

# Customer Service Workbook #1

## *Get to Know your Customer*



### I. Part 1: Greet Your Customers in A Winning Way

1. Acknowledge the customer's presence
  - a. Within the first \_\_\_\_\_
  - b. If customer waits 30-40 seconds, feels like 3-4 minutes
  - c. First \_\_\_\_\_ is hard to change
  - d. Make eye \_\_\_\_\_
  - e. If working with customer and new one walks in \_\_\_\_\_ yourself briefly to tell the new customer you will be right with them.
2. Project a \_\_\_\_\_ and friendly image
  - a. Dress \_\_\_\_\_
  - b. Act alert & courteous
  - c. Sincere and \_\_\_\_\_ in customer
  - d. Smile with eyes and mouth
3. Create an \_\_\_\_\_ for discussion
  - a. Don't ask \_\_\_\_\_ questions like "May I help you?" You will get a response like, "No thank you" or "I'm just looking."
  - b. Only \_\_\_\_\_ comments
4. Be \_\_\_\_\_, but not pushy
  - a. It's what you say \_\_\_\_\_ how you say it.
  - b. Don't push \_\_\_\_\_ too far.
  - c. Be sincere and honest when telling a customer they look nice
  - d. Positive \_\_\_\_\_ created by:
    - i. Complementing the customer's taste
    - ii. Assuring the customer he's the expert
    - iii. Showing your own knowledge of purchases that are worthwhile
5. Include the \_\_\_\_\_ shopping party
  - a. Offer customer's friend a chair to sit while waiting
  - b. Offer \_\_\_\_\_ a toy for mom to finish shopping (*Always ask permission from parents first!*)
  - c. Don't \_\_\_\_\_ with parent reprimanding child or couple arguing over a purchase

**\*\*\*create customer loyalty: bring the \_\_\_\_\_ back to the store!**

**\*\*\*build trust: by responding to their needs and given information needed**

**\*\*\*tip: 45% of customers say they are likely to spend more if the sales associate is helpful. 18% of customers will walk out of store if they don't like the attitude of sales associate**

# Build Relationships, One Step at a Time



## II. Part 2: Be Observant

- a. If the customer is in a \_\_\_\_\_ you should give \_\_\_\_\_ & efficient service.
- b. If the customer is \_\_\_\_\_ - offer service but give space to browse
- c. If the customer is checking price tags-make them aware of specials
- d. If the customer is \_\_\_\_\_ the area looking for \_\_\_\_\_-give directions
- e. If the customer is looking for/at a clock they might be \_\_\_\_\_, "I'll assist you in finding the item."
- f. Difficulty \_\_\_\_\_ between items-ask questions to see why customer can't decide, then offer additional info

## III. Part 3: Determine a Customer's Needs

1. Customer's \_\_\_\_\_ for a product or service can be conscious or subconscious
2. They either know \_\_\_\_\_ what they want or only have a \_\_\_\_\_ idea
3. Help with unspoken needs like explaining the \_\_\_\_\_ (extended product feature)
4. Observe and Ask \_\_\_\_\_
5. Know the questions to ask to figure out wants, \_\_\_\_\_ and buying motives
6. Open ended questions:
  - a. Who, \_\_\_\_\_, when, where, how, why
  - b. \_\_\_\_\_ is the special occasion?
  - c. \_\_\_\_\_ are you shopping for?

## IV. Part 4: Keep the Lines of Communication Open

1. Know the questions \_\_\_\_\_ to ask
  - a. Avoid \_\_\_\_\_ asking customer how much they want to spend
  - b. You will need to know a \_\_\_\_\_ so you don't waste their time with too expensive items

*Examples of \_\_\_\_\_ to ask include:*

"What clothing lines do you usually prefer?"

"What brand fridge do you have at home?"

