Customer Service

Training Manual
Corporate Training Materials
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Module One: Getting Started

Each and every one of us serves customers, whether we realize it or not. Maybe you’re on the frontlines of a company, serving the people who buy your products. Perhaps you’re an accountant, serving the employees by producing their pay checks and keeping the company running. Or maybe you’re a company owner, serving your staff and your customers.

This workshop will look at all types of customers and how we can serve them better and improve ourselves in the process.

Pre-Assignment Review

The purpose of the Pre-Assignment is to get thinking about what you are doing now to provide customer service and what you can do to improve your performance in the future. Ask yourself:

- What contribution do you make to customer service?
- What would you like to change so that you could provide better customer service?
- What are your customer service strengths?
- What are your customer service weaknesses?
- Please list three things that you would like to get out of this workshop.

**Workshop Objectives**

Research has consistently demonstrated that when clear goals are associated with learning, the learning occurs more easily and rapidly. With that in mind, let’s review our goals.

By the end of this workshop, you should be able to:

- State what customer service means in relation to all your customers, both internal and external
- Recognize how your attitude affects customer service
- Identify your customers’ needs
- Use outstanding customer service to generate return business
- Build good will through in-person customer service
- Provide outstanding customer service over the phone
- Connect with customers through online tools
- Deal with difficult customers
Module Two: Who We Are and What We Do

Before we get started, we need to think about whom our customers are and what customer service is all about. We also need to think about whom in our organization provides customer service. The simple answer to that question is: everyone.

If you get everybody in the company involved in customer service, not only are they “feeling the customer” but they’re also getting a feeling for what’s not working.

Alice MacDougall
Who Are Customers?

A customer is, in this day and age, anyone who uses a service. Although this has its logical extremes – you will find few people who are overjoyed by the idea of being a customer to a doctor, or their children a customer of their school, that description is as complete as you are likely to find for the term. Therefore everyone who relies on you to do a job to make their own job, their life or their use of a product easier is technically one of your customers. Above and beyond that there are, naturally, different echelons of customers – internal and external, corporate and personal, regular and occasional. These are always people that you will be well-advised to keep happy, so customer service is an important – indispensable, one might say – element of any job in which you have customers.

If, for example, you work in one branch of a department store, and receive a call from someone working in a sister branch of the same store wondering if you have in stock a particular item – one which their branch has run out of, for example, then that individual technically, and temporarily, becomes a customer to you. They want something and are hoping that you can deliver it. To do your job the way one would hope, you will go to whatever lengths are possible in order to provide the best service possible to whoever needs it from you.

Of course, the most regular customers tend to be the external customers who provide the bread and butter of any business, the regular day-to-day custom that drives the profits and income of a company. It is also these customers who will, by word of mouth and other means bring your business to the attention of other potential customers. Their role in a business’s success is essential, and these customers should be the immediate concern of any business. Ensuring that these customers are satisfied will make the difference between success and failure for any company.
**External Customers**
External customers are anyone outside your company that you interact with — not just the people who buy goods or services from you.

External customers are what can be considered ‘traditional’ customers:

- They take our products and services and pay for them
- They exist ‘outside’ the confines of our own organization
- They are open to approach from our competitors
- They may not always be dependent upon us for products and services and may switch away to our competitors

**Internal Customers**
Internal customers include anyone in your organization who relies on you for services, resources, or information.

Providing excellent customer service to internal customers sets a positive tone for all personal interactions. If internal customers receive excellent customer service every day, they will consider this the norm. If they interact with external customers, they are likely to treat those customers the way they have been treated. Excellent customer service, like most types of human behavior, is contagious.

The quality of service you provide to internal customers ultimately affects the quality of service your company provides to external customers. Even if you never interact with someone outside your company, you are still engaged in customer service.

Internal customers are the people in our own organization who are dependent on us for
What Is Customer Service?

Customer service is one of the true business essentials. Everyone remembers the bad customer service they have had, and most will also remember instances of good customer service. The importance of customer service is recognized by all successful businesses, because it is possibly the number one element in customer retention. If you want to ensure that you get repeat business, looking out for the wishes and needs of your customer base is simple essential. How you go about providing it is up to you, but there are certain elements which remain the same whatever the nature of your business. These are the principles of good customer service.

Whenever a customer makes a purchase, they will have priorities as to what makes their experience a positive or negative one. Obviously the first priority is that they get whatever they have purchased from the point of purchase to their home. If it is a small item that they can take with them, the business’s responsibility is to see to it that the item is packaged and presented in a manageable, portable fashion with a minimum of waiting. However, customer service begins before this. When a customer