**LEARNER GUIDE**

**Conduct Follow-Up With Customers To Evaluate Satisfaction Levels**

Unit standard 252214

Level 4 Credits 6

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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 252214

#### Unit Standard Title

Conduct follow-up with customers to evaluate satisfaction levels

#### Unit Standard ID

252214

#### NQF Level

4

#### Credits

6

#### Purpose

The person credited with this unit standard will be able to monitor the recording of customers order verbally as well as monitor the acceptance and recording of customers' written order. Learners will also be able to monitor the completion and administering order procedures and documentation, and confirm and distribute orders while ensuring the sales team follow up on orders and ensure that the customer is satisfied.

The qualifying learner is capable of:

* Monitoring the recording of customers order verbally.
* Monitoring the acceptance and recording of customer’s written order.
* Monitoring the completion and administering order procedures and documentation.
* Monitoring the confirmation and distribution of orders.
* Ensuring sales teams follow up on orders placed.
* Ensuring overall customer satisfaction and relationships.

#### Unit standard range

Order status including out of stock, end of line products, orders awaiting delivery, redundant stock.

* Sales Management refers to the overall management of a team of sales people involved in the selling of singular and basic products and services.
* Sales include all forms of Sales Management in a region/territory/area/department.
* Communication strategies including listening, use of questions, observation, and body language.
* Product knowledge including features, advantages, benefits, uses, technical knowledge, assembly knowledge, add-ons, special features.
* Sales Management refers to the overall management of a team of sales people involved in the selling of singular and basic products and services.
* Sales includes all forms of Sales Management in a region/territory/area/department

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

Learners accessing this unit standard will have demonstrated competence in:

* Communication at NQF Level 3 or equivalent.
* Mathematical Literacy at NOF Level 3 or equivalent.

#### Specific Outcomes and Assessment Criteria

**Specific Outcome 1:** Monitor recording of customers' orders.

**Assessment Criteria**

1. The described and demonstrated elements of the sales process in the workplace are checked in accordance with organisational and customer requirements.

2. Assessments of the competitive environment determine implications for selling techniques to be managed.

3. Customers' needs identified and goods and/or services offered checked to determine whether in line with these needs.

4. Add-on opportunities identified and communicated to customers monitored.

5. Orders clarified and details recorded accurately to the satisfaction of customers are monitored.

**Specific Outcome 2**: Monitor acceptance and recording of customers' written orders.

**Assessment Criteria**

1. Elements of the sales process are described and demonstrated in the workplace in accordance with organisational and customer requirements.

2. Assessments of the competitive environment determine implications for selling techniques to be used.

3. Confirmed orders and recorded details thereof are monitored to ensure customer satisfaction.

4. Acceptance and recording of the customers' orders are checked to ensure compliance with organisational, customer and legal requirements.

**Specific Outcome 3**: Monitor completion and the administration of orders' procedures and documentation.

**Assessment Criteria**

1. Order documentation is checked to ensure done according to organisational and customer's requirements.

2. Order administration procedures are maintained in relation to recording, analysing and reporting processes and checked in accordance with organisational requirements.

3. Order documentation information is checked and ensured to be available for reference purposes.

4. Order documentation is checked to be within agreed time frames.

**Specific Outcome 4**: Monitor confirmation and distribution of orders.

**Assessment Criteria**

1. Confirmed orders and the relevant communication to the relevant parties within the agreed time frames are checked.

2. Documentation and processes relating to confirming of orders are checked to be complete, concise and in the required format and location.

3. Relevant communication equipment used to convey and distribute orders is checked to comply with organisational requirements.

4. Order deliveries aligned with customer delivery schedules and delivery times booked are monitored.

5. Variances in the orders that are identified and corrective action taken are checked.

**Specific Outcome 5**: Ensure sales team follow-up on orders placed.

**Assessment Criteria**

1. Good customer relations are monitored through awareness of order status.

2. Order documentation is checked to confirm whether reconciled and processed in accordance with organisational requirements.

3. Order administration procedures and systems are monitored to ensure adherence with company policies.

4. Variances in orders placed and orders received by the sales team are managed.

5. Damaged goods uplifted inline are checked against organisation requirements.

**Specific Outcome 6**: Manage overall customer satisfaction levels and relationships.

**Assessment Criteria**

1. Processes that establish communication with customers in accordance with company requirements are monitored.

2. Product and service support provided that is consistent with identified customer needs and the resources of the organisation are monitored.

3. Opportunities for feedback from all stakeholders are monitored in relation to maintaining and improving customer satisfaction and relationships.

4. Methods and techniques that provide for the ongoing identification of customer satisfaction are checked in accordance with established requirements.

#### Unit Standard Essential Embedded Knowledge

* Methods, techniques and elements for conducting order transactions.
* Systems, policies and procedures for processing order documentation.
* The industry, the product and the industry role players.
> Range: This knowledge will apply to the particular economic sector in which the learner is learning. Moderation of this aspect will therefore need to be carried out by the relevant Educational and Training Quality Assurance Body (ETQA).
* Methods and techniques for following up outstanding and back orders.
* Methods and techniques for responding to customer needs and requests.
* Methods and techniques for measuring and evaluating customer satisfaction levels.
* Methods and techniques for improving customer satisfaction levels.
* Methods and techniques for communicating with individual customers and groups of customers.
* The industry, the product and the industry role players.
> Range: This knowledge will apply to the particular economic sector in which the learner is learning. Moderation of this aspect will therefore need to be carried out by the relevant Educational and Training Quality Assurance Body (ETQA).

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

|  |
| --- |
| **UNIT STANDARD CCFO IDENTIFYING** |
| Identify and solve problems pertaining to the way the sales team reacts to issues around orders, deliveries and stock in an organisation.  |
| **UNIT STANDARD CCFO WORKING** |
| Work effectively with others in order to ensure that all problems and queries related to orders and incomplete orders are processed.  |
| **UNIT STANDARD CCFO ORGANISING** |
| Organise oneself and one's activities so that alternative strategies exist in the event of order/delivery related problems occurring.  |
| **UNIT STANDARD CCFO COLLECTING** |
| Collect, evaluate, organise and critically evaluate information so the teams customer satisfaction problems are solved.  |
| **UNIT STANDARD CCFO COMMUNICATING** |
| Communicate effectively with sales teams when dealing with customers and suppliers regarding delivery of goods problems.  |
| **UNIT STANDARD CCFO DEMONSTRATING** |
| Understand the world as a set of related systems in that order delivery problems impact on customer satisfaction and loyalty.  |

# MONITOR RECORDING OF CUSTOMERS’ ORDERS

#### Specific Outcome 1

Monitor recording of customers’ orders.

#### Assessment criteria

1. The described and demonstrated elements of the sales process in the workplace are checked in accordance with organisational and customer requirements.

2. Assessments of the competitive environment determine implications for selling techniques to be managed.

3. Customers' needs identified and goods and/or services offered checked to determine whether in line with these needs.

4. Add-on opportunities identified and communicated to customers monitored.

5. Orders clarified and details recorded accurately to the satisfaction of customers are monitored.

## Elements of the sales process



Above are the 9 steps to illustrate the elements of a sales process.

1. New opportunity (or initial contact)

2. Initial communication (or assessment of the fit criteria)

3. Fact finding (or sales lead identification)

4. Develop solution (or needs identification)

5. Propose solution (or qualified prospect)

6. Solution evaluation

7. Negotiation

8. Purchase order (or closing the sale)

9. Account maintenance (and follow-up)

All of these elements should be visible when written orders from customers are taken and processed.

### 1. New opportunity (Initial contact)

A verbal order from a customer can be a great new opportunity in the sense that it is a new contact which the business has. The fact remains that a verbal order has more threats than a written order due to the fact that a verbal order is easily misunderstood and the customer can change his/her mind without any repercussions for the customer. It is still important that this new opportunity and initial contact should be treated with the utmost respect in order to retain the customer in the business.