2. \_\_\_\_\_ questions that force customers to choose options before they have reviewed them
3. After you've asked a question, make sure you \_\_\_\_\_ to the customer's answer
4. Show \_\_\_\_\_ by saying, "I know where you're coming from." Or "I understand."
5. Know the products' \_\_\_\_\_, brand, color, size which helps meet the customer's need

## V. Part 5: Fit the Products to the Customer

1. Find the right fit \_\_\_\_\_ of product or service involved
2. Sometimes “fit” can be a \_\_\_\_\_ issue – be careful.
3. Never \_\_\_\_\_ to a customer after asking what size
4. Take cues (hints) from \_\_\_\_\_ to find out size.  
You can ask, “Have you ever worn this brand before? What size fit the best?”
  - a. Bring several sizes out because brands can vary in size
5. Don’t \_\_\_\_\_ a person or say anything about sizes being too small.
6. Service \_\_\_\_\_-they may need a different size:
  - a. Special-order merchandise
  - b. Customizing
  - c. Alterations
  - d. Accessories

## VI. Part 6: Offer Alternatives

1. Offer \_\_\_\_\_ if you don’t have what the customer wants (ask permission)
  - a. Different color
  - b. Comparable brand
  - c. Similar model
2. After the customer agrees to see alternatives they will either:
  - a. Best case- they like the alternative – make \_\_\_\_\_
  - b. Worst case- customer feels you \_\_\_\_\_ to help them
3. Don’t spoil the customer’s \_\_\_\_\_ with the hard sell technique.
4. If you do not have what the customer \_\_\_\_\_, or an alternative, or you can’t special order it then the last choice is to send them to a \_\_\_\_\_.  
**Call the competitor to see if they have it and give the customer \_\_\_\_\_.**
5. If you work in a large store and you do not carry an item in your \_\_\_\_\_ walk the customer to the department that \_\_\_\_\_ have the item

## I. Part 1: Make Shopping an Enjoyable Experience

1. An attractive \_\_\_\_\_ environment and \_\_\_\_\_ helpful sales associate make enjoyable shopping experience
2. Provide \_\_\_\_\_ to the customers
  - a. Ex. At bookstore, large overstuffed chairs to sit & read

## II. Part 2: Be Resourceful

*(List of resources)*

1. Gift wrap
2. Mailing service
3. ATM available
4. Gift registry
5. Employee speaks another \_\_\_\_\_
6. Storage lockers
7. Day nursery
8. Store catalog

### III. Part 3: Inform Customers of Additional Sources

*(List of service extras)*

1. Alterations
  - a. Ex. – wedding dress
  - b. Explain any fees
  - c. Arrange for service
  - d. Make sure altered items \_\_\_\_\_
2. Assembly
  - a. Ex. Computer desk
  - b. Some people want it done by a \_\_\_\_\_
3. Installation
  - a. Ex. Washing machine
  - b. Advertise installation services
4. Special events
  - a. Clearance sales
  - b. Product demonstrations
  - c. Workshops
5. Payments plans



- a. \_\_\_\_\_-a deposit that holds the item until it is paid in full over months
  - b. In-house accounts- credit cards managed by the store itself, account holders get exclusive \_\_\_\_\_
  - c. Interest-free credit purchases-if the purchase is paid in full by a certain date then \_\_\_\_\_ will be added.
6. Frequent shopper programs
    - a. Trend in \_\_\_\_\_
    - b. Example of coffee shop: establish \_\_\_\_\_ by making the tenth latte free
  7. Mailing lists
    - a. To send you flyers or \_\_\_\_\_ coupons
    - b. Email \_\_\_\_\_
  8. Gift \_\_\_\_\_
    - a. Wedding, baby shower, housewarming gifts
  9. Gift wrapping
  10. Delivery
    - a. Bulky or \_\_\_\_\_ items

*\*tip: keep a written (or computerized) client record of customer's extras, use this to provide \_\_\_\_\_ service when they return*

