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# Module 5: Collecting, Recording and Problem Solving in a Contact Centre



On completion of this module you will be covering the following Specific Outcomes which will enable you to:

* Elicit and offer information from and to customers in accordance with specific Contact Centre requirements
* Record information from customers correctly
* Refer escalating requirements
* Obtain and evaluate project specific information to facilitate solving problems in a Contact Centre
* Provide advice and support regarding received information to facilitate problem solving.

Nowadays, with the ready availability of communication devices many customers will simply pick up their mobile phone and contact a business to get a quote, find out the cost of something or just to inquire whether a product is available. Business owners realize that having an employee at the first point of contact who is proficient in telephone answering techniques will project a professional and positive image and in many instances can make or break a sale for their business.

Although we have covered many aspects in this module before, we aim to give you the opportunity to further develop your understanding with your role as a Contact Centre agent in the work environment where customers form the heart of what you do. It is important that you remind yourself and revise all other modules (especially Dealing with Customers and Communication Skills) we have covered as it will help you in successfully proving your competence in these unit standards.

Before we start this Module – **write down** what your personal thoughts and objectives are when it comes to working with people and working in a team.

**Personal Objectives**

**What key skills and knowledge do you think you need to correctly collect and record queries and requests from customers?**

**Why is it important for you to know about and be able to solve problems in your workplace ?**

**What’s in it for me?**

# Section One: Collecting and Recording Customers Queries and Requests

Finding customers is important - keeping customers is critical. We have covered communication and key customer service skills in earlier modules and have emphasized that customers don’t just buy a product or service; they also buy the many aspects which are indefinable, such as professionalism, helpfulness, responsiveness, friendliness, empathy, and good communication skills.

Although some concepts have been covered before, we will be looking at these skills and techniques within the context of a Contact Centre and how to apply them successfully.

## 1.1 Gathering Information from Customers

Remember when you deal with a customer, you represent the entire

company, its people, product and service.

**Benefits**

 of providing quality service include:

 Increased turnover directly affecting the bottom line through customer loyalty;

 Higher customer retention and more new customers;

 Reduced marketing, advertising, branding and promotion costs;

 Fewer complaints and where there are complaints, more are resolved and as a result, the customer stays.

 Reduced employee dissatisfaction (absenteeism, low morale, low productivity);

 Reduced attrition;

 Positive public perceptions of the company;

 Differentiation in the market and industry; and

 Positive workplace culture resulting in improved internal communication, teamwork and general employee satisfaction.

Communication is the key to being able to successfully gather information from your customers. Without effective communication skills you will not be able to :

* Establish rapport with your customer
* Ask direct questions to gather information about their query
* Empathise with an upset customer
* Paraphrase their concerns for clarity and understanding
* Respond professionally and positively
* Listen to what the customer is trying to tell you
* Provide quality customer service

We have covered these skills and techniques in earlier modules, however, one needs to stress the importance of them. Communication lies at the heart of the Contact Centre with you, the agent, being the communicator of it.

## 1.2 Responding to Customers

The best way to deal with each client (whether external or internal) is to believe and live by the following motto:

 Every customer is important to me. Looking after every client to the best of my ability is my priority.

 Every customer should be greeted promptly (i.e. no later than three telephone rings), pleasantly and made to feel welcome and an important part of my day.

 I must keep myself up to date with all the products/services that the organisation offers. This ensures that my service is accurate and professional.

 When I make a promise to a customer (and that does not just mean I say the words: "I promise..."), I make sure that I deliver.

 Every customer is entitled to have any queries, problems or complaints dealt with and satisfied promptly, courteously and efficiently.

 Always try to give the client "added value service", i.e. that little extra service or help which they may not expect.

 No one ever "wins" an argument with a customer and if I am in the wrong or have made a mistake, I will admit to it and apologise.

 I will treat every client, as I would like to be treated myself.

If you continually bear these above-mentioned points in mind when dealing with customers, you will have a solid grounding on which to begin giving service excellence.

### Tips to Build and Maintain Customer Relationships

 Remembering Customers’ Names

Remember that a person’s name to that person is the sweetest sound in any in language – it is the stamp of individuality.

The ability to remember names will:

o Show you are genuinely interested in your customers and their concerns; o Maintain customer loyalty by making the customer feel special and valued; o Will provide a personal touch to all your dealings with customers; o Make angry customers relax and feel more at ease; and o Will add to your positive, professional image.

 To help you remember a customer’s name and personalise your customer service: 1. Hear the person’s name clearly. When you are being introduced to anyone, LISTEN. Concentrate on getting the name right.

1. Get a clear impression of the person.
2. When you are introduced to a person, repeat the name immediately. Don’t merely say, “Hello” or “Good morning”; rather greet them by using their name, e.g. “Good morning Mr Ndlovu.”
3. Use the customer’s name several times in conversation. If you make a point to do this, you are not only engraving the name on your memory, but you are also pleasing your listener.
4. At the end of the conversation, say the name again, e.g. “May I assist you with anything else Mrs Smith?”

 Remember what we have learnt in the previous modules:

 **Be positive**

 Be positive

 Control the conversation

 Ask questions

 Get information

 Listen for closing clues (how to close the call)

 Overcome objections

  **Voice, Speech & Language**

 Speak clearly and distinctly and at a moderate speed

 Pause often and give your listener the opportunity to assimilate what you are saying

 Do not confuse or frustrate your listener through your careless habits

 Use words that are simple to understand

## 1.3 Recording Customer Information

You may get a caller that talks a lot and gives you more information than you need. Or you could receive a long email with lots of irrelevant detail. The best way to ensure that you only input accurate, correct information is to have a list of specific questions to ask, and to have a form for filling in the information.

