



EFFECTIVE CUSTOMER SERVICE TOOLKIT

## INTRODUCTION

Customer service begins with mindset. Customer service is not a department or a function. Just like every person is in sales, every person is in customer service. Every interaction is a customer service moment. Systems and processes can't compensate for wrong mindsets and inappropriate attitudes. Use this toolkit to help you determine how well aligned your behaviors, strategies, and systems are so that you can focus your attention properly and propel your customer service forward.

**What Makes for Effective Customer Service? (Page 2)**

**What Happens When It Goes Wrong? (Page 4)**

**Job Aid 1: What's Your Customer Service Behavior Profile? (Page 5)**

**Tool 1: Examining Customer Service Strategies (Page 6)**

**Tool 2: Evaluating Customer Service Systems (Page 7)**

**Job Aid 2: Customer Service Diagnostic (Page 8)**

**Tool 3: Quit Taking It Personally (Page 10)**

## WHAT MAKES FOR EFFECTIVE CUSTOMER SERVICE?

**Behaviors, strategies, and systems** must work together to deliver winning customer service.



### Service Behavior:

- Transfers are warm.
- Service delivery style matches customer's needs.
- Associates are positive, informative, and helpful.
- Ask open-ended questions.
- Provide customers with options.
- Empower employees to create exceptional customer experiences and apply that latitude creatively.

### Service Strategies:

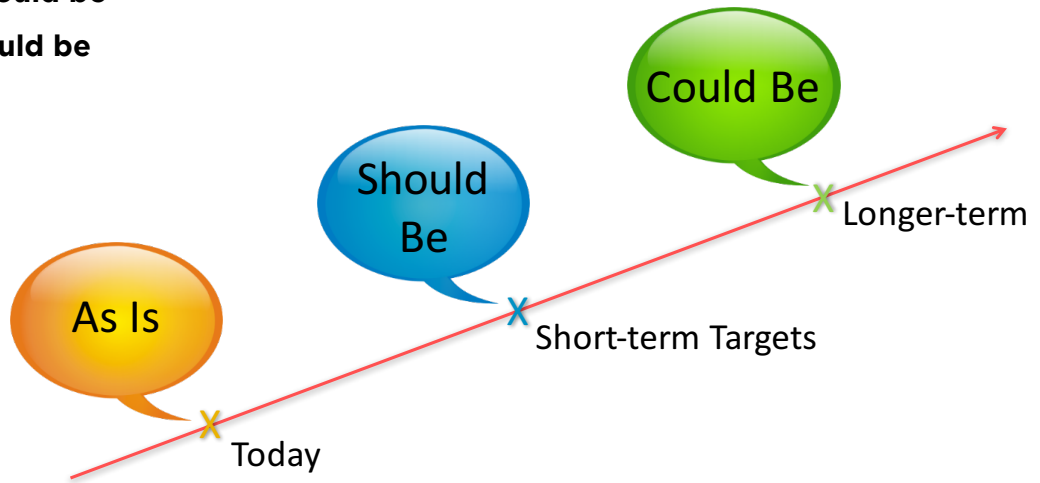
- Implement logical process flows (from the customer's perspective).
- Use techniques that prevent or clearly flag errors.
- Develop methods or devices to streamline steps in processes for the customers' benefit.

### Service Systems:

- Interdepartmental transactions are seamless to the customer.
- Processes are predictable and consistent from department to department.

Use the tools and job aids within this toolkit to assess where you are right now, so that you can assess what you need to improve to get where you want to be. Think of performance improvement as a 3-stage process:

- **As-is (today)**
- **Should be**
- **Could be**



AS IS	SHOULD BE	COULD BE
<p><b>Where we are right now...</b></p> <ul style="list-style-type: none"> <li>• Objective assessment</li> <li>• No justifications</li> <li>• No explanations</li> <li>• A true assessment</li> </ul>	<p><b>What is possible with...</b></p> <ul style="list-style-type: none"> <li>• Existing resources</li> <li>• Creative thinking</li> <li>• Streamlining</li> <li>• Asking (and answering) how can we/I do this more effectively/efficiently</li> </ul>	<p><b>What we might achieve if...</b></p> <ul style="list-style-type: none"> <li>• Resources are reallocated</li> <li>• Department collaborate</li> <li>• We stop worrying about who gets credit for ideas</li> <li>• Updates are made</li> <li>• Processes are redesigned</li> </ul>
<hr/> <hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/> <hr/>

## WHAT HAPPENS WHEN IT GOES WRONG?

When it goes wrong (whatever it is), and it will go wrong, how do you respond? The principle of HELP is instructive in handling these situations.

### The HELP Process

- **H**ear their concerns.
  - ✓ Restate what you are hearing.
  - ✓ Address both the content of the customer’s message (WHAT they are saying) and the emotion the customer is expressing (HOW they are feeling).
  
- **E**xpand your view to see the “other sides” of the story.
  - ✓ Open-ended questions and probing statements provide a bigger picture of the situation and uncover information the customer didn’t think to share.
  - ✓ Begin with What, When, Where, Why, How, and Tell me/Give me.
  
- **L**et the customer participate in choosing the solution.
  
- **P**erform the actions that you have committed to.

Proper handling of customer service issues when they occur can deepen the customer relationship. It’s all about attitude, connection, and timely follow-through. Make sure you have your A.C.T. together as you work to deliver exceptional customer service.

## JOB AID 1: WHAT'S YOUR CUSTOMER SERVICE BEHAVIOR PROFILE?

### Service Behaviors

**Instructions:** When rating yourself in this section, choose the skill-level rating that most closely matches your performance of the behavior.