#### IV. Part 4: Accommodate Customers with Disabilities

1. A person who is
  - a. Hearing impaired
    - Not all read lips
    - Use body language & \_\_\_\_\_
  - b. Sight impaired
    - Don't shout – ever.
  - c. Uses a wheelchair
    - Sit down & get eye level with them
  - d. With \_\_\_\_\_ disabilities
    - Explain complex tasks
2. 2/3 of \_\_\_\_\_ are not obvious
3. 15%-20% of Americans have some sort of \_\_\_\_\_.
4. Don't say "The blind customer", say "The customer who is blind."
5. Wheelchair \_\_\_\_\_, large \_\_\_\_\_, easy door access (look for potential problems)
6. Don't rush \_\_\_\_\_ (working with a customer who is disabled may take longer)
7. If you don't understand the customer, don't fake it. (ask for clarification, even get co-worker to help you)



## V. Part 5: Balance Your Service to In-Store and Phone Customers

1. Excuse yourself to answer the phone
  - a. Excuse yourself \_\_\_\_\_, customers don't like interruptions
  - b. Reassure the customer you will be \_\_\_\_\_
  - c. Ask the customer to \_\_\_\_\_ while you finish with the in-store customer.
2. Answering the phone politely and \_\_\_\_\_
  - a. Answer \_\_\_\_\_
  - b. Identify yourself and \_\_\_\_\_
  - c. Never sound preoccupied or \_\_\_\_\_
  - d. Tip: speak clear into mouthpiece and not rushed
3. Putting a customer \_\_\_\_\_
  - a. Do not say "please hold"!!!
  - b. Wait for the customer's \_\_\_\_\_, they may just need to know what time you close.
  - c. If it will take longer put on hold or if needed ask if you can give them a call back.
4. Calling back if necessary
  - a. Actually \_\_\_\_\_ and in timely manner
  - b. Get the customer's name, phone number and a good time to call them back.
5. Being \_\_\_\_\_ and accurate
  - a. Give \_\_\_\_\_ info - when the customer drives there you should have what you said you have.
  - b. Telephone customers have specific needs!! (know what they want)



## VI. Part 6: Build Relationships over the Phone

1. Offering \_\_\_\_\_ information and \_\_\_\_\_
  - a. Anticipate unspoken needs and offer \_\_\_\_\_ info
  - b. Establish yourself as a "can do" person over the phone so they \_\_\_\_\_ can ask for you when they come in. Give them your name.
  - c. Suggest additional ways you can help the caller
  - d. Don't \_\_\_\_\_ the conversation.
2. Scheduling in-store appointments
  - a. You can suggest \_\_\_\_\_ an appointment to help make the customer's selection
  - b. If they need more info, offer to fax or email info
3. Showing your appreciation
  - a. An in store customer is just as \_\_\_\_\_ as a phone customer
  - b. Thank the customer for \_\_\_\_\_ and for their purchase

## VII. Part 7: Make and Keep Commitments

- A. Follow \_\_\_\_\_ on promises:
  - a. Promise to call, do so
  - b. Offer to check merchandise availability, be \_\_\_\_\_ & accurate
  - c. Fill orders \_\_\_\_\_
  - d. Follow up on \_\_\_\_\_
- B. If you promise to locate out of stock item for a customer:
  - a. Ask the customer when they want to be \_\_\_\_\_
  - b. Take down necessary information
  - c. Specify \_\_\_\_\_ he will hear from you
- C. Never make \_\_\_\_\_ you can't keep
- D. Contact at the \_\_\_\_\_ time shows you are:
  - a. Considerate, caring, & reliable
  - b. Prevents customer from looking \_\_\_\_\_ for product
- E. If can't keep your promise call and \_\_\_\_\_ customer
- F. Company policy:
  - a. Explain what you can't do
  - b. If your store will allow it but it is an \_\_\_\_\_, let the customer know it was an exception *exception= not standard practice*

## VIII. Part 8: Complete Special Orders

- 1. Making special orders can \_\_\_\_\_ a customer's loyalty. People are busy and prefer "one-stop shopping"
- 2. Special orders should not be a \_\_\_\_\_. If you can't do special orders with your \_\_\_\_\_ find out who does. Know the \_\_\_\_\_ books-products provided by manufacturers.
- 3. Know where to find \_\_\_\_\_ and policies & \_\_\_\_\_ for special orders
- 4. Keep a record of special orders & note on your calendar when to fill orders
- 5. Give timely \_\_\_\_\_ on your progress