### 2. Initial communication (Assessment of the criteria)

Once the first stage of the verbal order is completed, it is time to assess the criteria in order to establish if the customer is fit to be a customer. This is the stage where the customer would be undergoing some checks, for example a credit check if it is an account customer. If it is a cash customer the ideal would be that the customer pays 50% deposit before the job starts or before the products/services are delivered, and the rest of the money (remaining 50%) on completion or receipt of the job, products or services. Communication between the sales person and the customer should take place at this stage and the sales person should be able to answer all the customer’s questions. The danger of a verbal order is that the customer can decide not to purchase anymore, and then the business has spent a lot of money on the products/services etc. In this case the ideal would be to ask for a 50% deposit in order to protect both the business and the customer.

### 3. Fact finding (Sales lead identification)

At this stage it happens that the sales person gets some facts out of the customer. To identify the lead/s which caused the customer to choose this business to purchase from is one of the most important facts which the sales person should be able to identify. This will enable the sales person to focus on those leads and establish how many customers actually make use of that specific lead. If it is a good lead, the business can decide to spend some more time and money on that specific lead due to the fact that it assists the business to gain a lot of customers. The difference between a verbal order and a written order regarding leads is that it is easy to identify the written order’s lead due to the fact that there most probably is a section on the application or order form where the customer is requested to identify the lead/s. With verbal orders the customer has to be asked when communication takes place.

### 4. Develop solutions (Needs identification)

Now is the stage to identify exactly which products/services the customer is interested in purchasing. The customer’s needs can only be identified if communication takes place. By asking questions it enables the sales person to develop solutions. An example of a solution would be when there is no stock of a specific product that the customer wishes to purchase, then the sales person can either order new stock, for which the customer will have to wait a while longer, or suggest an alternative to the customer. Due to the fact that this would be a verbal order, the sales person should be 100% sure that the customer will purchase the products/services.

### 5. Propose solution (Qualified prospect)

By now the sales person should be almost 100% sure that the customer will pay a deposit and any issue/s regarding stock should be sorted out. By now the customer should be a qualified prospect, and all solutions should be communicated to the customer.

### 6. Solution evaluation

Once all of the steps above have been successful, it will be possible to evaluate all the solutions to possible queries or problems which were evident. If the solutions were effective and both the customer and the sales person agreed on the solutions, proceed to step 7.

### 7. Negotiation

This is a very important step in the sales process and one of the most important sales elements. Negotiation between the customer and the sales person should suit both parties otherwise the whole sale can be lost. It is a certainty that the customer will ask the sales person what he/she wants regarding price etc. If the customer asks for discount, a discount should be negotiated, but if the customer do not ask for discount and it is a big purchase, the sales person should offer a discount in order to ensure that the customer will return for more business.

### 8. Purchase order (Closing the sale)

Closing the sale is almost as important as the initial contact with a customer. If the sale is not properly and professionally closed, the customer will remember this and will either cancel the deal or decide not to return to the business in future. Some sales people make the mistake of, once the sale has been closed and finalised, they forget about the customer and do not make an effort to do the rest of the paperwork etc. This often causes products/services not being delivered due to the fact that the sales person did not give the order through to the appropriate people once the sale was finalised. This should never occur and sales people should be trained to see a sales transaction through right to the end.

### 9. Account maintenance (Follow-up)

Follow-up is probably one of the most important sales elements. A customer will feel special and valued if he/she receives a phone call enquiring if he/she is satisfied with the product/service. This will ensure that the customer will return to the business for future purchases.

## The competitive environment and its implications for selling techniques

### How to assess the competitive environment

While sales-ready Internet leads from Networks are an excellent source of business prospects, they introduce new challenges to a sales team. The biggest challenge is finding a way to differentiate their service from competitors. Prospects are looking to comparison shop vendors. This generally means that they want a few quotes so that they can find the best solution for their situation.

In order to best position your company against the competition, you need to develop your own Unique Selling Position (USP). This is what differentiates your business. It should be the focus of all your marketing and sales efforts. It might be service, price, selection or any other factor that separates you from other solutions.

To create a USP requires committing to a careful analysis of your business, including examination of your products and services, your market, your position in the market, and your business's strengths and weaknesses. Commonly known as a SWOT analysis.

A SWOT (**S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats) analysis builds on the information you gathered in step two and identifies the major strengths, weaknesses, opportunities and threats with which your organisation is faced.

|  |  |
| --- | --- |
| **S** | **STRENGHTS** |
| **W** | **WEAKNESSES** |
| **O** | **OPPORTUNITIES** |
| **T** | **THREATS** |

#### *****Know your business*****

A marketing analysis is best performed by including your key employees in a brainstorming session. Their frontline experience will help you develop a realistic understanding of your business. You should examine strengths and weaknesses in the following areas:

* Profitability
* Product Quality
* Customer Service
* Productivity
* Financial Resources
* Operations
* Distribution

You might consider asking open ended questions like: Are we losing or gaining customers? Are we losing or gaining market share or maintaining the status quo? Are we losing or gaining sales volume? Are we experiencing cash flow problems? What is our employee turnover? Are we letting a competitor set the pace?

#### Know the market

Next, look at external business environment. These areas include current customers, prospects, competitors, technology, political climate, government and other regulatory organizations, and the economic environment. For example, consider how desktop publishing revolutionized the typesetting and printing industries, and how the events of 9/11 and the Internet have challenged the trade show industry.

To begin your analysis, select five strengths and opportunities, and five weaknesses and threats. Knowing these will help you identify and develop marketing strategies. For example, do you have an area of expertise worth promoting? Are you undercapitalized? Is your market growing or shrinking?

#### Know your competition

Those pesky competitors are perhaps the biggest impediment to achieving your marketing goals - yours is not the only business looking to your target markets for the next sale. Start assessing the competitive environment by identifying your immediate competitors. Who are they? What do they do better than you? What do you do better than them? Are they investing in research and development, a new product line or technology? What are their target markets? What image are they trying to project? Are they heavily in debt?

You can quickly determine your position in the marketplace by identifying the unique selling proposition of your products and services. What makes your product or service stand out from the competition? Is it quality, price, convenience, style, location or professionalism? The goal is to develop an image in the marketplace that you offer something special that your competitors do not.

Remember to be thorough in assessing the competition. Start by gathering these basic facts about your five largest competitors:

* Business Name and Address
* Who are the key employees?
* How many employees are on the payroll?
* How many years have they been in business?
* What are annual sales? How many units?
* What share of the market do they own?
* Who are their key customers?

Supplier relationships are a good source of competitive intelligence. There is nothing sneaky or unethical about gathering and using information. It's part of being in business.

There are a number of ways to obtain information on the competition – from the scanning of financial and trade publications or hiring a clipping service, or simply searching on the Internet.

Maintaining files on the five most direct competitors can yield big dividends for a relatively small amount of time and energy. Place every bit of information you can glean in the files. Clip advertisements and articles about their products or employee promotions. Want ads can help you estimate growth and track key personnel changes. Clip anything that gives you a handle on their positioning or pricing strategies. Attend trade shows or trade association meetings, and gather brochures and other collateral material they are distributing. Visit their websites often to stay abreast of expanding lines or new product introductions.

Once a month, spend a few minutes reviewing your files to determine if patterns are developing. Track how often your competitors advertise and in which publications. Study their advertising message to determine their positioning strategies. Look at the image they are conveying to determine their target markets. Some questions to consider during competitive intelligence gathering include: Is your competitor purchasing additional property? Building a new facility, or closing one? Developing a new image? Changing its positioning or pricing strategy? Redesigning products? Conducting professional or market research? Expanding markets or abandoning them? Increasing or reducing advertising frequency?

