

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 **10 seconds**
 - b. If customer waits 30-40 seconds, feels like 3-4 minutes
 - c. First impression is hard to change
 - d. Make eye contact
 - e. If working with customer and new one walks in excuse yourself briefly to tell the new customer you will be right with them.
2. Project a professional and friendly image
 - a. Dress professional
 - b. Act alert & courteous
 - c. Sincere and interested in customer
 - d. Smile with eyes and mouth
3. Create an opening for discussion
 - a. Don't ask closed ended questions like "May I help you?" You will get a response like, "No thank you" or "I'm just looking."
 - b. Only appropriate comments
4. Be reassuring, but not pushy
 - a. It's what you say and how you say it.
 - b. Don't push humor too far.
 - c. Be sincere and honest when telling a customer they look nice
 - d. Positive impression 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 entire shopping party
 - a. Offer customer's friend a chair to sit while waiting
 - b. Offer kids a toy for mom to finish shopping (*Always ask permission from parents first!*)
 - c. Don't interfere with parent reprimanding child or couple arguing over a purchase

*****create customer loyalty: bring the customer 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 hurry you should give quick & efficient service.
- b. If the customer is browsing- 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 scanning the area looking for merchandise-give directions
- e. If the customer is looking for/at a clock they might be in a hurry, "I'll assist you in finding the item."
- f. Difficulty deciding 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 desire for a product or service can be conscious or subconscious
2. They either know exactly what they want or only have a general idea
3. Help with unspoken needs like explaining the warranty (extended product feature)
4. Observe and Ask Questions
5. Know the questions to ask to figure out wants, needs and buying motives
6. Open ended questions:
 - a. Who, what, when, where, how, why
 - b. What is the special occasion?
 - c. Who are you shopping for?

IV. Part 4: Keep the Lines of Communication Open

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

Examples of good questions to ask include:

"What clothing lines do you usually prefer?"

"What brand fridge do you have at home?"

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

V. Part 5: Fit the Products to the Customer

1. Find the right fit regardless of product or service involved
2. Sometimes “fit” can be a sensitive issue – be careful.
3. Never react to a customer after asking what size
4. Take cues (hints) from customer 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 judge a person or say anything about sizes being too small.
6. Service Extras-they may need a different size:
 - a. Special-order merchandise
 - b. Customizing
 - c. Alterations
 - d. Accessories

VI. Part 6: Offer Alternatives

1. Offer alternatives 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 purchase
 - b. Worst case- customer feels you tried to help them
3. Don’t spoil the customer’s experience with the hard sell technique.
4. If you do not have what the customer wants, or an alternative, or you can’t special order it then the last choice is to send them to a competitor.
Call the competitor to see if they have it and give the customer directions.
5. If you work in a large store and you do not carry an item in your department walk the customer to the department that does have the item

I. Part 1: Make Shopping an Enjoyable Experience

1. An attractive retail environment and friendly helpful sales associate make enjoyable shopping experience
2. Provide extras 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 language
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 fits the need
2. Assembly
 - a. Ex. Computer desk
 - b. Some people want it done by a professional
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. Layaway-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 discounts
- c. Interest-free credit purchases-if the purchase is paid in full by a certain date then no interest will be added.
6. Frequent shopper programs
 - a. Trend in retailing
 - b. Example of coffee shop: establish customer loyalty by making the tenth latte free
7. Mailing lists
 - a. To send you flyers or discount coupons
 - b. Email list
8. Gift registry
 - a. Wedding, baby shower, housewarming gifts
9. Gift wrapping
10. Delivery
 - a. Bulky or heavy items

**tip: keep a written (or computerized) client record of customer's extras, use this to provide personalized 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 & note writing
 - b. Sight impaired
 - Don't shout – ever.
 - c. Uses a wheelchair
 - Sit down & get eye level with them
 - d. With developmental disabilities
 - Explain complex tasks
2. 2/3 of disabilities are not obvious
3. 15%-20% of Americans have some sort of disability.
4. Don't say "The blind customer", say "The customer who is blind."
5. Wheelchair access, large aisles, easy door access (look for potential problems)
6. Don't rush transactions (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 politely, customers don't like interruptions
 - b. Reassure the customer you will be right back
 - c. Ask the customer to hold while you finish with the in-store customer.
2. Answering the phone politely and professionally
 - a. Answer promptly
 - b. Identify yourself and department
 - c. Never sound preoccupied or rude
 - d. Tip: speak clear into mouthpiece and not rushed
3. Putting a customer on hold
 - a. Do not say "please hold"!!!
 - b. Wait for the customer's response, 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 call back and in timely manner
 - b. Get the customer's name, phone number and a good time to call them back.
5. Being prompt and accurate
 - a. Give accurate 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 additional information and services
 - a. Anticipate unspoken needs and offer additional info
 - b. Establish yourself as a "can do" person over the phone so the customer can ask for you when they come in. Give them your name.
 - c. Suggest additional ways you can help the caller
 - d. Don't prolong the conversation.
2. Scheduling in-store appointments
 - a. You can suggest scheduling 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 important as a phone customer
 - b. Thank the customer for calling and for their purchase