Contact centres usually have a list of specific questions/prompts and forms you need to fill in on the system on your computer. But, for you to understand the process, you are going to have to make your own list of questions and design your own form later in the training.

Some general guidelines for determining what information you need are:

 If you are phoning prospective customers, the first question should establish if the customer is interested or suitable.

 Know what information you want. Be as precise as you can when you ask questions. Make sure you know the difference between information you MUST have and things that would be ‘nice to know’.

 How can you make sure the customer understands you? Use simple, everyday English/language to avoid any miscommunications.

 Break down the information you are giving to the customer into small bits.

When capturing information, the most important aspect to remember is accuracy. If you are collecting information by hand:

⇒ Learn to write clearly and quickly

⇒ Start at the top of the form and work your way down to ensure that you have collected everything.

⇒ Only write down the information you need.

⇒ Repeat the information to the customer to make sure it is correct.

If you are inputting information by computer:

 Learn the rules of how the form must be filled in

 Practice touch typing on the computer. This means typing without looking at the keyboard and using all your fingers.

 Fill the form in line by line as you would a handwritten form. Verify the information with the customer.

Your company may also specify specific rules when capturing information, e.g. use CAPITAL letters for surnames etc. It is your responsibility to make sure you are aware of these requirements.

## 1.4 Dealing with Escalations

We have established from discussing telephone skills in Dealing with Customers that an agent sometimes has to transfer a call to another department. When an agent has a problem and needs to transfer the call to someone more senior, such as a team leader or contact centre manager, we call this **escalation**.

The escalation procedures are an important part of any contact centre operation. The agent should try and resolve every query they receive and explore all alternatives before escalating the call.

If an agent can resolve the query during the customer’s first call, it is known as **first call resolution**.

The customer expects his/her query to be resolved as quickly as possible rather than being transferred from pillar to post, or waiting longer for the query to be resolved.

The agent will escalate a call to a higher level in the following situations:

⇒ The agent is unable to resolve a query;

⇒ The agent doesn’t have the authority to deal with the query;

⇒ The agent doesn’t have the skill or knowledge to deal with the query;

⇒ The customer asks to speak with a more senior person; ⇒ The agent doesn’t have authority to make decisions.

An example of an escalation procedure is as follows:

**Agent**

**Senior Agent**

**Team Leader**

**Contact Centre Manager**

**General Manager**

The key to an unhappy customer is that something was not to their expectation. Perhaps you failed to keep a promise, or a product/service is not up to scratch. There are two scenarios when it comes to an upset customer and when possible escalation procedures will be applied in a Contact Centre:

Scenario A - The customer immediately asks to be put through to a manager as soon as the call is connected...

Scenario B - The conversation descends to a state where the caller asks to speak to a manager.

In Scenario A, it would be advisable to:

1. Get the caller to "open up". How do you do this? Firstly acknowledge that the caller is upset. something like" oh, I'm sorry sir that you're unhappy... I am guessing that you're unhappy about something we've done"... get the customer to agree and acknowledge... get them to say "YES"... saying yes, psychologically is very potent... I know it's abit cheesy... but from the customer's end, they will be thinking that your agent is starting to understand my problem.

1. Once your caller has described the issue... the agent needs to take a decision on whether they can actually resolve the problem themself or if it does indeed need to be escalated. If the agent can resolve it locally, the agent should inform the caller and ask if they can be allowed to resolve it for them... hopefully, the rapport you have created previously will get your caller to say yes.

1. Sometimes this is not always the case, and on occasion you will get callers who simply want to feel like the matter is being escalated. This is OK, as you have to cater to a wide range of personalities and traits in a contact centre... once again, it is about one of affirmation to the caller that your business is taking their issue seriously. Once of the things I recommend never doing is to immediately transfer the call to a manager right there and then... usually the caller is too worked up and noes not normally portray the right sense of gravitas when it comes to a manager speaking to a customer, compared to a call centre operative. I suggest informing that a manager will be call them back in the next few minutes. but the key thing here is that you will keep your promise! you must keep this promise in order to begin to rebuild the caller's trust in your business. and make it clear to the caller that you have called them back. once again... this helps to disarm the caller and creates a more cooperative environment to resolve the matter.

In Scenario B, escalation would need to be applied in order to resolve the issue as well as gain the customer’s trust back. The circumstances of why the conversation descended to that point would need to be investigated after the caller has been helped.

# Go to your assessment pack and complete all activities for this Section

# Section Two: Customer Relationship Management

## 2.1 What is Customer Relationship Management (CRM)?

CRM, which stands for customer relationship management, is the process of tracking, organizing and analysing all the communication that is made between customers – both current and potential – and your business.

The benefits of CRM may not be obvious, since it’s easy to get caught up in the dayto-day running of a business, and you can forget about planning for future growth. Yet a customised customer relationship management strategy can have major effects on your business – both today and in the long run.

One major impression that a top-notch CRM system can have on a business is improved overall organisation. One of the key functions of any CRM process is **managing customer information**. Keeping in touch with your customers is vital to your business’ overall success – and all relevant departments need to be able to quickly and easily access information about customers’ past interactions with your company. A **centralised database** that adheres to a well designed system allows many people to access information independently. A great CRM system improves access for those who need it most.

