when a situation is outside of your level of authority. For example, if you are given certain guidelines for how to behave with a customer, but then something comes up that is outside of those guidelines, find a more experienced coworker to help out.
- ❑ If a situation comes up and you are in doubt, ask your supervisor for help. It is better to handle a customer problem correctly than to guess and get it wrong.
- ❑ Ask your supervisor what customer issues you can resolve versus those that need more authority.
- ❑ Customers with problems will often ask to speak directly to the manager. If you feel that you can resolve the problem to the customer's satisfaction, attempt to handle the problem personally. However, even if you feel it necessary to pass the customer along to a manager, get all the information you can about the problem first.
- ❑ Plan ahead. Think about possible customer problems and be ready with suggestions and/or solutions.
- ❑ If you feel it necessary to change from your normal way of doing things, consider how your change will affect other customers and coworkers. If necessary, seek supervisory help with the decision.
- ❑ Review and evaluate your decisions. Did you make the right decision? Discuss your decision with your supervisor. Should you have made the decision without guidance, or should you have sought out help?



## SKILL (CC2): DECISION MAKING

### **TASK (CC2.4): Recognizes when more information is needed for making a decision. (8)**

- ❑ If a situation occurs with a customer that is outside of your experience, before getting help from a more experienced coworker, first find out all you can about the problem.
- ❑ When determining a customer's needs, try not to ask questions that result in a simple "yes" or "no" answer. You will get further by asking questions such as "What do you need the product for?" "Tell me what happened." or "How often do you ...?"
- ❑ Get the customer talking. When you have all the information, you will be in a better position to decide how best to help the customer.
- ❑ Keep in mind that it is sometimes useful to repeat what the customer says in your own words. This is called "restatement." Restatement helps to prevent misunderstanding and ensures that any assistance you provide is on target.
- ❑ Customers who experience problems will often ask to speak directly to the manager. Before passing the problem on to your manager, attempt to obtain all the information about the problem that you can. In this way the manager can have a solution ready.
- ❑ Avoid jumping to quick decisions. It is better to take a little time, making sure that you thoroughly understand the situation, before making a decision.
- ❑ There are many choices you can make regarding how to help the customer. Don't assume that you know the answer. Sometimes customers want a discount, other times they just want to feel like you are doing something to help. Find out what the customer wants/needs before deciding what to do about it.

SKILL (CC2): DECISION MAKING

**TASK (CC2.5): Recognizes the limits of own authority, correctly decides when to use those limits in order to keep the customer satisfied. (9)**

- ❑ Learn to recognize what you can do and can't do for any situation. If, for example, you are given some leeway for giving away product (e.g., food in a restaurant, out of date sales prices) to a customer who has a bad experience, it may not always be necessary to do so. Learn to evaluate the balance between customer need and business need and base your actions according to that understanding.
- ❑ Sometimes it may be necessary for you remain patient with customers who seem to be making unreasonable demands. It may only be that they lack some understanding. Keep your voice calm as you try to resolve their problem.
- ❑ Occasionally, in the interests of maintaining good customer relations, it is necessary to let the customer "get away with it." Learn to recognize when it is best to let the customer have their way, and when it is best to say "no." Remember, even when saying "no," it is important to remain professional.
- ❑ Occasionally you will be faced with awkward customer situations. Discuss with more experienced coworkers what they have done in similar situations, then learn from their experience.
- ❑ Accept ownership for problems or complaints. Keep in mind that even though you, personally, may have had nothing to do with a problem, you represent the company to the customer. Avoid blaming others or procedures for problems that occur.
- ❑ After you have taken the necessary actions to deal with a customer's problem, identify yourself to the customer as someone they should contact if they have any additional needs.
- ❑ Keep up with all the new products and services offered by your company. You can do this through reading company newsletters, memos, and catalogs. Knowledge of what is available for your customers will help in balancing business need and customer satisfaction.
- ❑ When discussing the benefits of a product or service with a customer, tailor your comments to the specific customer. First, attempt to understand the needs of the particular customer by asking open-ended questions. What is his or her understanding of the product or service offered? Check for your own understanding by repeating their needs back to them in your own words. Then use your understanding of their needs to tailor your comments.
- ❑ Have supporting information available to back up your views and opinions when interacting with your customer. You aren't in an argument. However, the more information you can share with the customer the more likely you are to be able to resolve their concern.

