**LEARNER GUIDE**

**Supervise customer service standards**

Unit Standard 118028

Level 4 Credits 8

# TABLE OF CONTENTS

[TABLE OF CONTENTS 2](#_Toc127365509)

[PERSONAL INFORMATION 3](#_Toc127365510)

[INTRODUCTION 4](#_Toc127365511)

[Structure 4](#_Toc127365512)

[Programme methodology 4](#_Toc127365513)

[What Learning Material you should have 5](#_Toc127365514)

[Different types of activities you can expect 6](#_Toc127365515)

[Learner Administration 7](#_Toc127365516)

[Assessments 7](#_Toc127365517)

[Learner Support 8](#_Toc127365518)

[Learner Expectations 9](#_Toc127365519)

[UNIT STANDARD 118028 10](#_Toc127365520)

[IMPLEMENT AND IMPROVE CUSTOMER SERVICE STANDARDS IN ACCORDANCE WITH THE PRESCRIBED ORGANISATIONAL REQUIREMENTS 14](#_Toc127365521)

[Let’s read the following article by Dave Durham 15](#_Toc127365522)

[THE HANDLING OF CUSTOMER QUERIES AND COMPLAINTS 22](#_Toc127365523)

[Give customers a positive impression of yourself and your organisation 22](#_Toc127365524)

[Procedures for handling complaints 23](#_Toc127365525)

[Let’s read the following article: 23](#_Toc127365526)

[Handle customer complaints with L.E.A.R.N. 25](#_Toc127365527)

PERSONAL INFORMATION

|  |  |
| --- | --- |
| **NAME** |  |
| **CONTACT ADDRESS** |  |
|  |
| **Code** |  |
| **Telephone (H)** |  |
| **Telephone (W)** |  |
| **Cellular** |  |
| **Learner Number** |  |
| **Identity Number** |  |
|  | |
| **EMPLOYER** |  |
| **EMPLOYER CONTACT ADDRESS** |  |
|  |
| **Code** |  |
| **Supervisor Name** |  |
| **Supervisor Contact Address** |  |
|  |
| **Code** |  |
| **Telephone (H)** |  |
| **Telephone (W)** |  |
| **Cellular** |  |

INTRODUCTION

#### Welcome to the learning programme

Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take notes and share information with your colleagues. Important and relevant information and skills are transferred by sharing!



This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!

Structure

### Programme methodology



The programme methodology includes facilitator presentations, readings, individual activities, group discussions and skill application exercises.

Know what you want to get out of the programme from the beginning and start applying your new skills immediately. Participate as much as possible so that the learning will be interactive and stimulating.

The following principles were applied in designing the course:

* Because the course is designed to maximise interactive learning, you are encouraged and required to participate fully during the group exercises
* As a learner you will be presented with numerous problems and will be required to fully apply your mind to finding solutions to problems before being presented with the course presenter’s solutions to the problems
* Through participation and interaction the learners can learn as much from each other as they do from the course presenter
* Although learners attending the course may have varied degrees of experience in the subject matter, the course is designed to ensure that all delegates complete the course with the same level of understanding
* Because reflection forms an important component of adult learning, some learning resources will be followed by a self-assessment which is designed so that the learner will reflect on the material just completed.

This approach to course construction will ensure that learners first apply their minds to finding solutions to problems before the answers are provided, which will then maximise the learning process which is further strengthened by reflecting on the material covered by means of the self-assessments.

#### Different role players in delivery process

* Learner
* Facilitator
* Assessor
* Moderator

### What Learning Material you should have

This learning material has also been designed to provide the learner with a comprehensive reference guide.