A dedicated CRM system can make huge improvements in the efficiency with which your company is able to manage and organise information. There are CRM applications specifically designed to help you keep tabs on all your information – making your company less likely to overlook details. Since your workplace will have unique procedures, CRM applications come in options, such as specific customizations that are easy to implement.

Additionally, a CRM system can help you decide how to reach out to **future customers**. By analysing past marketing and sales initiatives, creating sales forecasting reports, and targeting key markets, your CRM applications can help make suggestions and enable you to focus your energies – and dollars – on the demographics most likely to respond to your campaigns.

Customer relationship management benefits companies by **increasing sales**. With organised information and improved access to that information, your business has the ability to offer quality service to your customers. Better service means a happier customer base, improved customer loyalty, increased customer retention, and wordof-mouth advertising.

Customer relationship management is one of the best ways to improve your company’s performance over time. With focused, carefully designed CRM efforts, you can take your relationship with your clients and customers to a new level.

## 2.1 Customer Relationship Management (CRM) Defined

This is a frequently asked question. Here are several definitions of customer relationship management published at CRMGuru.com by various contributors:

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| 1. **Official CRMGuru.com definition**  | **Customer Relationship Management (CRM)** is a business strategy to select and manage customers to optimize long-term value. CRM requires a customer-centric business philosophy and culture to support effective marketing, sales, and service processes. CRM applications can enable effective Customer Relationship Management, provided that an enterprise has the right leadership, strategy, and culture. |
| 2. Contributor: **Mei Lin** **Fung**, CRM.Talk Guru Found in: CRM.Talk #001   | **Customer relationship management** is the superset of business models, process methodologies and interactive technologies for achieving and sustaining high levels of retention and referrals within identified categories of valuable and growable customers.  |
| 3. Contributor: **Martin** **Brendling** Found in: CRM.Talk #055   | **CRM** is about developing and implementing business strategies and supporting technologies that close the gaps between an organisation's current and potential performance in customer acquisition, growth, and retention. What does it do for an organisation? CRM improves Return on Assets. The asset in this case is the customer and potential customer base.  |
| 4. Contributor: **Ryan CrawCour** Found in: CRM.Talk #056   | **Customer Relationship Management** should be exactly that: the process of actively deepening the knowledge (not data) you have of your customers over time, and then using that knowledge gained to customise your business and strategies to meet those customers’ individual needs. It is important to stress this point simply because a large percentage of the market's perception is that CRM is simply a technological solution that does sales force automation or Contact Centre. CRM is about an entire change of mindset to become customer orientated; it is not simply a piece of technology that will solve all your needs.  |
| 5. Contributor: **Jennifer Pratt** Found in: CRM.Talk #055   | **CRM** is a management approach or model that puts the customer at the core of a company's processes and practices. CRM leverages cutting-edge technology, integrated strategic planning, up close and personal marketing techniques and organisational development tools to build internal and external relationships that increase profit margins and productivity within a company.  |
| 6. Contributor: **Subbarat hnam Swaminathan**  | 1. **Customer Relationship Management** refers to the management of all interactions with the customer that  |

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| Found in: CRM.Talk #055   | an enterprise indulges in. Its focus is on managing and optimising the entire customer life cycle. The reason for the above definition is: The stated objective and benefit of good CRM is to increase the customer base by acquiring new customers and effectively serving the needs of the existing customers. 2. **Customer Relationship Management** is an information industry term for methodologies, software, and usually Internet capabilities that help an enterprise manage customer relationships in an organised way. For example, an enterprise might build a database about its customers that described relationships in sufficient detail. Therefore, management, salespeople, people providing service, and perhaps the customer directly could access information, match customer needs with product plans and offerings, remind customers of service requirements, and know what other products a customer had purchased.  |
| 8. Contributor: **Archana Sinha** Found in: CRM.Talk #055   | **CRM** is a "big picture" approach that integrates the sales, order fulfillment, and customer service, and co-ordinates and unifies all points of interaction with the customer, throughout the Customer Life Cycle (CLC).  |
| 9. Contributor: **Jack Carroll** Found in: CRM.Talk #001   | At its core, CRM has everything to do with customer satisfaction and nothing to do with technology, except insofar as technology furthers that end. Start with the premise of giving customers what they expected from you and more, and then figure out how technology helps do that. Technology is a means not an end.    |
| 10. Contributor: **Bob** **Thompson, Chief** **Guru Officer,** **CRMGuru.com** Found in: On the Front Line, July99(2)    | What is CRM? Think about your favourite small business with a proprietor who you really like. Chances are that business knows a lot about you, and it's mostly in the owner's head—your likes, dislikes, buying patterns, personal titbits ("How's the golf game?"), etc. If you're a long-term profitable customer, that's mentally filed away too, with nary a computer in sight. In a word, it's personal. And very effective CRM. Unfortunately, as the Internet geeks like to say, that approach doesn't "scale." With larger businesses (even just a few people), there is no collective memory unless it's stored somewhere, and stored information must be shared with the right people at the right time. Enter computers, CRM software, and the Internet. However, as my colleague AC Ross likes to say, don't make the mistake of "substituting action for thought." Before you act (buy and install the CRM solution), think about what you're trying to accomplish. Targeting and  |
|  | acquiring the right customers? Selling more effectively or efficiently? Improving customer care? Not sure? Put away your check book until you are. If you do focus on key problems in your business, CRM applications can probably help throughout the relationship lifecycle. Your customers will just keep coming back to do more business, and they won't really care what software you're using.  |