## SKILL (CC3): COMMITMENT TO QUALITY

### **TASK (CC3.1): Evaluates alternative possibilities for customer satisfaction, then chooses one that minimizes harm and makes the customer feel supported. (10)**

- ❑ Attempt to thoroughly learn all your company's products and services. In this way you will be in a better position to evaluate different ways for meeting the customer's needs.
- ❑ When you can't possibly meet the customer's request, stay positive, keep a smile on your face, try to find some way to make the customer feel that you are doing all that you can to meet their needs.
- ❑ Maintain ownership of the customer's needs. Even though you may have to involve others in gathering information or in obtaining approval for certain actions, let the customer know that you personally will see to it that the customer's needs will be met.
- ❑ Discuss your difficult customer experiences with more senior personnel. Find out what they have done in similar circumstances. Maybe you can learn from them, maybe they can learn from you.
- ❑ In some situations, policies or procedures may not allow you to meet the customer's request. However, there may be other things that you can do that will allow you to fully or partially meet the actual needs of the customer.
- ❑ Make use of coworkers when trying to come up with solutions to customer problems. Sometimes more heads are better than one.
- ❑ Anticipate customer problems. Think through possible problems and be ready with suggestions and/or solutions.
- ❑ Actively review how things went with your customer. Was your time with the customer high quality for both of you? Did your conversation with the customer meet company standards, requirements and expectations? Did the customer walk away satisfied? If not, what could you have done differently?

SKILL (CC3): COMMITMENT TO QUALITY

**TASK (CC3.2): Proactively helps coworkers for the purpose of increasing overall quality of company operations. (11)**

- ❑ If you see that a team member is having difficulty, help out. Offer advice, assistance, and/or encouragement. Be ready to modify your own time commitments in order to help out your coworkers.
- ❑ It is good to help a team member out, but always keep in mind the needs of the business. For example, a team member may want to leave early and ask you to cover, but if by helping out the team member business suffers (e.g., there aren't enough people to help out all the customers), then the team member should stay.
- ❑ Recognize that when giving guidance to peers, it should be provided in a timely way, be specific and done in a constructive manner.
- ❑ Take the initiative to offer help to your coworkers as needed, don't wait to be asked.
- ❑ Take the time to understand the roles and responsibilities of your coworkers. Doing so will enable you to better evaluate when to offer assistance.
- ❑ Make sure that others view you as easy to approach and helpful.
- ❑ Encourage others to ask you for assistance and advice.
- ❑ Seek opportunities to work with people from other departments. Doing so will make you more effective in obtaining help for your customers and/or for directing your customers to needed help.
- ❑ Try to see issues and situations from the perspective of your coworkers before you ask them for assistance or place demands on them for help.

SKILL (CC3): COMMITMENT TO QUALITY

**TASK (CC3.3): Voice, body language, and attitude communicate to the customer that satisfying the customer's need is of highest importance. (12)**

- ❑ If you are approached by a customer with a complaint, make your own voice and body language show the customer that you care. Treat the customer as you would like to be treated if the situations were reversed.
- ❑ Encourage the complaining customer to thoroughly describe the problem, and at all times when the customer is talking display an attitude of interest and listening. You want that customer to feel that you care and will do something to resolve the problem.
- ❑ Make every effort to keep a face to the customer that indicates an earnest desire to help.
- ❑ Even when you are sure that the customer is incorrect in his/her complaint, do not point out the customer's error. Rather, make sure that you display to the customer only the most heartfelt desire to make it right.
- ❑ Show the customer how much you care by encouraging the customer to try new products and services. This not only benefits your company, but also helps the customer by providing them with new experiences.
- ❑ Remember that your customers have different needs. Some may be very concerned about price, others about quality. Through questioning, try to determine the customers concerns and then match their needs to company offerings.
- ❑ What may be an effective way to deal with one customer may not be effective in dealing with another customer. For example, some customers need lots of personal attention, while others want little or no personal attention wanting only to have their concerns addressed. Be sensitive to the customer's needs.
- ❑ Recognize the need to show your concern for your customer's problems. Customers will react positively if they feel that you are honestly interested in helping them. In most cases, a customer will tell you how you can help them if you allow them the opportunity to express their concerns.
- ❑ Avoid making one-sided speeches to your customers. If your customer comes to you with a complaint or concern, they can best be helped by listening to them rather than talking at them. Once you have all the fact, answer them by solving their problem.