It is important that you take responsibility for your own learning process; this includes taking care of your learner material. You should at all times have the following material with you:

|  |  |
| --- | --- |
| **Learner Guide** | **This learner guide is your valuable possession:**  This is your textbook and reference material, which provides you with all the information you will require to meet the exit level outcomes.  During contact sessions, your facilitator will use this guide and will facilitate the learning process. During contact sessions a variety of activities will assist you to gain knowledge and skills.  Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take and share information with your colleagues. Important and relevant information and skills are transferred by sharing!  This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you! |
| **Formative Assessment Workbook** | The Formative Assessment Workbook supports the Learner Guide and assists you in applying what you have learnt.  The formative assessment workbook contains classroom activities that you have to complete in the classroom, during contact sessions either in groups or individually.  You are required to complete all activities in the Formative Assessment Workbook.  The facilitator will assist, lead and coach you through the process.  These activities ensure that you understand the content of the material and that you get an opportunity to test your understanding. |

### Different types of activities you can expect

To accommodate your learning preferences, a variety of different types of activities are included in the formative and summative assessments. They will assist you to achieve the outcomes (correct results) and should guide you through the learning process, making learning a positive and pleasant experience.



The table below provides you with more information related to the types of activities.

| **Types of Activities** | **Description** | **Purpose** |
| --- | --- | --- |
| **Knowledge Activities** | You are required to complete these activities on your own. | These activities normally test your understanding and ability to apply the information. |
| **Skills Application Activities** | You need to complete these activities in the workplace | These activities require you to apply the knowledge and skills gained in the workplace |
| **Natural Occurring Evidence** | You need to collect information and samples of documents from the workplace. | These activities ensure you get the opportunity to learn from experts in the industry.  Collecting examples demonstrates how to implement knowledge and skills in a practical way |

### Learner Administration



#### Attendance Register

You are required to sign the Attendance Register every day you attend training sessions facilitated by a facilitator.

#### Programme Evaluation Form

On completion you will be supplied with a “Learning programme Evaluation Form”. You are required to evaluate your experience in attending the programme.

Please complete the form at the end of the programme, as this will assist us in improving our service and programme material. Your assistance is highly appreciated.

### Assessments

The only way to establish whether a learner is competent and has accomplished the specific outcomes is through the assessment process. Assessment involves collecting and interpreting evidence about the learners’ ability to perform a task.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

This programme has been aligned to registered unit standards. You will be assessed against the outcomes as stipulated in the unit standard by completing assessments and by compiling a portfolio of evidence that provides proof of your ability to apply the learning to your work situation.



**How will Assessments commence?**

#### Formative Assessments

The assessment process is easy to follow. You will be guided by the Facilitator. Your responsibility is to complete all the activities in the Formative Assessment Workbook and submit it to your facilitator.

#### Summative Assessments

You will be required to complete a series of summative assessments. The Summative Assessment Guide will assist you in identifying the evidence required for final assessment purposes. You will be required to complete these activities on your own time, using real life projects in your workplace or business environment in preparing evidence for your Portfolio of Evidence. Your Facilitator will provide more details in this regard.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

### Learner Support

The responsibility of learning rests with you, so be proactive and ask questions and seek assistance and help from your facilitator, if required.



Please remember that this Skills Programme is based on outcomes based education principles which implies the following:

* You are responsible for your own learning – make sure you manage your study, research and workplace time effectively.
* Learning activities are learner driven – make sure you use the Learner Guide and Formative Assessment Workbook in the manner intended, and are familiar with the workplace requirements.
* The Facilitator is there to reasonably assist you during contact, practical and workplace time for this programme – make sure that you have his/her contact details.
* You are responsible for the safekeeping of your completed Formative Assessment Workbook and Workplace Guide
* If you need assistance please contact your facilitator who will gladly assist you.
* If you have any special needs please inform the facilitator

### Learner Expectations

Please prepare the following information. You will then be asked to introduce yourself to the instructor as well as your fellow learners



|  |
| --- |
| Your name: |
|  |
|  |
| The organisation you represent: |
|  |
|  |
| Your position in organisation: |
|  |
|  |
| What do you hope to achieve by attending this course / what are your course expectations? |
|  |
|  |
|  |

# UNIT STANDARD 118028

#### Unit Standard Title

Supervise customer service standards

#### NQF Level

4

#### Credits

8

#### Purpose

This unit standard is intended for people who supervise service standards in wholesale and retail stores. Persons credited with this standard can select from a wide choice of procedures ranging from standard to non-standard. They are responsible for the achievement of group output.