In Summary:

* Customer Relationship Management (CRM) is a business strategy to select and manage customers to optimize long-term value. CRM requires a customercentric business philosophy and culture to support effective marketing, sales, and service processes. CRM applications can enable effective Customer Relationship Management, provided that an enterprise has the right leadership, strategy, and culture. www.CRMGuru.com
* Customer Relationship Management refers to the process - usually depending on sophisticated computer systems - to record and analyse the buying habits of customers, so that a company can offer them goods or services in which they are likely to be interested. www.z2z.com
* Customer relationship management. A generic term that means to build longterm customer relationships by offing incentives for customers to remain loyal instead of taking their business elsewhere. www.marketconscious.com
* CRM entails all aspects of interaction a company has with its customer, whether it be sales or service related. CRM an information industry term for methodologies, software, and usually Internet capabilities that help an enterprise manage customer relationships in an organised way. www.creotec.com



**Case Study: Customer Relationship Management[[1]](#footnote-1)**

The following can be read and discussed around how CRM is applied in Contact Centre processes when collecting, responding and dealing with customers of a business.

***Case Study: Richard Whitney, Marketing services agencies take lead in***

Customer Relationship Management is about knowing your customer and being flexible and responsive to his / her needs.

“In the late '90s, Customer Relationship Management (CRM) emerged as a technological strategy for improving the way in which companies managed customer service and relations. New CRM software upgraded company operations by automating and integrating marketing, sales and service. Scores of b-to-b companies adopted solutions from technology suppliers to drive their success with CRM. For more than a decade, many blue-chip companies have been investing heavily in CRM systems and technology. With all this experience behind us, the time has come to ask ourselves a tough question: Has CRM lived up to its potential?

The answer, as we now know, is often "not really." Over the years, our understanding of CRM has evolved, and we know that to be successful, CRM needs to involve much more than just software. We have found that successful CRM results from a new business model, one that radically reorients organisations to focus on customers instead of products and departments.

Great products are no longer viewed as the sole key to market-place success. Instead, companies with exceptional customer intelligence have a competitive edge. They know who their customers are, what they truly want, how they think and what they feel. Using CRM as a strategy means the relentless pursuit of deep customer insight, coupled with the will to use that knowledge to drive product development, marketing, sales and even service.

Long before the introduction of CRM solutions, many companies already had the technology to develop deep customer insight. What they lacked was a compelling strategic rationale for making such investment a priority. This is why the marketing services industry is emerging as the new CRM leader.

Agency success has always derived from accurate insight into the hearts and minds of customers. While b-to-b customers were focusing on operations, we were focusing on how technology could be used to add depth and nuance to our understanding of customers' customers. As a result, we discovered that CRM could be better implemented — but we saw it too often fail because the large upfront financial commitment lacked a solid strategic foundation.

Today, advertising and marketing agencies have embraced technology and applied their strategic thinking and customer-centric philosophies to develop more targeted, effective CRM programmes. Customers are turning to agencies to help develop programmes that keep customers engaged with a brand while building loyalty and simultaneously measuring ROI.

So the question still remains: "Why are marketing services agencies emerging as the new leaders in the CRM world?" The answer is simple. Marketing services agencies have for years taken deep consumer insight and applied it to their strategic approach to CRM programmes. We've always been held accountable for our solutions, and pride ourselves on precise measurement.

In our ROI-driven world, companies can't successfully push their products with no real understanding of customer behaviour or by turning a blind eye to building loyalty. Agencies that have built a strong strategic planning and research department — and integrated it — are in a perfect position to develop even more effective CRM programmes.

Agencies can then take a behaviour-based approach, focusing on analysing consumercustomer dialogue to actually give customers control of what messages consumers are receiving and how. And it results in marketing programmes that are the brainchild of a strategy based on consumer data and insight.

The learning aspect of CRM should never end. B-to-b companies should continue to ask themselves: "How can we continue to reach people more effectively?" CRM in many ways can be thought of as dating. For the relationship to blossom, trust has to continue to grow even after the initial relationship has been established. B-to-b marketers should always be courting the customer — especially in today's customer-driven world.”

# Go to your assessment pack and complete the activity for this section

# Section Three: Problem Solving in a Contact Centre

## 3.1 Separting People from the Problem (Finding Information)

Humans are creatures of strong emotions who often have radically different viewpoints to you. Emotions become confused with the problem. People start to attack each other. One should work on attacking the problem and not the person.

If you do not deal sensitively with others, resolving conflict is difficult. This applies to external customers as well the people you work with.

During any point in a negotiation, it is worth asking yourself "Am I paying enough attention to solving the problem (instead of focusing on the emotions)?"

As contact centre negotiators, you want to reach an agreement that satisfies your company's interests but you also want to ensure that the customer stays one for life.

A statement such as:

'Whenever I phone this contact centre, I first get put on hold for 10 minutes and then I get passed from one person to another, ' - may be seen as being a personal attack and you could react defensively.

Another reason that the people and the problem become easily entangled in that comments are made, and then people become defensive and aggressive.