SKILL (CC3): COMMITMENT TO QUALITY

**TASK (CC3.4): Balances own work schedule against customer needs; willingly makes adjustments. (13)**

- ❑ Remember, YOU are ultimately responsible for keeping the customer satisfied. If this means interrupting your own plans (e.g., putting aside the inventory that you MUST finish before end of shift) then do so and smile while you are doing it. The customer must not feel that he/she is interrupting you at your work.
- ❑ Learn to approach your customer's without having to force them to ask you for assistance. A customer in need of your help will often indicate that they want your assistance through subtle cues and body language. For example, you may see a customer looking upset, lost, or confused. Approach the customer and offer your assistance.
- ❑ Occasionally it may be necessary to go beyond what you normally consider your job duties. For example, you may be busy with an important task that needs to be completed before the day is over when you spot a customer needing assistance. It should be another's job to take care of the customer, but all others are busy. At this point you should set aside your own task and see to the customer's needs.
- ❑ In situations where it is necessary to refer the customer to another employee for assistance, and when time demands permit, escort the customer to the other employee and make appropriate introductions.
- ❑ Bear in mind that many customers feel uncomfortable asking for help and that you may need to actively encourage them to ask questions. Assure them that you are there to provide information as well as assistance.
- ❑ Take ownership of the customer's problem and exceed their expectations when resolving the problem. Doing so will provide you with a sense of satisfaction at a job well done, and increase customer loyalty.
- ❑ There is always a balance between what you need to get done during your shift and the demands that customers make upon your time. Consider the impact of helping the customer on your own schedule of what you need to accomplish. Sometimes it is possible to satisfy the customer without changing your own schedule.
- ❑ Remember that there are cultural differences among your customers. For some cultures, it is the most natural thing in the world to come up to an employee, interrupt the employee at work, then demand to be helped. For other cultures, interrupting someone at work would be considered rude. Instead, they will provide you with non-verbal cues that they need help, and expect you to come to them and offer assistance. They could get upset if you do not respond to their cues. Be alert for these non-verbal cues. Don't assume that since they aren't asking you for anything that they don't need your help.

SKILL (CC3): COMMITMENT TO QUALITY

**TASK (CC3.5): Determines customer need and improves customer relations by “listening” to customer comments and requests. (14)**

- ❑ Sometimes it is necessary to “listen” between the lines of customer comments and requests. Note the customer’s body language. Often the customer just wants help and may be expressing the request poorly. Find out what the customer really needs and do what you can to respond to that need.
- ❑ Recognize that in order to be of assistance, you must first understand the needs and concerns of your customers.
- ❑ Ask the customer questions to determine potential needs and interests, and then talk to the customer about the products/services that you think best match the customer’s needs.
- ❑ When determining a customer’s needs, try to ask questions that require the customer to explain. You will gain useful information from questions such as, “What do you need the product for?” or “How often do you need the product?” or “How do you intend to use the product?”
- ❑ Keep in mind that it is sometimes useful to restate in your own words what you see as the customer’s description of his/her needs. This helps prevent misunderstandings and ensures that your recommendations are on target.
- ❑ Never send the customer away frustrated. You are responsible for the customer’s satisfaction, regardless what past history that customer has with your company. Be friendly and courteous and help the customer to find the information that he/she seeks.
- ❑ Avoid the temptation to try to explain the cause of the problem (e.g., “I wasn’t here last week so I don’t know what happened.”) or recommend a solution without knowing all the facts.
- ❑ Always evaluate your performance. Did you resolve the customer’s issue in a quick and effective manner? Could you have done better?