Persons credited with this unit standard will be able to identify areas of service impact, analyse existing service standards and compare them to organisational service requirements. They will also be able to draw up and implement action plans to improve service standards.

#### Learning Assumed To Be In Place And Recognition Of Prior Learning

It is assumed that the learners has completed Grade 12 or equivalent before attempting this unit standard.

#### Unit Standard Range

Specific Outcome 1: Implement customer service standards in accordance with the prescribed organisational requirements.

Assessment Criteria:

"Moments of truth" are explained based on their impact on customer impressions.

Range: "Moments of truth" includes but is not limited to all areas where the customer would experience good or bad service and includes but is not limited to stock availability, hygiene and cleanliness, where they interact with team members, product quality.

#### Specific Outcomes and Assessment Criteria:

**Specific Outcome 1**

Implement customer service standards in accordance with the prescribed organisational requirements.

**Assessment Criteria**

* "Moments of truth" are explained based on their impact on customer impressions.
* **RANGE** "Moments of truth" includes but is not limited to all areas where the customer would experience good or bad service and includes but is not limited to stock availability, hygiene and cleanliness, where they interact with team members, product quality.
* Service standards are identified as required by the organisation.
* Service standards are evaluated in terms of existing service delivery.
* A comparison between existing and required service standards is conducted, and gaps are identified according to organisation's procedures.

**Specific Outcome 2**

Improve customer service standards.

**Assessment Criteria**

* An action plan to improve service standards is developed within the constraints and priorities of the organisation.
* The action plan is communicated to all role-players within agreed timeframes and meets organisational specifications.
* The success of the action plan is evaluated and adapted according to identified requirements.

**Specific Outcome 3**

Oversee the handling of customer queries and complaints.

**Assessment Criteria**

* The procedures for handling queries and complaints are explained according to organisation's policy and procedures.
* The handling of queries and complaints is monitored and evaluated against the organisation's requirements.
* Non-compliance with standards is identified and corrective actions are taken/suggested in accordance with organisation's policy.

#### Unit Standard Accreditation And Moderation Options

Programmes leading to the award of credits from this unit standard will be accredited by the relevant SETA in its ETQA role. Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant SETA ETQA.

Moderation:

* Internal Moderations will be performed by the Accredited Providers whilst the specific ETQA will perform external moderations of assessments across the Accredited Providers according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

#### Unit Standard Essential Embedded Knowledge

Learning programme covering this unit standard must address the following knowledge areas:

The areas falling within the term "moments of truth".

* Organisation's service standards.
* Organisational procedure for handling customer queries and complaints.
* How to compile action plans.

#### Critical Cross-field Outcomes (CCFO):

**Unit Standard CCFO Identifying**

Specific Outcome 2: Improve customer service standards.

Assessment Criteria:

* An action plan to improve service standards is developed within the constraints and priorities of the organisation.
* The action plan is communicated to all role-players within agreed timeframes and meets organisational specifications.
* The success of the action plan is evaluated and adapted according to identified requirements.

**Unit Standard CCFO Working**

Specific Outcome 2: Improve customer service standards.

Assessment Criteria:

* The action plan is communicated to all role-players within agreed timeframes and meets organisational specifications.

**Unit Standard CCFO Organising**

Specific Outcome 2: Improve customer service standards.

Assessment Criteria:

* An action plan to improve service standards is developed within the constraints and priorities of the organisation.
* The action plan is communicated to all role-players within agreed timeframes and meets organisational specifications.
* The success of the action plan is evaluated and adapted according to identified requirements.