To effectively separate the problem from the person:

1. **Put yourself in their shoes**

The ability to see the situation as your customer/colleague sees it is one of the most important skills a negotiator can possess. It is not enough to know that they see things differently, you have to actually feel like them and see things the way they do.

1. **Acknowledge the other person’s feelings**

If emotions do get involved, let the other person know that you identify with what they are feeling. E.g. “I understand how you are feeling and why this is causing you an inconvenience…”

1. **Listen Actively and acknowledge what is being said**

Active listening improves not only what you hear but also what is being said.

Rephrase/summarise what the person has said in order to make sure that you understand correctly.

By empathizing and actively listening to your customer/colleague, you prevent a communication breakdown.

1. **Speak to be understood**

Put yourself in their shoes and use language that will be understood by both parties. Don't use too much jargon.

1. **Speak about yourself, not about them.**

Don’t blame the customer or point fingers at them even you feel that they are in the wrong. Rather focus on how best to solve the problem together.

1. **Be aware of speaking too much**

When a caller is angry, it is best to keep quiet and give them the opportunity to finish what they are trying to say.

## 3.2 Focus on Interests, not Positions

Consider the story of two men arguing in a library. One wants the window open and the other wants it closed. They continually argue about how much to leave it open: a crack, halfway, three-quarters of the way. No solution satisfies them both. Finally the librarian interrupts and she asks one why he wants the window open: "to get some fresh air." She asks the other why he wants it closed: "To avoid the draft." After thinking a minute, she opens wide a window in the next room, bringing in fresh air without a draft.

Your needs for goods, services or opportunities are usually the main reason why negotiation occurs. In conducting a successful negotiation you will need to provide opportunities to identify your/the organisation’s needs as well as the needs of the other party (the customer).

**How do you identify interests and needs?**

How do you go about understanding the interests of the other person:

 **1) Ask Why?**

One basic technique is to put yourself in their shoes. Examine each position they take, and ask yourself "Why are they feeling the way they are?"

**The most powerful interest are basic human needs**

In searching for the basic interests, it is important to take note of interests which motivate all people. If you can take care of such basic needs, you increase the chance both of reaching agreement.

Basic human needs include:

**Security** – if a caller phones because his life insurance policy has lapsed, even though he has been meeting all his payments, he will be extremely upset/angry.

Why would he be feeling this way?

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**Economic well-being**

**A sense of belonging**

**Recognition**

**Control over one’s life**

Can you think of situations where these basic human needs (above) would be threatened?

Economic well-being:

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A sense of belonging:

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Recognition:

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Control over one’s life:

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Everything you do ultimately affects the customer. You may be brilliant at your work output and have a great product, but if your relationship skills are not effective, your customers and your service to them will be affected. To this end, this section deals with skills required to develop and maintain relationships. You and your team will start by analysing your current relationships with your customers and your suppliers. You will consider what is going well, and what needs to be improved on in order to enhance and improve relationships with your customers and suppliers. Then you will look at yourself individually to identify how your relationships are working on a personal level – i.e. you will need to evaluate your actions to ensure that these relationships benefit your outputs and service delivery to your customers and suppliers.

## 3.3 Solving Problems

“We all try to do things right. No business sets out to do wrong when servicing customers. But life is full of surprises and mistakes do happen. While many people in businesses focus on doing things right the first time, very few seem to take a powerful interest in setting things right when things do go wrong.

It is when things go wrong that customers are most sensitive about how they are treated, most likely to share their experiences with friends and co-workers, and most likely to make lasting decisions about whether to bring their future business back to a company, or to its rivals.

We know that mistakes will happen. What we do not know is how we will be treated when we go back to get the mistake corrected. "Will they treat me as if it is my fault?" "Will they argue with me?" "Will they make it difficult for me to prove my purchase, fill out papers, or otherwise file my complaint?"

If service errors are handled quickly and professionally, customer loyalty can actually "bounce back" to greater heights. Use these seven simple steps to gain customer loyalty by "Bouncing Back" with S-E-R-V-I-C-E Recovery.”

## 3.4 Service Recovery is the answer Solving Customer Problems

1. **S-ay you’re Sorry**

There's nothing like a sincere apology, delivered right away, to let people know you really care.

1. **E-xpedite Solutions**

The faster you can fix the problem, the better.

1. **R-espond to the Customer**

Remember, people are involved, not just products, dates and orders. Take the time to empathise. Be a listening ear. Keep personal contact: use the phone, send a fax, stay in touch.

1. **V-ictory to the Customer**

Build higher levels of customer loyalty by giving more than what is expected.

1. **I-mplement Improvements**

Change your processes and improve training to avoid the problem next time.

1. **C-ommunicate Results**

Spread the word so that everyone can learn from what happened. Provide full information about consequences and improvements.

1. **E-xtend the Outcome**

Do not stop working when they stop complaining. Stay in touch until you are sure the customer comes back and his / her long-term loyalty is assured.

## 3.5 Problem Solving Tools and Techniques

#### 3.5.1 Brainstorming during Problem Solving Situations

The term “brainstorming” has become a commonly used word in the English language as a standard term for creative thinking. Brainstorming is a method for developing creative solutions to problems. It works by focusing on a problem and then coming up with as many solutions as possible even if some of them are a bit unusual.

During the brainstorming session there is no criticism of ideas - the idea is to open up as many possibilities as you can and break down fixed ideas about the limitations of the problem.

Once the ideas have been generated the results of the brainstorming session can be analysed and the best solutions can be explored using further brainstorming.