# CUSTOMER SERVICE

- n. the assistance and advice provided by a company to those people who buy or use its products or services



# Customer Service Workbook #3 Build a Continuing Relationship



## I. Part 1: Honor Manufacturer's Warranties

1. Warranties \_\_\_\_\_ customers in case of \_\_\_\_\_, defect, or other problems.
2. Some companies offer additional " \_\_\_\_\_ " guarantees.
3. Some companies offer " \_\_\_\_\_ " or service contracts for a fee
4. The \_\_\_\_\_ is the first point of contact when a customer is not satisfied with a product. Therefore you must be \_\_\_\_\_ with all warranties.
5. Warranties can be used as a tool to \_\_\_\_\_ the customer about a product's \_\_\_\_\_, performance, and \_\_\_\_\_.
6. \_\_\_\_\_ only cover the defect described in it.
7. Make a file or folder containing copies of all warranties \_\_\_\_\_ and have information available as to how to contact manufacturers.
8. Things you can do as extra service regarding warranties
  - a. Help customer fill out \_\_\_\_\_.
  - b. Make a follow-up call to make sure merchandise was delivered on time and in good condition.
  - c. Call to see if there are problems with \_\_\_\_\_ or assembly.
9. If a customer asks for an exception to a warranty
  - a. Get \_\_\_\_\_ from immediate supervisor
  - b. If approved, explain to the customer \_\_\_\_\_ what you are doing
10. Questions you should ask supervisor before working with a customer:
  - a. Does the company offer exceptions?
  - b. Do exceptions \_\_\_\_\_ on the type of customer? (past history, previous returns)
  - c. Who \_\_\_\_\_ what exceptions can be made?
11. Common warranty questions you need to know how to answer:
  - a. Where will this item be repaired? How long will it take?
  - b. Does the store have a repair department? Or are things sent off-site?
  - c. Does the store carry \_\_\_\_\_ parts? Can they be ordered through the store?



## II. Part 2: Know your company's return policy

1. Receive returns \_\_\_\_\_
2. Make policy known – give \_\_\_\_\_ information
  - a. Provide clear \_\_\_\_\_ to associates and customers (should be posted)
  - b. Specify any special \_\_\_\_\_ to the customer  
(90 day deadline, no returns on bathing suits, no return without receipt etc.)
  - c. Outline the \_\_\_\_\_ for processing a return
3. Look for \_\_\_\_\_ if a customer can't get a return (exchange?)
4. Smooth the way/direct customer to returns
5. There may be circumstances beyond your control – explain to customer
6. Be a helpful go-between (angry customers)

## III. Part 3, 4, & 5: Handle Customer Complaints Graciously

1. Thank the customer for bringing problem to your \_\_\_\_\_.
2. Hear the problem- listen \_\_\_\_\_. Then, ask the customer how they would like the problem to be solved.
3. Apologize for the inconvenience the customer has \_\_\_\_\_.
4. Keep your goal in mind: To keep the customer \_\_\_\_\_ NOT to decide who is right or wrong.
5. Solve the problem or find someone who can
6. You may be able to fix the problem yourself, or you may have to refund the purchase price, fix or repair the item, or substitute one product for another. Make sure you have the \_\_\_\_\_ to carry out a particular solution. Keep records of what you did (especially returns, replacements, or repairs). You may need to make a follow-up call to calm the feelings of some customers or to check the replacement or repair.

# Customer Service Workbook #4 Go the Extra Mile



## I. Part 1: Conduct Customer Follow-Up

Not every purchase \_\_\_\_\_ follow-up. You should judge the situation and decide whether you need to follow up or not. Keep it professional. This is an effective way to make valuable contacts that may serve you in the future.