You can use a simple form as a quick reference on your position versus that of your competitors. This form has three columns: customers want; competitor provides; and we provide. Place the following items (and add your own for your particular market) under the customers want category - quality, low price, high price, wide product line, deep product line, product information, reliability, warranty, location, just-in-time delivery, accessories and spare parts, and well-trained technicians - then let your analysis determine how you fill in the next two columns. Any field that there is a hole is an opportunity to exploit.

## Identify customer needs and offer goods/services to determine whether it is in line with the needs

A customer calls on you is because they have a need for your product or service. When you are out in the field trying to generate business you have to provide a need. The need is the reason. Finding that reason to buy, filling that need is the essential purpose of sales itself. Without a need for your product, you won’t have sales

If the sales job you’re in requires that you go out seek potential clients, then you have to practice finding a way to create the need. Whether it's to replace an existing service or supply a product that may be requested later, creating the need becomes critical if it cannot be identified in asking questions. We will discuss not only how to identify a customer need but also how to create a customer need.

Whether your business involves inbound or outbound sales, you have to ask questions in order to procure a need for your product or service. Let’s discuss the process which is based on the sales environment.

For example, an inbound sales position, such as retail or call center, generally dictates that the customer is going to identify their needs early in the call. "I'm here to find a cordless screwdriver." The need is exposed. It's not enough to just lead them to a display, start pointing and say something like "Here they are. This one is on sale. This one has a back up battery..." This is the epitome of being task oriented and letting your customer know you have better things to do.

Probing for specific needs is what truly identifies a need. "What kinds of work are you thinking of doing?" Now effective listening comes back into play and you analyse the specifics of the need. This then allows you to point out product specifics (features) and how it will work for their specific needs (benefit). Asking, listening, analysing, and feature and benefiting are how you gain commitment.

If you're in an outbound sales environment you need to know how to create a need. Soliciting business without having a question plan is like showing up at a black tie affair in a Halloween costume. Your not prepared, you may end up embarrassed and the more people you meet, the more uncomfortable you feel.

For this example, we'll use insurance. "Mr. Smith I understand you have a policy with ABC Company. You mentioned you have been with them for several years, and you are content with their level of service. I asked you about any future plans and you mentioned that you were going to be a grandfather soon. Again congratulations, but I wanted to ask you, if I can offer the same price that you pay now, with slightly more coverage so that you have the ability to take care of those you leave behind, would that interest you?”

Successfully creating needs takes a full on concentrated effort. You need to know how to feature & benefit, probe, listen, and create a need. Even if it's just for the purpose of future sales, creating a need shows a customer that you have their interest in mind.

## Add-on opportunities

Add-on sales are when the sales person sells more products/services to the customer than which the customer intended to purchase. An example of this in a construction business would be when a customer requested that he/she wants to have the electrical wiring changed in his/her house, and the sales person tells the customer that they can also make it child safety. Where the customer initially only wanted one service, the sales person persuaded him/her to purchased an add-on service which means more turnover for the business. Another word for add-on sales is up selling.

Taking advantage of opportunities to generate add-on sales to your customers is a straight forward way to grow. Up selling is the strategy of selling additional goods and services to customers just before they complete their purchase.

What else might you sell a customer at the point of sale? To what extent does the idea of up selling apply to your business and what are some opportunities for you to do this?

Everyone is familiar with the fast food version of this. “Would you like fries with that?” However, this may be used effectively with almost all businesses.

Up selling doesn’t only apply in retail settings; it applies to sales situations in almost all different industries.

Here are some examples of up selling:

If you are an architect, you can offer 3-D modeling, in addition to your basic service. This might be very useful to a developer, to aid in the sales process.

An interior designer who also buys furnishings on behalf of a homeowner may provide a listing of the furniture purchased, complete with pricing, warranties, care instructions, etc.

A computer company may offer a similar service, documenting all the computers, servers and programs at a customer’s location … as a valued addition to their regular maintenance service.

Once you create an “upgrade” option, describe it in a way that helps customers justify the additional expenditure in their minds. The key is to build a higher perceived value into the product, then use an up selling script or story to communicate that higher value.

Perhaps the easiest up sell of all is maintenance contracts; technical support, warranties, and other long-term contracts that help customers maintain the value of their purchase and protect themselves from loss. This includes the loss of time, as in the case of technical support.

When writing your up selling story, be sure to get agreement from the customer by adding phrases like, “Shall I set it aside for you?” “Would you like to schedule that right now?” “Can I add that to your order?”

Remember: You will only generate extra income if you get the customer’s buy-in at the time of purchase. That’s the best time to add-on, when the wallet is already out.

## Accurately clarify orders and record details

Once the selling process is done, it is time to physically take orders from customers. It is crucial for any business to have a good administration system in order to have records of customer orders. Without these records it won’t be possible to actually deliver the orders to customers, it won’t be possible to even see if they have paid or not. It is important to clarify the order once the order was placed so that there will be no confusion in future. The best way to clarify an order is to repeat the order to the customer. If for example, the customer ordered 1000 bricks, the sales person should ask the customer if the correct amount of bricks he/she ordered are 1000. If the customer says it is correct, then it needs to be recorded on a format which is according to company procedures and policies. An order should not be recorded on a piece of paper due to the fact that it can get lost, and then the whole order and sales transaction will be lost altogether. A construction business should have a computerised system or a manual system in order to record orders. This will be discussed in detail under the next Assessment Criteria.

# MONITOR ACCEPTANCE AND RECORDING OF CUSTOMERS’ WRITTEN ORDERS

#### Specific Outcome 2

Monitor acceptance and recording of customers’ written orders.

#### Assessment criteria

1. Elements of the sales process are described and demonstrated in the workplace in accordance with organisational and customer requirements.

2. Assessments of the competitive environment determine implications for selling techniques to be used.

3. Confirmed orders and recorded details thereof are monitored to ensure customer satisfaction.

4. Acceptance and recording of the customers' orders are checked to ensure compliance with organisational, customer and legal requirements.

## Demonstrate elements of the sales process in the workplace

A sales process is also known as a sales tunnel or a sales funnel. It is a systematic approach to selling a product or service. The three main reasons for having a sales process are to include seller and buyer risk management, customer interaction in sales, and revenue generation. A sales team’s fundamental job description is to move a greater number of larger deals through the sales process in less time.

Let’s now discuss the elements of a sales process regarding written orders.

In the previous section we discussed the 9 steps to of a sales process.

1. New opportunity (or initial contact)
2. Initial communication (or assessment of the fit criteria)
3. Fact finding (or sales lead identification)
4. Develop solution (or needs identification)
5. Propose solution (or qualified prospect)
6. Solution evaluation
7. Negotiation
8. Purchase order (or closing the sale)
9. Account maintenance (and follow-up)

All of these elements should be visible when written orders from customers are taken and processed.

#### 1. New opportunity (Initial contact)

An effective sales process can be described through steps that walk a salesperson from meeting the prospect all the way through closing the sale. The initial contact a sales person will have with a customer who placed a written order would be by actually seeing the order on paper, e-mail etc. This is the initial contact and the sales person should be able to identify if the customer qualifies for the order which was placed.

#### 2. Initial communication (Assessment of the criteria)

Once the customer has placed the written order, it should be possible to assess if the customer fits the criteria necessary to purchase the order. If the customer wants to purchase on account, it will be essential to verify the customer’s credit history and credit record/s. The initial communication will also allow the sales person to identify the products/services ordered and see if it is available. If it is not available it will give the sales person enough time to order the products/services or make alternative arrangements.

#### 3. Fact finding (Sales lead identification)

It is easy with a written order to find facts. Although, it won’t be possible to identify the lead/s which caused the customer to order if the business did not include such a section in the application form. A good idea is to include a few basic questions at the end of the application form where customers must fill in questions for example who introduced them to the business, are they first time customers, etc.