**The Brainstorming Rules**

The following rules are important to brainstorm successfully:

* A leader / facilitator should take control of the session, initially defining the problem to be solved with any conditions that must be met and then keeping the session on course.
* The leader should encourage an enthusiastic, uncritical attitude and encourage participation by all members of the team.
* A specified time should be set for the brainstorming session and the leader should ensure that no train of thought is followed for too long.
* The leader should try to keep the brainstorming on course and should try to steer it towards the development of some practical solutions.
* Participants in the brainstorming process should come from as wide a range of disciplines with as broad a range of experience as possible. This brings many more creative ideas to the session.
* Brainstormers should be encouraged to have fun brainstorming, coming up with as many ideas as possible, from solidly practical ones to wildly impractical ones in an environment where creativity is welcomed.
* Ideas must not be criticised or evaluated during the brainstorming session. Criticism introduces an element of risk for a group member in putting forward an idea. This could limit the creativity during the session.
* Brainstormers should not only come up with new ideas in a brainstorming session, but should also 'spark off' from associations with other people's ideas and develop other people’s ideas.
* A record should be kept of the session either as notes or a tape recording. This should be studied later for evaluation. It can also be helpful to jot down ideas on a board or flipchart which can be seen by all brainstormers.
* Clarify and conclude the session. Ideas that are identical can be combined, all others should be kept. It is useful to get an agreement on which ideas should be looked at further or what the next action and time period is.

When you are sure the brainstorming session is over, it is time to select a solution.

1. By using a show of hands (or another voting method), allow each person to vote for as many ideas on the original list as they want. Note that they only have one vote per generated ideal.
2. Write the vote tallies next to the ideal. You can use a different colour than the ideal to help it stand out.
3. Once the voting is completed, delete all items with no votes.
4. Next, look for logical breaks. For example, if you have several items with 5 or 6 votes and no 3 or 4 and only a couple of 1 and 2, then retain only the 5 and 6 votes. The group can help to decide the breaking point.
5. Now, it is time to vote again. Each person gets half number of votes as there are ideals left. For example is you narrowed the number of generated ideals down to 20, then each person gets 10 votes (if it is a odd number, round down). Each person will keep track of his or her votes. The scribe should again tally the votes next to the ideal, only this time use a different colour.
6. Continue this process of elimination until you get down to about 5 ideals.

Put the remainder ideas into a matrix. Put each ideal into its own row (first column). Next label some columns using selected criteria. For example:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Generated Idea**  | **Low Cost**  | **Easy to Implement and Feasible**  | **Will Help Other** **Processes**  | **Total**  |
| Hire a new employee  |   |   |   |   |
| Share the extra workload  |   |   |   |   |

1. Next, working one column at a time, ask the group to order each idea. Using the above example, which one will cost the least, the most and will be in the middle.
2. Repeat by working the next column until you have completed all columns.

Total each column until it looks similar to this:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Generated Idea**  | **Low Cost**  | **Easy to Implement and Feasible**  | **Will Help Other** **Processes**  | **Total**  |
| Hire a new employee  | 3  | 1  | 1  | 5  |
| Share the extra workload  | 1  | 3  | 3  | 7  |

1. It this case, the lowest number column, "Hire a new employee," would be the best solution.

Note that you should work each column first (not each row).

 Some of the columns will require much discussion, as choosing an arbitrary number will not be that easy in some cases.

 Often, you will have a couple of ideas that tie, but having it diagrammed out in a matrix makes it much easier to make a decision.

Another innovative way to brainstorm is as follows:

Dealing with concerns in a neutral environment provides a non-confrontational way for those participating to be more willing to exchange ideas on how to eliminate and/or resolve the issues at hand.

Each brainstorming session should be constructed so everyone feels comfortable contributing. This is not a time to evaluate or criticize others and their ideas. All ideas should be considered, even the extreme ones – they can help lead to a workable solution.

Here are a few suggestions for your sessions:

1. Give the participants a chance to think about the issue(s) ahead of time. Hand out material on the topic or post it on a bulletin board, outlining the problem(s) a few days ahead of the scheduled session.
2. Plan the meeting with sufficient time to express new ideas & improve on them with other suggestions.
3. Appoint a "Traffic Director". Their role is to call on each speaker and keep the ideas flowing. This person DOES NOT offer, criticize, or praise any ideas presented during this session.
4. Appoint a "Recording Secretary" to write down the suggestions in a notebook, on a chalkboard or a flip chart where all can see them. Again, this person DOES NOT participate in the meeting.
5. The "Traffic Director" should encourage excitement and enthusiasm at the meeting. Don't discourage appropriate humor. Laughter generates creative discussion.
6. A good brainstorming session is one in which ideas build upon one another. An unworkable idea may inspire another innovation that does work.

Later, let all the participants know the decision reached, and thank them for their ideas. They can then view their contributions with pride.

#### 3.5.2 Group Problem Solving and Decision Making

Group problem solving and group decisions can benefit not only the group but also the entire organisation. The techniques used to make group decisions are similar to those that individuals use to make decisions.

Group problem solving and decisions include the thoughts and opinions of several individuals who share many viewpoints and decision frameworks. Groups also tend to have a good information pool on which members can base their decisions. When individual team members have varied viewpoints, they can discuss the issue with the entire group and arrive at a decision that benefits the organisation.