**Unit Standard CCFO Collecting**

Specific Outcome 1: Implement customer service standards in accordance with the prescribed organisational requirements.

Assessment Criteria:

* "Moments of truth" are explained based on their impact on customer impressions.
* **Range:** "Moments of truth" includes but is not limited to all areas where the customer would experience good or bad service and includes but is not limited to stock availability, hygiene and cleanliness, where they interact with team members, product quality.
* Service standards are identified as required by the organisation.
* Service standards are evaluated in terms of existing service delivery.
* A comparison between existing and required service standards is conducted, and gaps are identified according to organisation's procedures.

**Unit Standard CCFO Communicating**

Specific Outcome 2: Improve customer service standards.

Assessment Criteria:

* The action plan is communicated to all role-players within agreed timeframes and meets organisational specifications.

**Unit Standard CCFO Demonstrating**

Specific Outcome 3: Oversee the handling of customer queries and complaints.

Assessment Criteria:

* The procedures for handling queries and complaints are explained according to organisation's policy and procedures.
* The handling of queries and complaints is monitored and evaluated against the organisation's requirements.
* Non-compliance with standards is identified and corrective actions are taken/suggested in accordance with organisation's policy.

# IMPLEMENT AND IMPROVE CUSTOMER SERVICE STANDARDS IN ACCORDANCE WITH THE PRESCRIBED ORGANISATIONAL REQUIREMENTS

#### Specific Outcome 1

Implement customer service standards in accordance with the prescribed organisational requirements.

#### Assessment Criteria

* "Moments of truth" are explained based on their impact on customer impressions.
* **RANGE** "Moments of truth" includes but is not limited to all areas where the customer would experience good or bad service and includes but is not limited to stock availability, hygiene and cleanliness, where they interact with team members, product quality.
* Service standards are identified as required by the organisation.
* Service standards are evaluated in terms of existing service delivery.
* A comparison between existing and required service standards is conducted, and gaps are identified according to organisation's procedures.

#### Specific Outcome 2

Improve customer service standards.

#### Assessment Criteria

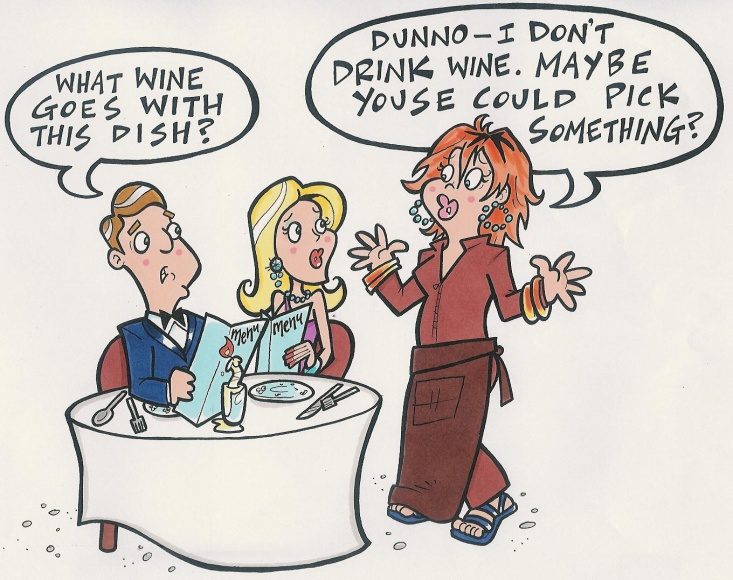
* An action plan to improve service standards is developed within the constraints and priorities of the organisation.
* The action plan is communicated to all role-players within agreed timeframes and meets organisational specifications.
* The success of the action plan is evaluated and adapted according to identified requirements.

You might not be able to define service, but you know it when you find it, and so do your customers. Countless books and articles have been written on the subject of service. Every company touts service as its goal, but it is acknowledged that, "Service is an elusive concept that is extremely difficult to measure and evaluate." Nevertheless, it is the lifeblood of any industry. So we must ask ourselves, "What is customer service?"