#### 4. Develop solutions (Needs identification)

On the written order form the sales person will be able to identify the customer’s needs and develop solutions. The customer will state which products/services he/she is interested in and through that the sales person can identify if the products/services are available and possible to deliver. If not, the sales person can make alternative suggestions/solutions for similar products/services.

#### 5. Propose solution (Qualified prospect)

Now is the time when a sales person will have the first contact with the customer. By this time the sales person should have identified if the prospect is qualified and if it is not possible to deliver the product/service which the customer requested, the sales person can propose possible solutions and/or alternative products/services to suit the customer’s needs.

#### 6. Solution evaluation

The salesperson should now evaluate the solution and communicate it to his/her supervisor/manager. The solution should also be communicated to the customer in order to assure the customer that everything regarding the written order is possible to do. If the customer is not happy about the solution, other solutions should be introduced to the customer until a solution can be find which suits the customer and the sales person.

#### 7. Negotiation

Negotiation is a very important step in the sales process. This is where a customer would negotiate for the best possible price, and the sales person would try his/her level best to accommodate the customer without loosing profit for the business. If a customer is offered a discount, it will ensure that the customer will become a regular customer. A regular customer becomes a loyal customer.

#### 8. Purchase order (Closing the sale)

Once the solutions are evaluated and negotiation took place, and both were successful, it is time to close the sale. All steps of the sales process should be successful before a sale can be closed. Closing a sale does not mean that it is the end of the sale for the customer and the business – if this is the case there are serious customer service problems in that business. If a sale is successfully and professionally closed, it would assure future business from the customer’s side.

#### 9. Account maintenance (Follow-up)

Follow-up is vitally important. The sales person should follow-up on various aspects regarding the customer’s written order for example, was the stock delivered, was the stock delivered on time, was the correct stock delivered, was payment received from the customer before or on delivery of the product/service, etc. If a sales person contacts a customer after the completion of the sale, the customer will feel valued and important. This is what every business should aim for.

## Assess the competitive environment and its implications for selling techniques

We have discussed the competitive environment and selling techniques regarding verbal orders in Specific Outcome One. There is not much difference between the competitive environment when it comes to verbal and written orders because the competitive environment remains the same for the business.

In Specific Outcome Two we will discuss the effect which the SWOT analysis has on the competitive environment and regarding selling techniques.

It is possible for the SWOT analysis to assist in competitive assessment and selling techniques. Let’s discuss exactly what the SWOT analysis is, and then we will discuss how it can assist in competitive assessment and selling techniques.

### What is the SWOT analysis

External assessment of competitors consists of obtaining strategic market intelligence and interpreting the threats and opportunities it poses:

* PESTLE analysis: Political, economic, social, technological, legal and environment trends
* Competitive forces: Rivalry amongst competitors, buying power of buyers and suppliers, threat of new entry and substitution
* Industry structure: Commercial chain from supplier to consumer, including competitor and customer analysis
* Market size and growth rate; market segmentation
* The SWOT analysis

A SWOT analysis is a strategic planning method used to evaluate the Strengths, Weaknesses/Limitations, Opportunities and Threats of a project or a business venture, but it can also be used to determine the same of a business’s competitors. By having this information it is possible for a business to use the competitor’s strengths and opportunities in order to determine new and successful selling techniques. The SWOT analysis specifies a business’s objectives and identifies the internal and external factors which are favourable and unfavourable to achieve those objectives.



### The SWOT analysis with its four elements in a 2x2 matrix

Let’s discuss the strengths, weaknesses, opportunities and threats individually:

* **S**trengths: characteristics of the business, or project team that give it an advantage over others
* **W**eaknesses (or Limitations): are characteristics that place the business at a disadvantage relative to others
* **O**pportunities: **external** chances to improve performance (e.g. make greater profits) in the environment
* **T**hreats: **external** elements in the environment that could cause trouble for the business or project

Questions should be asked and answered that generate meaningful information for each category of SWOT in order to maximise the benefits of this evaluation and find their competitive advantage.

#### Matching and converting

Another way that SWOT is being used for is matching and converting.

* Matching is to find competitive advantages by matching the strengths to opportunities
* Converting is when conversion strategies are applied to convert weaknesses or threats into strengths or opportunities

An example of a conversion strategy would be to find new markets. If the threats or weaknesses of that market can not be converted into strengths or opportunities; the market should avoided.

####  Internal and external factors

The main purpose of the SWOT analysis is to identify the key (important) internal and external factors that are important to achieve the objective. These key internal and external factors come out of the business’s value chain. Key pieces of information are grouped into two categories:

1. Internal factors: The strengths and weaknesses internal to the business
2. External factors: The opportunities and threats presented by the external environment to the business

Internal factors can be seen as strengths or weaknesses depending on their impact on the business’s objectives. What represents strength to one objective might be a weakness to another objective. These factors may include all of the **6 P’s**:

|  |  |
| --- | --- |
| **P (1)** | **PRODUCT** |
| **P (2)** | **PRICE** |
| **P (3)** | **PEOPLE** |
| **P (4)** | **PROMOTION** |
| **P (5)** | **PLACE** |
| **P (6)** | **POSITIONING** |

It can also include personnel, finance, manufacturing capabilities etc.

The external factors include macro-economic matters, technological change, legislation, and socio-cultural changes, as well as changes in the market place or competitive position.

####  Marketing

In competitor analysis, marketers build detailed profiles of each competitor in the market, focusing especially on their relative competitive strengths and weaknesses using the SWOT analysis. Marketers will examine the competitor’s cost structure, sources of profits, resources and competencies, competitive positioning and product differentiation.

Some of the most popular techniques to conduct market research include:

* Qualitative marketing research such as focus groups
* Quantitative marketing research such as statistical surveys
* Experimental techniques such as test markets
* Observational techniques such as ethnographic (on-site) observation
* Environmental scanning and competitive intelligence processes to help identify trends

Let’s look at an example of a SWOT analysis done on the competitor’s customer service regarding add-on sales:

|  |  |  |  |
| --- | --- | --- | --- |
| **STRENGTH (OF THE COMPETITIVE BUSINESS)** | **WEAKNESS (OF THE COMPETITIVE BUSINESS)** | **OPPORTUNITY (TO THE BUSINESS WHO DOES THE SWOT ANALYSIS)** | **THREAT (TO THE BUSINESS WHO DOES THE SWOT ANALYSIS)** |
| Great success in add-on sales during the past year which resulted in an enormous increase in turnover | Shortage of sales people to handle customers orders  | Concentrate on training our sales people to promote add-on sales | Busy to rule the business world which will lead to this business to loose selling opportunities |

### How the SWOT analysis assists in competitive assessment and selling techniques

|  |  |  |
| --- | --- | --- |
| swot analysis 4 | ASSESS COMPETITIVE ENVIRONMENT | ASSIST IN SELLING TECHNIQUES |
| STRENGHT | The SWOT analysis enables a business to assess the competitive environment by identifying its strengths which enables the competitive business to be ahead of the business. By knowing the strengths of a competitor, a business can focus on it and ensure that its own weaknesses become strengths | Selling techniques are very important in every business. A business can do a SWOT analysis on itself and identify the strengths regarding its selling techniques. This will enable the business to identify the strengths in its selling techniques and maintain and retain those selling techniques.  |
| WEAKNESS | The SWOT analysis enables a business to identify the weaknesses of a competitive business. By knowing the weaknesses of the competitor enables the business to use the opportunity to turn the competitor’s weaknesses into its own strengths | The SWOT analysis enables the business to identify the weaknesses in its selling techniques. If one of the weaknesses is that sales people need training in selling skills, this will become clear once a SWOT analysis was done. If sales people are demotivated and this leads to poor selling techniques, this will also become evident through a SWOT analysis |
| OPPORTUNITY | The SWOT analysis assists the business to identify opportunities in the market by identifying the lost opportunities of the competitor.  | The SWOT analysis enables a business to identify opportunities regarding sales techniques. By searching the web businesses can come across great new and inventive ideas regarding selling techniques. These opportunities are to be turned into strengths |
| THREAT | The SWOT analysis allows the business to see which treat/s the competitor has for it. By being aware of threats, the business is able to act fast and ensure that it is ready to take action if a competitor is a threat in any area of business | The SWOT analysis will assist the business in identifying the different threats which can lead to unsuccessful selling techniques. Threats could include a lack in trained sales people, competitors who are one ahead of the business regarding selling techniques, etc. |

## Confirm orders and record details to ensure customer satisfaction

It is important to confirm a written order received from customers. Written orders include the following:

* Orders received by mail
* Orders received by e-mail
* Orders received via internet

Once these written orders have been received in a construction business the details of the order needs to be recorded. It is vitally important that these details are recorded as soon as the written order has been received in order to ensure that there is no risk of customers not being attended to.