To make effective decisions, a group needs to develop decision making plans. These plans will help it make the best possible decisions without destructive conflict, which can hold back a team’s decision making ability. There are various guidelines to check the success of a decision.

**Ensuring the success of a group’s decision**

Some benefits of developing decision making plans include effective brainstorming efforts and an increased ability to work well as a group. By developing strategies together, the group will develop good relationships among its members. It will also create a sense of ownership of the decisions, which will compel each group member to provide useful feedback and ideas to the group.

For your group to be valuable to the organisation, it must make good decisions. You can use the following steps to assure the success of your group's decisions:

* **Determining standards** - The nature of the decision will tell you what the standards are. For example, let’s say your group is implementing a Customer Relationship Management (CRM) programme to improve communications, sales and customer service. One performance standard for this decision can be to increase the company’s customer retention rate by 16 percent without exceeding the CRM budget.
* **Measuring results** - To complete the measuring results step, your group should first set a definite date on which the results can be accurately measured. On that date, measure the effect of the decision on each group of stakeholders, as well as on the company’s finances and resources.

## 3.6 Information Gathering Techniques

There are various information gathering techniques that involve asking questions:



#### 3.6.1 Four W’s and H Questioning technique

This technique is often used to gather information in order to analyse the cause and effects of the problem. Use the following formula: H + 4 W’s = E

|  |  |
| --- | --- |
|  H = How (much) (Quantity)  |  = Cause & Effects  |
|  W = Who (People)  |
|  W = What (Occurrence of problems)  |
|  W = Where (Place)  |
|  W = When (Time)  |
|  This all adds up the E or Effect(s) of the problem.  |  |

The Four W’s and H, is a powerful, exciting and imaginative checklist. The technique uses basic questioning techniques by asking open questions that helps you gather information. The method is useful at any level from a formal checklist to complete informality during the problem solving process.

#### 3.6.2 Five Why’s technique

In this technique, the problem solver asks individuals a series of five why-based questions to uncover the real issues of the problem. To be effective and avoid irritating the person being questioned, you should listen attentively to the answers and ask questions based on the responses. The Five Why’s approach can separate complex problems into distinct parts and point to the potential root causes.

**Example:**

Where the question and answers are related, you ask why C happened and the answer is related to another event B and so the same question can be reiterated, i.e.

* WHY did C happen, because B did
* WHY did B happen, because A did
* WHY did A happen, because (etc…..)

#### 3.6.3 SWOT Analysis

A successful technique for identifying your Strengths and Weaknesses and study any Opportunities and Threats you face in a problem situation within a business environment. The SWOT analysis requires you to write down answers to the following questions:

Once brainstorming has been completed (ideas on table), apply SWOT to determine particular areas to focus on.

|  |  |
| --- | --- |
| Strengths | Weaknesses |
| Opportunities | Threats |

##### Strengths

What do you do well? What are your advantages? Consider this from your point of view and that of others. Be realistic but not modest, add to this a list of your characteristics, hopefully some of these will be strengths.

##### Weaknesses

What is done badly? What could be improved? What should be avoided? Consider this question from an internal and external perspective – is it possible others see weaknesses you do not? Are your competitors doing better? Be realistic, looking any unpleasant truths face on.

##### Opportunities

What are the interesting trends? Where are the opportunities available to you? Useful opportunities can arise from

* New technology, changes in the market place
* Alterations in government policies related to your field
* Changes in social patterns, population profiles, lifestyle changes etc.
* Local event

##### Threats

What obstacles do you face? How are your competitors fairing? Could changes in technology threaten your position? Do you have bad debt or cash-flow problems?

# Go to your assessment pack and complete all activities for this section

# Section Four: Articles of Interest

This section will help you further develop your understanding of what we have covered in this module of learning. While many of the aspects will largely be dependent on the operating guidelines of your workplace, it is always beneficial to read and research on what is happening in your and other industries as best practice and there may be something that you can take and apply in your workplace.

## 4.1 Trends in Customer Service Software[[2]](#footnote-2)

This article is very relevant at how we communicate and service customers in today’s Contact Centre and business environments. It also explains the changing trends in collecting and recording information from customers



Having good customer service is a necessity for any business. As businesses and technology evolve, so does customer service. Customer expectations become higher every day; in a world where we are used to receiving instant gratifications, people don’t like waiting around for something to get done. A company with exceptional customer service will not only help you retain customers, but will also help your business stand out from the competition. Over the past few years, providers of customer service software have stepped up their game to provide businesses with tools that are better than ever. The following is a list of some of the biggest trends in customer service software and how they’re helping businesses stay ahead of the competition.

#### Web-based/On-demand

Customer service needs to be fast—it’s difficult to rely on outdated software and equipment. One of the most visible trends in customer service that benefits both the representative and the customer is a Web-based system that is integrated with a business’s customer relationship management (CRM) platform. It provides an easy way for customers to submit a service request without hassle. For customer service over the phone, Web-based systems allow operators access to all the information they need to process the call, as well as an easy way to track and report activities and access customer information if needed. The services are accessible from any computer, with any operating system, so you can chose the system that is right for your business.