In today's competitive marketplace, service is the most important thing a company has to sell. It differentiates businesses when they have the same product. If service consisted simply of smiling or getting the product or service to the customer on time, it would be difficult enough, but we know it is much more complex than that.

We've been told over and over that every time we come in contact with a customer, we make a good or bad impression for the organisation we represent. The gurus have taught us that these are called the "moments of truth." That being the case, the first moment of truth takes place with a genuine and personal touch as soon as the customer walks in the front door. This sets the tone for the rest of the experience, and if it gets even better, the customers’ experience at your organisation will be unforgettable.

**A Moment of Truth is any opportunity to create a lasting perception in our customer’s mind**



### Let’s read the following article by Dave Durham

Years ago I owned an ice business in the suburbs of a large city. This was a very competitive business in a relatively small ice market. The market was dominated by giants. The barriers of entry were great. I not only succeeded but I thrived. The reason? My employees and I knew what a moment of truth was. In most cases we were successful when we came across our moment of truth.

What is a moment of truth? A moment of truth is the interaction between the customer and the customer service provider which leaves a lasting impression on the customer...positive or negative! It truly makes the difference in your success or failure.

It's great to have someone to welcome your customers in the front door and to say have a great day when they leave but if you fail at the moment of truth throw the rest out the door! It's all about attitude. What is attitude? Attitude is thoughts, feelings and actions. It's really that simple.

Give me a person with an MBA in customer service but with a bad attitude and you can throw the MBA away! You don't have to agree with your customer to give great customer service but you ***MUST*** understand your customer and how their mind works.

No two customers are just alike and no customer's mood is the same. When you understand their mind and how it works you can deal with any situation at any time. Your conscience mind must be retrained to reject negative thoughts.

Understanding the customer's mind and how it operates is the key to great customer service.

***REMEMBER***

A standard is an outcome. It therefore can be depicted by:

* A picture
* Active sentences
* [verb] – [object] – [measure of the outcome]

E.g. [Answer] – [the phone] – [in three rings]

|  |
| --- |
|  |

***REMEMBER***

A standard is an outcome. It therefore can be depicted by:

* A picture
* Active sentences
* [verb] – [object] – [measure of the outcome]

E.g. [Answer] – [the phone] – [in three rings]

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#### Hygiene and cleanliness

* Pick a department at your organisation
* Map the moments of truth for one or more customer segments
* Create a standard of operation to get consistency
* Redesign processes to get efficiency and effectiveness
* Identify and explain how you would train existing and recruit new staff to ensure staff have the competence to execute the Moment of Truth well

***REMEMBER***

A standard is an outcome. It therefore can be depicted by:

* A picture
* Active sentences
* [verb] – [object] – [measure of the outcome]

E.g. [Answer] – [the phone] – [in three rings]

|  |
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#### Where customers interact with team members

* Pick a department at your organisation
* Map the moments of truth for one or more customer segments
* Create a standard of operation to get consistency
* Redesign processes to get efficiency and effectiveness
* Identify and explain how you would train existing and recruit new staff to ensure staff have the competence to execute the Moment of Truth well

***REMEMBER***

A standard is an outcome. It therefore can be depicted by:

* A picture
* Active sentences
* [verb] – [object] – [measure of the outcome]

E.g. [Answer] – [the phone] – [in three rings]

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#### Product quality

* Pick a department at your organisation
* Map the moments of truth for one or more customer segments
* Create a standard of operation to get consistency
* Redesign processes to get efficiency and effectiveness
* Identify and explain how you would train existing and recruit new staff to ensure staff have the competence to execute the Moment of Truth well

***REMEMBER***

A standard is an outcome. It therefore can be depicted by:

* A picture
* Active sentences
* [verb] – [object] – [measure of the outcome]

E.g. [Answer] – [the phone] – [in three rings]

|  |
| --- |
|  |

# THE HANDLING OF CUSTOMER QUERIES AND COMPLAINTS

#### Specific Outcome 3

Oversee the handling of customer queries and complaints.