The sales person must confirm the details on the written order and if any uncertainties occur, the sales person must contact the customer immediately in order to clear the uncertainties. Uncertainties may include incomplete postal and residential address, not enough employment details, no identity number, uncertainty regarding the products/services being ordered, etc. Once the written order has been confirmed and the details have been recorded, the sales person must record the sales transactions in order to match the customer’s needs and requirement which we will discuss under the next heading.

## Check acceptance and recording of customers’ orders

Acceptance and recording of the customers' orders are checked to ensure compliance with organisational, customer and legal requirements.

### Organisational requirements

Organisational requirements regarding accepting and recording customer’s written order/s are that the order must be clear and legible; the customer must have a clear credit record; and the order must be within the ability of the business to deliver the order. The organisation can request the customer to pay a deposit upfront before delivery of the order takes place, especially if the customer has a poor credit record.

### Customer requirements

The customer’s requirements regarding accepting and recording written orders are that the customer can insist on speedy delivery once the order has been processed and approved. The customer can also request discount, especially if it is a big order worth a lot of money. The customer has the right to professional service from the organisation at all times. If the customer is not satisfied with what he/she ordered, for example the quality of the product etc, the customer has the right to cancel the order and ask for a refund.

### Legal requirements

The legal requirements regarding accepting and recording written orders are that the organisation has the right to ask for a deposit and the customer has the right to ask for discount. Other legal requirements include that the customer has the right to cancel the order if he/she is not satisfied with the order. The organisation has the right to deny cancellation of an order if everything has been delivered according to the customer’s requirements.

# MONITOR COMPLETION AND THE ADMINISTRATION OF ORDERS’ PROCEDURES AND DOCUMENTATION

#### Specific Outcome 3

Monitor completion and the administration of orders’ procedures and documentation.

#### Assessment criteria

1. Order documentation is checked to ensure done according to organisational and customer's requirements.

2. Order administration procedures are maintained in relation to recording, analysing and reporting processes and checked in accordance with organisational requirements.

3. Order documentation information is checked and ensured to be available for reference purposes.

4. Order documentation is checked to be within agreed time frames.

## Check order documentation

We have discussed in Specific Outcome One that there are two ways to place orders: Manual orders and computerised orders. In Specific Outcome Three we will discuss the process of completing and administering the orders. We will discuss the procedures and documentation required for the successful completion of orders.

Let’s start with the manual order form and discuss the important points to remember when completing the form.

* Sales people should always ensure that order documentation is completed in full, each section required should be completed
* The date on the order documentation is very important due to the fact that this will indicate the time it took from the order was received until the actual delivery date
* Order documentation should be neat and legible
* Stock numbers and descriptions should be entered on the order documentation in order to cross refer the order with the physical stock
* The name of the sales person who took the order and assisted the customer should appear on the order documentation
* The contact number/s of the customer should appear on the order documentation in order to be able to contact the customer if necessary
* The price/s of stock should be listed individually and the total of the whole order should appear on the order documentation
* The order documentation numbers should be in numerical order
* Order documentation should be completed in triplicate. The original should be send to the customer on delivery of the order, the second copy should be filed with the delivery note, and the third one should remain in the order book.

When completing computerised orders the same rules apply as above. The only difference is that two copies of the completed order should be printed, one should be send to the customer on delivery of stock, and the second one should be filed with the delivery note.

Example of a manual order form.



**Example of a computerised order form:**



## Maintain order administration

When maintaining order administration procedures we need to follow these three processes:

1. Recording processes according to organisational requirement
2. Analysing processes according to organisational requirements
3. Reporting processes according to organisational requirements

### 1. Recording processes according to organisational requirements

The recording processes of order administrative procedures should be according set organisational requirements. This includes the training of sales people in order to know exactly how to complete the order documentation and record all necessary information on the order documentation. Whether it is a verbal order, a written order or a computerised order, the same rules should apply when recording the order. The recording of orders should be maintained in order to ensure that it is 100% correct. The recording processes should be monitored on a regular basis in order to ensure that all information on order documentation is clear, legible and correct. If this is not done it could lead to customers receiving incorrect stock due to stock numbers which were incorrectly written on the order documentation. Every business should have an administrative assistant whose main job description is to check and audit all administrative procedures on a daily basis. This will ensure that all administration is up to date at all times and accurate at all times for when an actual audit occurs. This will also ensure that the whole recording procedure of order documentation will be accurate. Another purpose would be that no mistakes regarding incorrect delivery of orders will occur in the event where stock numbers or customer information is incomplete or incorrect due to the fact that the administrative assistant will check and verify all the information on the order documentation.

### 2. Analysing processes according to organisational requirements

The analysing processes of order administration should be done according to organisational requirements. Organisational requirements should include that analysing should take place on a regular basis in order to ensure that nothing regarding the order is left out or missed. The administrative assistant should analyse all information on the order documentation in the finest detail in order to check for accuracy. The manager/supervisor should also analyse the flow and speed of the order to ensure that deliveries of orders are on time and that the correct stock is delivered according to the customer’s specifications. By analysing the process of order documentation it allows the business to ensure that no mistakes occur and if it may happen that there is a mistake, it can be solved and corrected immediately. By analysing the order process it is possible for a business to recognise errors and loopholes and therefore prevent future errors and loopholes to occur. It is also possible to recognise successful operational functions which can be made into company policies and procedures which can assist the business to function successful in future.

### 3. Reporting processes according to organisational requirements

In every business it is important to report processes and progress to the appropriate management/supervisor. It doesn’t matter whether it is a big order or a small order, the fact remains that every customer’s order is important. Sales people should realise that small orders could become big orders in future and should be handled with the greatest of care. Another important reason why reporting is so crucial in a business is that if something goes wrong, the manager/supervisor will be aware of it and will be able to act immediately. From the moment the order occurs up to the moment it is delivered to the customer, the whole order process should be reported in order to ensure that everything went smooth and according to organisational procedures.

## Check order documentation information

Order documentation should be recorded in the required format according to organisational procedures and it should be kept for future reference purposes. There is always a possibility that something can go wrong with an order and for that reason it is important to record the order documentation information and have it available. Each business has its own format in which documentation should be completed. In a construction business it is important to ensure that the documentation is of a professional format, whether it is a manual order or a computerised order. It should be easy for everyone to understand and all sales people should be trained on how to complete and record order documentation. Order documentation should always be completed in triplicate (manual orders) where one copy will be send to the customer together with the order when it is been delivered, the second copy must be filed, and the third copy remains in the order book. By doing it like this it will ensure that there is always enough copies of the original order available for reference purposes.