- a. Telephone message
  - i. Consider the most appropriate time and place to call
  - ii. Leave a \_\_\_\_\_ if necessary
- b. Thank you cards
  - i. Sending postcards to your \_\_\_\_\_ customers is a very effective and unobtrusive way to maintain your relationship, but be careful about postcards that others may read (gift purchase). Write a quick thank-you on store stationary or on the receipt.



## Part 2: Using Business Cards Artfully

Your business card not only tells the customer \_\_\_\_\_ you are, but also tells him that you are \_\_\_\_\_ about your work.

Business cards provide a way for customers to \_\_\_\_\_ you for future needs.

If your company does not \_\_\_\_\_ business cards, write your info on the back of sales \_\_\_\_\_, special order forms, or note cards.

Your business card should include the following:

- i. Your name, \_\_\_\_\_, telephone extension, job title, company's name, address, email, slogan (tagline), and logo (image)

Additional tips:

- ii. Write "Hope to see you at our anniversary sale!" on a flyer/ postcard, sign name and put it in bag.
- iii. Write "Call if you have any questions" on the \_\_\_\_\_ and add your name and phone number.
- iv. Make \_\_\_\_\_ business cards (if allowed by company policy)

## II. Part 3: Business Card Etiquette

- A. Keep it clean/neat. It is a reflection of you. Make sure it projects a \_\_\_\_\_ image. No tears, folds, dirt, smudges.
- B. Always enclose your card in thank you cards or other \_\_\_\_\_ correspondence.
- C. Don't \_\_\_\_\_ with your card (make sure customer has the card before leaving)
- D. Never ask for a customer's business card unless you've \_\_\_\_\_ your own card first. Some people don't have any or uncomfortable using them for \_\_\_\_\_ business. Only ask for a customer's business card if it provides a \_\_\_\_\_ to the customer. In most cases, wait for the customer to offer it. Here are reasons to ask for the business card:
  1. Customer wants to know about the performance of a \_\_\_\_\_ and you need to research the information and get back to him.
  2. Remind him about an \_\_\_\_\_ sale
  3. You are out of a specific item a customer wants and you offer to call him when a new shipment comes in.
  4. You cannot solve a customer's problem, but offer to call him back if you find out another solution.
  5. An item is being altered or repaired or a part was ordered and you need to call the customer when it is ready or the part is available.
- E. Treat the card with \_\_\_\_\_.
- F. Use the back of the card to make notes about the customer's preferences, special requests, etc.
- G. Make sure to \_\_\_\_\_ the customer if you can use the number or email address.

### III. Part 4: Maintain Key Information on Customers

- a. Keep a client record/profile (a notepad, computer file, card file, folder, or binder)
- b. Basic \_\_\_\_\_ include the following
  - i. Name, address, telephone, occupation (or hobbies, activities, projects, interests)
  - ii. Date and type of first purchase or contact. What did he buy? What was he shopping for?
  - iii. Preferences or specifications (size, color, label, brand name)
  - iv. Special considerations (allergies? Is the customer a traveler? A night shift worker?)
  - v. Does the customer prefer to have goods delivered, assembled, & serviced regularly?
- c. Keep it up to \_\_\_\_\_ and review your lists regularly to take advantage of sales possibilities should new items arrive that match the customer's particular interests.
- d. Keep the information \_\_\_\_\_. Never share with anyone, even co-workers, without the customer's permission.
- e. Confidential \_\_\_\_\_ include customer's address, phone number, credit card numbers, sizes, times the customer is home for delivery, birth date, occupation, or place of business.

### IV. Part 5: Offer Personal Shopper Services

- a. Get to know your customer. This gives you an opportunity to know the customer and his/her shopping preferences to become a personal shopper. (I'm going on vacation to the beach, pick out some clothes for me")
- b. Schedule personal shopper appointments with the customer:
  - i. To show your customer what you have selected for him/her
  - ii. For shoppers who want your undivided attention
  - iii. For customers who have busy or odd schedules and are always in a hurry
  - iv. For customers who rely on you to help them with special gift purchases
- c. You may have to stay late or come in early to accommodate the customer. Check store policy before making appointments. Always keep records of your personal shopper appointments and what items were purchased or discussed. Keep appointments in a planner or calendar so you won't miss them.