#### Assessment Criteria

* The procedures for handling queries and complaints are explained according to organisation's policy and procedures.
* The handling of queries and complaints is monitored and evaluated against the organisation's requirements.
* Non-compliance with standards is identified and corrective actions are taken/suggested in accordance with organisation's policy.

**Some added points on the addition of skills and knowledge in the general handling of customer queries**

### Give customers a positive impression of yourself and your organisation

* Establish effective rapport with customers
* Respond appropriately to customers
* Communicate information to others

#### Promote additional services or products to customers

* Identify additional services or products that are available
* Inform customers about additional services or products
* Gain customer commitment to using additional services or products

#### Process customer service information

* Collect customer service information
* Select and retrieve customer service information
* Supply customer service information

#### Live up to the customer service promise

* Understand and explain the promise
* Produce customer satisfaction by delivering the promise

#### Make customer service personal

* Identify opportunities for making customer service personal
* Treat your customer as an individual

#### Go the extra mile in customer service

* Distinguish between routine service standards and going the extra mile
* Check that your extra mile ideas are feasible

## Procedures for handling complaints

### **Let’s read the following article:**

***HOW TO HANDLE CUSTOMER COMPLAINTS***

***February 17, 2008 - by Kevin Stirtz***

Fifteen years ago I had a complaint at a very well known Italian restaurant in Johannesburg. I still remember how badly the employee responded to my concern. In fact, I’ve used it in my customer service seminars. It shows the power we all have to give our customers a memorable experience.

Here are some rules I teach in my seminars to help people handle customer complaints. If you and your staff follow these rules you can turn unhappy customers into loyal ambassadors for your business.

***1. Listen completely***

Give them your complete attention. Don’t multi-task. Don’t “half-listen”. Write down what they are telling you and get specifics from them. Then confirm that you understand. Focus only on them.

***2. Let them vent.***

Don’t interrupt. Don’t explain, defend or justify. They don’t care why the problem occurred and they don’t want your side of the story. They are angry and they want to vent, so let them.

***3. Apologize and mean*** ***it.***

This is often hard especially if you did not cause the problem. When you apologize in this situation you are not necessarily taking blame for causing the problem. You are apologizing for the customer having a bad experience. Put yourself in their shoes. Be sincere.

***4. Ask them how you can make things right. Then do more.***

Too many employees have either no response to complaints or a generic, stock response, like taking money off the bill. But that risk making the customer even angrier if that’s not what they want done. In fact you might even offend someone by offering them a discount. A better strategy is to ask them what they want. You have be genuine and polite. Most people don’t want much. They usually just want you to listen. But whatever they say always do it and more. For example, if they ask for their meal free your response might be “Mr. Smith, of course your meal tonight is on the house. But I’d also like to buy you and your family dinner the next time you join us. Would that be okay?”

***5. Assure them you’ll fix the problem***

Because you listened and you confirmed their complaint you know why they are upset. Take the next step and assure them you will take action to prevent it from happening again. Otherwise, why would they come back? (By the way, you need to fix the problem too.)

***6. Thank them***

Without direct customer feedback we have no idea if we are delivering the experience our customers want. When they tell us we have failed they are offering priceless information on how we can improve our business. They are telling us what we need to do to keep customers coming back. So thank them for their help. It’s a rare customer who will take the time and effort to offer feedback.

Thanking them will go a long way toward winning them back. If you and your employees handle every customer complaint using these steps, you’ll keep 99% of them coming back. You’ll have a healthier business because it keeps getting better. And we all know happy, loyal customers are the foundation of a healthy, sustainable business.