## Check order documentation within agreed time frames

The biggest complaint that customers have is that their orders are not being dealt with in a specific timeframe as promised by the company. These timeframes should be according to company policies and procedures. All construction employees should be fully trained in this and it should be emphasised on a regular basis. Timeframes should exist of the following:

* Timeframes should be specific
* Timeframes should be measurable
* Timeframes should be reasonable
* Timeframes should be reachable

#### Timeframes should be specific

When a sales person can not deal with a customer order right away and needs to return the call, the sales person should give the customer a **specific date and/or time** when the sales person will get back to the customer with the required information. The most unprofessional thing to do is promise a customer that you will return a call and not do it. The company’s name will be drawn through the mud if the customer eventually has to contact you. Sales people should always keep to their promise to get back to a customer on the specific date and/or time.

#### Timeframes should be measurable

A company and its employees should be able to measure their timeframes against other businesses and/or competition. Find out what a universal approach regarding timeframes are, and adapt it to your business. To measure something in business means to compare what you are doing and what the next business are doing. By comparing your business will be able to identify their rights and wrongs, then maintain the rights and fix the wrongs. If we fail to measure our timeframes against other businesses, we will not be able to identify what and where we are going wrong, and we will simply assume that we are right. This can have devastatingly effects on a business’s customer service.

#### Timeframes should be reasonable

A sales person should be trained never to over- promise and under-deliver. This means that the sales person should never put him/herself in a situation where he/she promised to return a call to customers on a specific date and/or time, and not be able to do it. The sales person should be reasonable with him/herself and with the customer when giving a specific date and/or time. If you can return the call to the customer faster than you’ve promised, this will ensure that the customer gains trust in the company and its service. You will “Wow” the customer. This means that you’ve exceeded his/her expectations.

#### Timeframes should be reachable

A sales person can not, for example, promise to return a call to a customer on a day that the business is closed or when the sales person goes on lunch. This is not reachable and totally impossible. Sales people should be aware of trading hours, days that the business is not operating and even public holidays. A sales person should always have a diary and a calendar at his/her desk in order to be aware of unreachable days and to make notes and reminders.

# MONITOR CONFIRMATION AND DISTRIBUTION OF ORDERS

#### Specific Outcome 4

Monitor confirmation and distribution of orders.

#### Assessment criteria

1. Confirmed orders and the relevant communication to the relevant parties within the agreed time frames are checked.

2. Documentation and processes relating to confirming of orders are checked to be complete, concise and in the required format and location.

3. Relevant communication equipment used to convey and distribute orders is checked to comply with organisational requirements.

4. Order deliveries aligned with customer delivery schedules and delivery times booked are monitored.

5. Variances in the orders that are identified and corrective action taken are checked.

## Confirm orders and the relevant communication to the relevant parties within the agreed time frames



If we look at the diagram above, we will see the whole process of orders, from the actual placing of the order, right up to the delivery of the order to the customer. Taking orders, either verbal or written from customers are a long process and each step should be handled with care. Once the order has been confirmed, it should be communicated to the relevant parties within the agreed timeframes which are usually as soon as possible. The order should be confirmed with the customer and the distribution centre. This should be done within agreed timeframes according to organisational policies and procedures.

It is important to let the customer know the process and flow of the order. From the first interaction with the customer right up to after the actual delivery of stock (after sales care). In the beginning the sales person should inform the customer whether the order has been approved or not. As soon as the order has been approved and confirmed, the sales person should then place the order and also communicate this to the customer. On delivery of stock, the customer should be informed when and where the stock will be delivered. Once the stock has been delivered, the sales person should contact the customer and enquire if everything is in order. This will ensure that the customer will return for more orders.

## Check documentation and processes relating to confirming of orders

As soon as the order as been confirmed, there are documentation to be completed and processes to be followed. The order documentation which was originally completed should be attached to the documentation which verifies that the order is confirmed. As soon as the documentation is completed and confirmed, the next step would be to inform the stock department that the order has been confirmed and the stock should be send to the customer. The original order documentation should be send to the stock department and should be attached to the stock which will be delivered to the customer. If the customer wishes, he/she can collect the order him/herself. If the customer instructs the company that the order should be delivered, the customer must be informed that it will be done at an extra charge, which will be added to the account. Documentation regarding orders will include: Dispatch orders, stock records, tally sheets, delivery records, quality and accounting records, load manifests and payment instructions.

## Use relevant communication equipment to convey and distribute orders

The communication equipment to be used in order to convey and distribute the orders will include telephone, email or fax. This will be an order from the sales person that the order has been approved and the stock should be conveyed and distributed to the customer. This is a very important step in the whole order process due to the fact that no mistakes regarding the stock to be distributed should be made. If this happens, the customer will be unsatisfied and might decide to cancel the order. This could also lead to stock losses. Although a telephone can also be used as communication equipment it is wiser to make use of email or fax in order to have proof that the correct order was given through to the stock department.

## Order deliveries aligned with customer delivery schedules and delivery times are booked and monitored

As soon as the order was given through to stock department, the sales person must contact the customer in order to decide on a delivery schedule and to book the delivery time. The order should not be delivered if the sales person is 100% sure that the customer is not at home or at the business where it should be delivered. When the order is been delivered and the customer is not present, the order should not be left with someone else. Only the customer should be allowed to accept the delivery and the customer should sign acceptance of the delivery. This will serve as proof that the order was delivered to the correct person. The contents of the order should be checked by the customer while the delivery people are still there. This will ensure that there will be not queries regarding over- or under deliverance of stock. The order should also be checked for damages in the presence of the delivery people. The customer must sigh that everything regarding the order is in place, that the correct amount/s of stock are delivered, and that nothing is damaged. It is better to deliver the stock during working hours, but if that is not possible, the business should organise that the stock is delivered after hours or early in the morning. The business can charge the customer for this due to the fact that the business will have to pay the delivery people overtime.

## Identify variances in the orders and take corrective action

### Damaged goods

When the stock is delivered it should be checked by the customer while the delivery people are still present. If the customer is in a hurry and can not check the contents of the delivery, the delivery note should be marked “unchecked”, but this should be avoided at all costs. If boxes of stock look as it are damaged, the customer has two options:

* 1. Refuse the delivery
	2. Accept the delivery, but make the delivery people aware of it and sign for the goods clearly writing “damaged” on the delivery note

In both situations the sales person should be called immediately and the problem should be reported. Telephone calls should be backed up with a written confirmation. If the customer organised the delivery directly with the business, the responsibility remains the customer’s to prove that it was the business which caused the damage and not the customer. In this case it is really important that the customer acknowledge any damage immediately, directly to the delivery person and then to the business. If the business arranged the delivery, the delivery person should be made aware that the business is responsible for dealing with the problem and have a contractual responsibility to supply the customer with stock which is of satisfactory quality.

### Quantity discrepancies

It is difficult if a customer is taking delivery of for example 1000 bricks to ensure that the customer indeed receives 1000 bricks. On occasions like this the delivery person will not usually wait whilst the customer actually counts the items. If the customer signs the delivery note “unchecked”, he/she will have the opportunity to claim if the incorrect quantity has been delivered. The law allows purchasers “A reasonable amount of time” to check deliveries and report faults. It is therefore important that deliveries are fully checked as soon as it is possible. Any discrepancies, not matter how minor, should be reported immediately to the business. If the customer received more than he/she ordered, the business must be notified and the business must collect the extra items. The business can offer the customer to keep the extra items, especially if it is of low value. The business can also offer to sell the extra items to the customer, often with the promise of a deferred invoice. The customer is however under no obligation to accept this offer.