# Customer Service Workbook #5 Explaining Features & Benefits



## I. Learning About the Products You Sell

- a. Become an \_\_\_\_\_ on what you're selling
- b. Use the following to rely on:
  - i. *Labels & packaging*: examples
    1. 100% cotton is *fiber content* (ex. Know if clothes will shrink, color fade, or can be put in dryer)
    2. Machine wash cold is *care instructions*
    3. *Serving size* is servings per bag is 2
    4. *Ingredients* is the products contents
    5. *Nutritional information* is vitamin, fat, cholesterol, dietary fiber
    6. Cosmetics, toiletries, & drugs require a list of ingredients & precautions
  - ii. *Vendors/suppliers*: product manufacturer offers brochures or videos on products they sell
- c. Tip: be sure you are "speaking the same language" as your \_\_\_\_\_. Don't use \_\_\_\_\_ terms they don't understand.

## II. Identifying Product Features

- d. Size, color, style, model, composition, function, brand, price
- e. *Feature*-what the \_\_\_\_\_  
\* \_\_\_\_\_ determines feature
- f. *Benefit*-what the product can do for the \_\_\_\_\_  
\* \_\_\_\_\_ determines benefit
  - Feature: neutral colors: beige, ivory, gray
  - Benefit: goes with everything, doesn't stand out, low maintenance
  - Feature: 10 year warranty
  - Benefit: no charge for repairs for 10 years
- g. When a customer becomes \_\_\_\_\_ to using your product/service- brand loyal

### III. Demonstrating Product Features

- h. Allow the customers to \_\_\_\_\_, touch, taste, or \_\_\_\_\_ the product (especially if they don't know how to use it)
- i. Look for \_\_\_\_\_ to let customers \_\_\_\_\_ product or service
  - i. Food (let taste), appliance (show how to use) furniture (let sit or lie in), cosmetic (give samples)
  - ii. Make sure product is working \_\_\_\_\_ before demonstrating

Tip: always show products under good lighting (near a window or outside the store is good)

### IV. Explaining How the Customer Will Benefit

- j. Before closing a sale- \_\_\_\_\_ if they would like any \_\_\_\_\_ to go with it
- k. Customers want products or services to do one or more of the following:
  - i. \_\_\_\_\_ for the basic life-sustaining needs
  - ii. Save them time, \_\_\_\_\_, or money
  - iii. Improve self-image or \_\_\_\_\_
  - iv. Enhance or maintain their other \_\_\_\_\_

### V. Establishing the Perfect Match

- l. Match the customer's needs/wants by \_\_\_\_\_ what benefits he/she wants

*Tip: ask questions that begin with who, what, when, where, how, or why so you get an open-ended answer!*

### VI. Responding to customer concerns

- m. The first step in \_\_\_\_\_ is to make sure you understand correctly (ask questions)
- n. Most objections/concerns can be addressed in 3 ways:
  - i. Provide more info
    - 1. Remind how product \_\_\_\_\_ their needs
    - 2. Address concerns and give additional info
  - ii. Make it easier to buy
    - 1. Layaway
  - iii. Suggest an alternative
    - 1. Suggest \_\_\_\_\_ products or \_\_\_\_\_ brands

## VII. Ensuring customer satisfaction

- o. Get as much \_\_\_\_\_ as possible
  - p. Knowing your goods & services will make you an \_\_\_\_\_
  - q. To \_\_\_\_\_ the odds of making contact with your customers:
    - i. Make sure your customers know how to contact you (make sure they know your name)
    - ii. Make sure you know how to \_\_\_\_\_ customers (especially for \_\_\_\_\_ items & delivered items)
    - iii. Provide customers with an \_\_\_\_\_ way to give you feedback (forms or survey)
      - 1. Creates \_\_\_\_\_ relationship
- Tip: before giving feedback card, write thank you and your name on it*