Any time you work with customers or have a client base, there is the chance that there will be a complaint about the work or a service you have provided. How you handle such complaints could mean the maintenance or loss of customers and of your good reputation. Having a prior plan of action can help turn complaints into repeat customers.

We’re all human-there’s no denying that. Being human means that we are imperfect, and as such may from time to time make a mistake. We might otherwise fall behind on our current work or be unable to meet deadlines due to a family crisis that arises. How you handle any complaints could be the make or break of you as an at home worker.

The best situation of course would be that you never received a complaint from a customer or client, and there is the possibility that in some situations, complaint could be avoided. If for instance you get sick or a situation arises at home that requires your attention at the expense of your normal working time.

You should consider how you would handle the same if you worked for a company outside of your home.

You would contact your employer, most commonly by phone to inform them that you are unable to come in. The same should apply to work at home, though obviously since you are both boss and employee it would be your customers or clients who you endeavour to contact.

Contact may be by email or telephone depending upon how you normally do business, and should be to inform customers of the problem and the possible delay in their order or work due. If you are hospitalized and unable to do this it may be wise to delegate this task to someone you trust.

This may not be enough to keep everyone happy and so you may be left facing your first complaint or lost client, and the task now becomes minimizing the damage to your reputation. An unhappy customer is much more likely to talk about their experience than a satisfied customer is.

One of a number of things may satisfy the customer and you must use your judgment as to what will help-the same applies to complaints over the standard of your products.

If a refund is requested it is often best to comply, especially if you fear the client may leave bad reviews about you online. Otherwise you may wish to see if the customer would give you a chance to make right the situation. If they refuse, stating that a refund is all that they want then offering to complete the work for free after issuing a refund may prevent there being significant ill feeling.

If the problem was with a product manufactured by you then offering a replacement may be in order, or else repairs to the faulty item. Some customers may become frustrated at being asked to return an item for repair since that requires action on their part, which would not have been necessary if you had not sent a faulty item. Accepting the loss of that item may be needed.

Avoiding complaints where possible is the best thing for your at home business, but where this isn’t possible then the aim should be to make your customer happy. In any customer service business, reputation is extremely important, so protecting your reputation must be the utmost importance.

Though this may involve the uncomfortable necessity of apologizing and eating humble pie whilst making reparation, the results of failing to do so may be very bad for business!

**Nobody** likes to handle customer complaints, and listen to disgruntled customers telling (yelling?) you in no uncertain terms what they dislike about your company, products and services. Often, this triggers a **Fight-or-Flight** response:

* **Fight:** "I'm sorry, sir, you must've misread the user manual. We cannot be held responsible for that." (It's your own fault!)
* **Flight:** "The responsible person is not in the office right now, please try again another time. Sorry we can't be of assistance right now." (And all next calls, the "responsible person" turns out the most elusive person on the planet!)

There's no need for this, if you decide that a complaint is an opportunity to **LEARN**. It's always wise to notice what your complaining customers are saying, learn your weaknesses, and act upon them. But I'd like to introduce **another** meaning to the word LEARN...

### Handle customer complaints with L.E.A.R.N.

When you are talking to a complaining customer, you could apply the LEARN-principle. You may think that the customer is calling upon you to have his troubles resolved, but this is not the customers prime drive. **First and foremost**, disgruntled customers want to be **heard**. Applying the LEARN principle makes sure they are.

L.E.A.R.N. is an acronym, with 5 easy steps to follow:

* **LISTEN** - Listen carefully to your customer. Don't interrupt or tell the customer to calm down, this will only ignite the anger.
* **EMPATHIZE** - Feel the pain of the customer, and tell her that you can understand how they feel.
* **APOLOGIZE** - Apologize to the customer, even if you feel that you have no part in the problem. Do not blame the customer, but there is no need to take the blame yourself!
* **REACT** - Decide what you will do to resolve the problem, and tell this to the customer.
* **NOW!** - Do not delay. Take immediate action! The longer you wait, the harder it is to produce outstanding customer service