If the customer receives less than the amount ordered:

* The balance will only be cancelled if the customer inform the business immediately that the remaining quantity is of no use to the customer due to the delay
* The customer can ask the business to deliver at the customer’s convenience
* The customer may reject the part order and cancel the balance informing the business that the delivery is in breach of contract as the full quantity is required

### Incorrect goods

If the goods match the customer’s purchase order and the customer has just simply bought the wrong item/s or ordered the incorrect quantity, it will be down to the business whether the business is willing to assist the customer with an exchange or not. The business has no legal requirement to accept back goods which was incorrectly ordered. However, the business may be willing to do this if the customer accepts a restocking fee. In situations like this each case is individual and if the customer is unsure, he/she must contact the business.

If the goods do not match the purchase order:

* The customer may reject the delivery and cancel all future deliveries
* The customer may reject the delivery and request a re-delivery within a reasonable amount of time
* The customer may accept the goods

# ENSURE SALES TEAM FOLLOW-UP ON ORDERS PLACED

#### Specific Outcome 5

Ensure sales team follow-up on orders placed.

#### Assessment criteria

1. Good customer relations are monitored through awareness of order status.

2. Order documentation is checked to confirm whether reconciled and processed in accordance with organisational requirements.

3. Order administration procedures and systems are monitored to ensure adherence with company policies.

4. Variances in orders placed and orders received by the sales team are managed.

5. Damaged goods uplifted inline are checked against organisation requirements.

## Monitor good customer relations

Monitoring staff's correspondence with customers is vital to the success of the customer service department. Weekly postmortems provide the opportunity for the staff to discuss challenges and strategies for dealing with problematic situations. Finally, asking for feedback from customers -- either on a specific call or in general -- is perhaps the best way to assess the performance of staff.

### Regulate customer service attitudes

Watch out for the introduction of attitudes among customer service reps that paint the customer in a negative light. What starts out as seemingly harmless talk about customers can wind up becoming a company culture that pits reps against customers and ultimately causes customers to leave.

### Monitor staff's quantitative performance

Here are some metrics to use to evaluate each representative. If a business have only one rep, the business can use these metrics to establish a baseline for future customer service employees.

#### Situations handled per time period

This metric gives a relative base for comparing two or more customer service representatives. Here's how to calculate it: For any given day, week, or month, count how many individual situations each representative handled.

#### Percentage of situations resolved to the company's benefit

This metric will help determine the effectiveness of each customer service representative. To calculate it, total up the number of situations handled by the rep. Then make judgments about the success of the outcome. Divide the number of successful resolutions by the total number of situations and multiply by 100 to get a percentage.

#### Time per situation

Use this metric to determine if a rep spends his or her time wisely. It can also be used to determine whether a rep is more effective in one medium versus another. Here's how to calculate it: Divide the number of situations handled by the number of hours worked. Then break these down by media -- e-mail, phone, and letter. This will give an estimate of the time it takes each customer service rep to resolve a situation. Remember, the time it takes to resolve an issue via e-mail will differ greatly from the time it takes to resolve the same issue via phone.

#### Rand value per situation

This metric requires more active bookkeeping, but it can help determine the cost-effectiveness of customer service staff. It can also be use it to develop guidelines about how much time a representative should take to resolve situations related to low-cost products. To calculate it, add up the rand value of the products in dispute in each situation. Divide that number by the total number of situations.

#### Response time

This metric, which allows measuring how quickly a customer service representative answers a customer inquiry, requires collecting a significant amount of data; it has to be decided if it's worth your while to do so. To calculate it track the times of incoming calls and e-mail messages and match them up with outgoing call logs and e-mail time stamps. Once the messages were paired, find the response time for each correspondence by subtracting the outgoing message's time from the incoming message's time. Finally, average the response times by medium -- e-mail, phone, and letter.

### Monitor staff’s qualitative performance

Quality, like beauty, is in the eye of the beholder. Here are three ways to determine the quality of service representatives' customer relations:

#### Review e-mail for consistency and core values

Gather all the e-mail and written correspondence from customer service representative(s). Review it for the obvious: grammar, misspellings, effectiveness of presentation, and politeness. Also scan it for common words and decide if those are truly the ones that should be chosen to describe the company.

#### Monitor customer service calls

Listen in unobtrusively on customer service calls. Pay attention to the tone and manner representative uses to discuss the situation with the customer.

#### Call customers for satisfaction reports

Check up on each representative by contacting a random sample of customers who have been served by him or her. Ask them about their satisfaction with the company and with the service they received.

## Check order documentation to confirm whether it was reconciled and processed

It is extremely important to follow-up on orders placed in order to ensure that it was delivered on time to the customer. While checking the order documentation it is also important to observe if the order was reconciled and processed.

Reconciliation is an accounting process used to compare two sets of records to ensure the figures are in agreement and are accurate. Reconciliation is the key process used to determine whether the money leaving an account matches the amount spent, ensuring that the two values are balanced at the end of the recording period.

A very important aspect is to verify that the order was processed in the agreed timeframe.

## Monitor order administration procedures and systems

Order administration should adhere with company policies. The following steps should be followed regarding orders:

* Proof must be obtained whether the order was placed by telephone, in person, by email, or by whichever method
* The order documentation must be completed in full
* Confirmation of the order which was placed to the suppliers or stockroom must be obtained (for example a fax report, email printout, etc.)
* Confirmation that the products/services which were ordered were put together as per the customer’s order
* Confirmation that the products/services were delivered or collected by the customer, by when and by what time
* Confirmation by means of the customer’s signature and the delivery person’s signature that orders were received in good condition

All of the above must be monitored and thoroughly checked. This will ensure that there will be no future complaints by customers due to the fact that the business has proof that everything regarding orders are according to administrative procedures and systems.

## Manage variances in orders placed and orders received

If the order documentation is checked and variances are identified, those variances should be dealt with immediately. If the variance is something like a short delivery which the customer noted on the delivery note but there is no proof that anything was done about it, the customer should be contacted immediately in order to enquire if the problem was solved or not. If the short delivery was not rectified, it should be done immediately and the business should sincerely apologise to the customer and even offer the customer a discount or other form of compensation. This will ensure that the customer will not be lost to the business and still remain a loyal customer.

If the case occurred where an order was delivered late, there is unfortunately nothing a business can do about it afterwards, but the business can contact the customer and sincerely apologise. The customer can be sent a gift certificate in order to ensure that the customer remains a loyal customer to the business.

If there are regular variances in orders which were placed and received, the employees who dealt with those specific orders should be given adequate training, and if training is not the problem, the employees should be disciplined.

Variances in orders can lead to a business loosing a lot of money. If there was an over delivery in an order (customer received more than he/she ordered) it means that the business has a stock loss. In the case of an under delivery in an order (customer received less that he/she ordered) it means that the customer could prefer not to do deal with the business anymore and take his/her business to the next competitor. This leads to less turnover for a business.

Variances in orders should be dealt with immediately and if the problem occurs, disciplinary action should be taken against the appropriate employees.

## Check damaged goods uplifted inline against organisational requirements

When a customer placed an order and the goods/services received were damaged, the customer will return it and either ask for a replacement or a refund. Either way the business looses. Damaged goods uplifted are the damage goods which were returned to the business. There should be evidence that the damaged goods are stored on the premises of the business.

When damages to goods are the fault of the supplier, it needs to be returned to the supplier within the allowed time. The supplier should grant the business either a refund or a replacement. Remember that the business is a customer of the supplier just like the customer is of the business.

Very important to remember is to have evidence that goods were delivered to customers in a good working condition. It happens that customers use a product for a while and then return it due to poor working conditions. Customer abuse can occur and if there are any doubts the product should be send to quality department in order to validate if the damage/s was due to poor production or customer abuse. In the case of customer abuse the business needs to proof it and can deny the return or refund of the product.

# MANAGE OVERALL CUSTOMER SATISFACTION LEVELS AND RELATIONSHIPS

#### Specific Outcome 6

Manage overall customer satisfaction levels and relationships.