#### Customizable

Customer service software, especially those services that are online, can seem prepackaged and impersonal for both the company using it and a customer who may be an end-user on another medium. A new trend that these providers are really focusing on is making this software customizable, so not only does it match your other processes and software, you can add or take away the tools that you may not need. This means that businesses of all shapes and sizes can use the same service and have it tailored to their exact needs. **Live chat**

Chances are that if you’ve been on any company Web site in the past year, you have have at least been alerted to a “live chat” feature on the site. Live chat is a popular feature that lets customers talk directly to a customer service rep through an integrated chat window. Customers get help when they need it, and don’t need to spend time searching the site for contact information and take time submitting a service request ticket. Faster service means happy customers, and more time to give to other customers as well.

**Integrate with** social networks

Although they’re still relatively new to the world of customer service, social networks can provide another channel to reach customers and provide better service. Some Web-based services provide integration with sites like Twitter and Facebook so you can stay connected to your customers in real-time, at in the areas where they spend the most time online. You can be alerted to problems as they happen, stay proactive and focusing on customer needs and wants—without the customers ever needing to contacting you. **Automating your tasks**

Automating your customer service tasks is a good way to not only streamline service but also to provide better service. Similar to sales force automation, customer service automation allows you to route problems to the right representative, ensuring fast and efficient service from the rep and for the customer. Pinpoint your reps’ individual strengths and use them to your advantage. Web-based services also allow you to create extensive FAQs (from the information you gather via service reports, etc.) for both customer and representative benefit, providing easy access to your most commonly asked questions.

## 4.2 Call Centre Protocols – Getting Problems Solved[[3]](#footnote-3)

Customer support agents (CSAs) are the first line of support for the client when a problem arises. If a level-1 CSA has tried all introductory problem-solving skills, has referred to the company knowledge base (KB) for a possible solution, and is still unable to resolve the problem, the incident ticket is escalated to second level (L2) support, where CSAs have advanced training and more knowledge on how to resolve the issue. If the problem is software-related, the CSA at this level can guide the user on how to fix the problem. If the client is not computer savvy, the CSA can remote into the client’s workstation, and by taking control of the client’s machine, can resolve the problem more efficiently. Now if the problem is hardware-related, the ticket must be sent to third level (L3) support. This is when an onsite technician must go to the client site and physically change hardware parts or peripherals in order to close out the ticket.

Every company has its own service level agreement (SLA) to resolve an incident. An SLA is an agreement a company makes with the support group it hires to resolve customer problems. The support group can be internal (in house) or external (outsourced). A lot of companies are opting to outsource their support group because it’s a more cost-effective approach. However, the problem with outsourced support is that sometimes the actual support offered is average at best, and sometimes there is a language barrier, which is frustrating to the client calling in at the other end.

Every organization has its own SLA numbering scheme, and the time it takes to resolve an issue is given a set number of hours or days, depending on if the problem is business-critical, where the company is losing revenue, or the number of people affected by the problem. Then there are lower (less severe) issues that affect a single workstation, but there are exceptions when handling VIP users having these less critical problems.

Below are guidelines that were used to determine the severity of an issue when I was working for a major pharmaceutical company. As mentioned above, organizations’ guidelines vary from one another, which should be kept in mind: **Severity 1**

* a major outage affecting multiple sites
* a critical server is down (a specific severity level was given to each classification of server in the event it went down)
* an issue affecting more than 50 users

At this severity level, a ticket had to be escalated within 15 minutes of the initial call, and had to be resolved within 2–4 hours. **Severity 2**

* a semi-critical server is down
* an issue affecting more than 30 users
* a network printer is down
* end-of-day reports can’t be processed; sales figures are off

At this level of severity, a ticket had to be escalated within 30 minutes of the initial call, and had to be resolved within 3–6 hours.

#### Severity 3

* single user problem—not business-critical
* service request (SR)

The ticket had to be resolved within 24 hours.

#### Severity 3 (VIP)

All VIP tickets were assigned a severity 3 status. However, the on-call helpdesk manager had to be notified immediately, and he would personally assign the appropriate technician to resolve the problem ASAP.

#### Severity 4

• how-to questions

This ticket could take up to a couple of days to resolve, as it was not a top priority. Usually, the graveyard shift CSAs handled the non-pressing issues when they had downtime.

It should always be remembered that the call center environment involves more than just systems and protocols; it also involves the all-important factor in actually getting problems solved: human interaction. This puts a responsibility not only on the CSA, but on the client being served as well. For that reason, and based upon my experience as escalation lead in a helpdesk environment, I think it’s important that the client always be courteous with CSAs; they are trying their best to resolve problems promptly and efficiently.

Each CSA is monitored on his or her talk-time—the amount of time spent speaking with the client—and the less amount of time, the better. Once the agent has reached the talk-time limit—a standard that varies from organization to organization—the agent must escalate the ticket in order to take more calls and meet the daily call-taking quota. So it’s in the CSA’s best interest to resolve a problem rather than escalate the ticket to another group to resolve.

I know from experience that if a client is friendly with the CSA, the agent will go out of his or her way to help out as best he or she can. On the other hand, if the client is arrogant, uncooperative, or verbally abusive, well, let’s just say the CSA will not go the extra mile to be helpful.

1. Source: CRM: B to B, Vol. 91 Issue 7; June 2006 [↑](#footnote-ref-1)
2. Taken from: http://www.allthingscrm.com/help-desk-and-contact-center-applications/trends-in-customerservice-software.html [↑](#footnote-ref-2)
3. Source: Written by Jeff Spitzer. http://blog.technologyevaluation.com/blog/2008/07/15/call-center-protocolsgetting-problems-solved/ [↑](#footnote-ref-3)