- A rating of "1" indicates you are NOT performing this behavior well.
- A rating of "5" indicates you are performing this behavior exceptionally well.

Use the open lines to add additional service behaviors you believe are critical to service delivery.

SERVICE BEHAVIORS					
	Skill-Level Rating				
1. I use active listening skills in all of my customer interactions.	1	2	3	4	5
2. I adjust my style to meet my customer's needs (rate of speech, use of humor, level of detail in explanations, and so on).	1	2	3	4	5
3. I adjust my service behaviors in response to the emotion my customer is demonstrating (mad, glad, sad, fearful).	1	2	3	4	5
4. I educate my customer (on processes, promotions, peak periods, and so on).	1	2	3	4	5
5. I ask questions to ensure the product or service I am providing will meet the stated and unstated needs of my customer.	1	2	3	4	5
6. I offer customers options and alternatives.	1	2	3	4	5
7. I follow through on actions I have committed to.	1	2	3	4	5
8. I recognize words or phrases that initiate conflict when they are said to me.	1	2	3	4	5
9. I reply to conflict-creating terms with responses that decrease the conflict.	1	2	3	4	5
10. I avoid conflict proactively with the language I choose.	1	2	3	4	5
11. I make and maintain eye contact with my customers.	1	2	3	4	5
12. I have and demonstrate a passion for customer service.	1	2	3	4	5
13.	1	2	3	4	5
14.	1	2	3	4	5
15.	1	2	3	4	5

## TOOL 1: EXAMINING CUSTOMER SERVICE STRATEGIES

### Service Strategies

**Instructions:** When rating in this section, place a checkmark in the appropriate column, true or false. Use the open lines to add and assess additional service strategies.

SERVICE STRATEGIES		
	TRUE	FALSE
<b>CUSTOMERS:</b>		
1. Make mistakes when following our processes.		
2. Voice frustration over redundant effort expected of them.		
3. Are commonly confused by a step in our processes.		
4. Comment that we do things inefficiently.		
5. Get annoyed easily when serviced.		
6. Ask questions such as: "What is taking so long?" or "Why didn't anyone tell me that?" or "If you aren't the right person, who is?"		
7. Do something "all the time" that creates delay, disappointment, dissatisfaction. (If yes, what is it they do? _____)		
<b>I HAVE:</b>		
8. Assessed my service delivery from my customers' perspective.		
9. Reordered service actions I take to match my customers' needs.		
10. Eliminated redundant steps in processes that affect my customers.		
11. Created a work environment well-suited to meeting my customers' needs.		
12. Created ways to avoid errors in my work.		
13. Created ways to prevent my customers from making mistakes.		
14.		
15.		
16.		

## TOOL 2: EVALUATING CUSTOMER SERVICE SYSTEMS

### Service Systems

**Instructions:** Answer each question thinking specifically of your interactions with customers.

1. Where do your customers encounter problems? (for example: website? locating office? completing forms?)
2. What system issues do your customers complain about? (for example: policy? payment methods/terms? others?)
3. How can the customer experience be simplified (from the customer's perspective)?
4. Where is there redundancy in processes (from the customer's perspective)?
5. What other system-related concerns have you noticed?



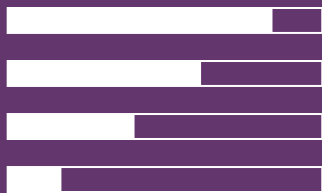
### Instructions:

Think of a product or service that you provide to your customer (whether internal or external). For this product or service, use the following table to identify how well you've mistake-proofed your process.

TECHNIQUES	HOW I AM USING MISTAKE PROOFING ALREADY
Streamline	
Color code	
Templates	
Checklists	
Layout	
Regulate behavior through size/dimension	
Correct misinformation	
Sequence	
Signage	
Grouping	
Baiting	

### TOOL 3: QUIT TAKING IT PERSONALLY (Q-TIP)

HOW DO YOU RESPOND (PHRASES OR BEHAVIORS) WHEN THE EXTERNAL CUSTOMER:	
Says "This isn't what I was expecting"	(disappointed)
Yells "Are you trying to pull one over on me!"	(argumentative)
Rolls their eyes, turns their head away from you, and exhales loudly.	(dismissive)
Asks "Do you have any experience with this product?"	(condescending)
Says "Well, if you had any sense, you'd understand what I am asking."	(rude)
Raises their voice and says "You are making me really angry right now."	(yelling)
Says "That isn't good enough; I know others have received a better deal."	(harassing)
Says "Would you stop reading from a script and just answer my question!"	(demanding)
Says "This isn't what I was expecting"	(annoyed)
HOW DO YOU RESPOND (PHRASES OR BEHAVIORS) WHEN THE INTERNAL CUSTOMER:	
Requests your help on their project and wants your content today	(inconsiderate)
Says "If you had done what I asked, this would never have happened."	(blaming)
Reads and responds to a smartphone message as you answer their question	(dismissive)
Says "You don't get the big picture here."	(condescending)
Passes a call to you without a warm transfer.	(disrespectful)
Asks "Is there a reason you didn't check the data before sending it?"	(annoyed)
Says "I know I said this wouldn't happen again...I promise this is the last time."	(takes advantage)
Asks you to override the system to extend a discount so that you can close a sale.	(creates an ethical dilemma)



THE  
**OHIO SOCIETY**  
OF **CPAs**

ADVANCING THE STATE OF BUSINESS

[www.ohiocpa.com](http://www.ohiocpa.com)

614.764.2727