VII. Part 7: Make and Keep Commitments

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

VIII. Part 8: Complete Special Orders

- 1. Making special orders can make or break a customer's loyalty. People are busy and prefer "one-stop shopping"
- 2. Special orders should not be a burden. If you can't do special orders with your vendor find out who does. Know the product books-products provided by manufacturers.
- 3. Know where to find special order forms and policies & extra charges for special orders
- 4. Keep a record of special orders & note on your calendar when to fill orders
- 5. Give timely update 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 protect customers in case of damage, defect, or other problems.
2. Some companies offer additional "customer satisfaction" guarantees.
3. Some companies offer "extended warranties" or service contracts for a fee
4. The salesperson is the first point of contact when a customer is not satisfied with a product. Therefore you must be familiar with all warranties.
5. Warranties can be used as a tool to reassure the customer about a product's quality, performance, and durability.
6. Limited warranties only cover the defect described in it.
7. Make a file or folder containing copies of all warranties offered 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 warranty card.
 - 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 installation or assembly.
9. If a customer asks for an exception to a warranty
 - a. Get approval from immediate supervisor
 - b. If approved, explain to the customer exactly what you are doing
10. Questions you should ask supervisor before working with a customer:
 - a. Does the company offer exceptions?
 - b. Do exceptions depend on the type of customer? (past history, previous returns)
 - c. Who determines 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 replacement parts? Can they be ordered through the store?

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

1. Receive returns graciously
2. Make policy known – give accurate information
 - a. Provide clear guidelines to associates and customers (should be posted)
 - b. Specify any special conditions to the customer
(90 day deadline, no returns on bathing suits, no return without receipt etc.)
 - c. Outline the procedures for processing a return
3. Look for alternatives 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 attention.
2. Hear the problem- listen carefully. Then, ask the customer how they would like the problem to be solved.
3. Apologize for the inconvenience the customer has experienced.
4. Keep your goal in mind: To keep the customer coming back 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 authority 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 requires 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 message if necessary
- b. Thank you cards
 - i. Sending postcards to your best 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 who you are, but also tells him that you are serious about your work.

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

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

Your business card should include the following:

- i. Your name, department, 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 assembly instructions and add your name and phone number.
- iv. Make your own 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 professional image. No tears, folds, dirt, smudges.
- B. Always enclose your card in thank you cards or other customer correspondence.
- C. Don't lead with your card (make sure customer has the card before leaving)
- D. Never ask for a customer's business card unless you've offered your own card first. Some people don't have any or uncomfortable using them for personal business. Only ask for a customer's business card if it provides a direct benefit 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 product and you need to research the information and get back to him.
 2. Remind him about an upcoming 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 respect.
- F. Use the back of the card to make notes about the customer's preferences, special requests, etc.
- G. Make sure to ask 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 records 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 date 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 confidential. Never share with anyone, even co-workers, without the customer's permission.
- e. Confidential information 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 expert 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 customer. Don't use technical terms they don't understand.

II. Identifying Product Features

- d. Size, color, style, model, composition, function, brand, price
- e. *Feature*-what the product can do
*manufacturer determines feature
- f. *Benefit*-what the product can do for the customer
*customer 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 dedicated to using your product/service- brand loyal

III. Demonstrating Product Features

- h. Allow the customers to smell, touch, taste, or operate the product (especially if they don't know how to use it)
 - i. Look for opportunities to let customers experience 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 properly 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- ask if they would like any accessories to go with it
- k. Customers want products or services to do one or more of the following:
 - i. Provide for the basic life-sustaining needs
 - ii. Save them time, effort, or money
 - iii. Improve self-image or status
 - iv. Enhance or maintain their other possessions

V. Establishing the Perfect Match

- l. Match the customer's needs/wants by figuring out 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 addressing customer concern 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 helps their needs
 - 2. Address concerns and give additional info
 - ii. Make it easier to buy
 - 1. Layaway
 - 2. Suggest similar products or comparable brands

VII. Ensuring customer satisfaction

- o. Get as much feedback as possible
 - p. Knowing your goods & services will make you an expert
 - q. To improve 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 contact customers (especially for expensive items & delivered items)
 - iii. Provide customers with an easy way to give you feedback (forms or survey)
 - 1. Creates long lasting relationship
- Tip: before giving feedback card, write thank you and your name on it*