#### Assessment criteria

1. Processes that establish communication with customers in accordance with company requirements are monitored.

2. Product and service support provided that is consistent with identified customer needs and the resources of the organisation are monitored.

3. Opportunities for feedback from all stakeholders are monitored in relation to maintaining and improving customer satisfaction and relationships.

4. Methods and techniques that provide for the ongoing identification of customer satisfaction are checked in accordance with established requirements.

## Processes that establish communication with customers

With more and more business being done over the telephone and the increasing use of 24 hour professional call centres to handle customer enquiries, knowing how to communicate effectively both face to face and on the telephone is vitally important. To help you get your message across clearly, politely and efficiently recruitment experts highlight some common problems and provides some techniques to put them right. This fact sheet brings you essential know-how on the different ways you can polish up your communication.

### Customer clout

We live in an era where the customer is king. Gone are the days when customers were thought of as an interruption or that answering their queries were doing them a favour. Nowadays good customer service provides an organisation with its competitive edge and customers expect to be dealt with professionally and competently. Whether you are involved with customers on the telephone or deal with them direct, the following common sense guidelines will help you to make the right impression and give your customers what they are looking for.

#### Image wreckers

If you answer the telephone or if you greet visitors you need to beware of ruining professional images with comments that often give the wrong impression such as:

* They are still at lunch (they're taking a long break)
* They are not in yet (they're late)
* They have left already (they've slipped off early)
* She's at the dentist (this is too personal)
* He's just popped out (and does so all the time)
* I don't know where he is (internal communication is bad)
* They are tied up (they are too busy to talk to you)

It is far easier and much more professional to say: She's not available at the moment - may I get her to call you back etc.

#### Top six telephone frustrations

* Being cut off or put through to the wrong person
* Being left hanging on with no explanation
* Not knowing who you are talking to and if they can help
* Being asked lots of questions
* Not being given the chance to explain yourself
* Being called at an inconvenient time

#### Service standards

Think about what is meant by good service. It involves many different qualities and will depend on the circumstances involved but whatever business you are in, there are a number of basic good practices which should be taken on board.

#### Be courteous

* Identify yourself and listen without interrupting
* Respond as necessary
* Stop talking if interrupted
* Give prompt service with the minimum of delay
* Don't keep the caller hanging on the line without going back to them

#### Be friendly and helpful

* Speak clearly and with a smile (yes, you can "hear" a smile!)
* Be aware of how important your voice is in conveying a friendly personality
* Be enthusiastic and show an interest
* Be sincere in your attempts to help
* Never lose your cool
* If you promise to take certain action do it as agreed
* Deal with any problems diplomatically

#### Learn to listen

Improving your listening skills can make a huge difference to your communication success - people need to know that you fully understand their case.

* Don't interrupt unnecessarily
* Don't switch off half way through
* Don't hurry people
* Try putting yourself in the caller's place

#### Information

When you are recording or giving information remember that it must be precise and detailed.

* Be clear and accurate
* Make sure that any information you give is correct
* Avoid jargon
* Talk with confidence
* Get the facts and record the information
* Confirm your caller understands the information you have supplied
* Answer questions if you can or offer to find out the information

#### Message taking

It is vital to collect all the relevant information when you are taking messages for other people. The following checklist will help you to make sure you haven't forgotten anything.

* Who the call is for
* The date and time of the call
* Name of caller and company
* Their telephone/fax number
* Reason for the call / is the call urgent?
* A convenient time to return the call
* Your name
* Details of anything you have agreed with the caller

#### Handling problems and complaints

When you are handling difficult situations it is important to keep calm and not let your emotions get the better of you. In many ways a complaint is an opportunity - the chance to show you can put things right. A customer whose complaint is successfully resolved will have a strong sense of loyalty.

* Try and establish some rapport with the caller
* Use their name and recognise their importance
* Let the person explain and listen carefully
* Get all the facts and take notes
* Direct the conversation away from emotion
* Avoid defensive reactions
* Try and develop a solution giving a time frame and your actions
* Make a commitment to follow up
* Get agreement to your solution
* Thank the person for calling

#### Be positive

If you are in the front line of communication then it is vital that you have a positive attitude because it is clearly reflected in both your voice and in the way you behave with others. Not only will a positive approach make you feel good it will also get a positive response from others.

A well known business guru was recently asked what the three most important factors were for a business to be successful. His reply was 'Communication, Communication and Communication.'

## Provide product and service support

Product and service support provided that is consistent with identified customer needs and the resources of the organisation are monitored.

Service Product Management deals with managing a service product across its complete life cycle. This organisational function is equally common between [Business-to-business](http://en.wikipedia.org/wiki/Business-to-business) as well as [Business-to-consumer](http://en.wikipedia.org/wiki/Business-to-consumer) businesses. A service product, unlike a hardware or software product, is intangible and manifests itself as pure professional services or as a combination of services with necessary software and/or hardware. The service product management practice ensures management of a profitable service in the marketplace. Service Product manager identifies profitable service space, packages services in a productised form and delivers the same to the market. The function is a core service business management function and is a mix of sales and marketing functions. The function interfaces with various organisational groups like Strategy, Planning, Financial Controls /Management Accounting, Sales, Marketing Communications etc.

### Important functions of a Service Product Manager

#### Service idea generation/management

The function deals with capturing market's unmet and/or under-served needs, filtering the ideas based on business viability, business feasibility and potential, scalability, company strategy, and capital rate of return considerations. The end result is a potential set of market feasibility and market features captured in a marketing requirement document.

#### Service sales support

Service product management supports service sales by providing accurate resource estimate and in the right mix to provide an efficient product cost base on which to baseline the customer pricing.

#### Demand supply planning

Services profitability management by supporting balance between service demand and supply of necessary service resources.

#### Business management system support

Efficient management of service product cost and revenues according to service contract and incurred costs. The same is generally needs a service product manager to provide product data management for [Enterprise resource planning](http://en.wikipedia.org/wiki/Enterprise_resource_planning) systems.

#### Marketing and market communications

Industry event participation, press release, consensus building, delivering service messaging through various available marketing channels.

#### Knowledge management

Manage the [knowledge management](http://en.wikipedia.org/wiki/Knowledge_management) process and best practices for the service.

#### Service ramp down

Manage the decision process of ramping down service product, and executing the service ramp down thus ending the service [product management](http://en.wikipedia.org/wiki/Product_management) process.

## Monitor opportunity for feedback from all stakeholders

It is vitally important for any business to create and ensure opportunities for feedback from all stakeholders in relation to maintaining and improving customer satisfaction and customer relationships.

A shared concern to improve service to customers is at the heart of the relationship has with stakeholders – organisations that represent the interests of individual customers.

The aim is to:

* Keep stakeholders up to date with developments through the most appropriate means, including regular face to face meetings
* Ensure stakeholders receive a clear and accurate response to issues and questions raised, in a reasonable timeframe and to their satisfaction
* Work with stakeholders in a focused way to tackle the most important issues.

### Third sector organisations (voluntary and community sector)

It is important to recognise the importance of partnership working with the third sector (voluntary and community organisations, charities, social enterprises, cooperatives and mutual both large and small) in assisting joint customers to move from welfare to work.

Organisations that make up the third sector often already have the trust of many of our customers, including those currently not actively engaged.

It is therefore important to support the thriving third sector, enabling them to campaign for change, deliver public services, strengthen communities and develop relationships to make them effective stakeholders.

### Keeping in touch

It is important to ensure that stakeholders are kept up to date with regular updates about progress on modernisation, performance, changes to benefit rules, etc.

### Liaison with stakeholders

Managers are responsible for the delivery of services and for ensuring good service for individual customers.

It is the manager’s jobs to establish and maintain good working relations with local stakeholders including customer representative groups.

All businesses should have liaison and communication arrangements with key local stakeholders. This helps ensure issues can be raised with the appropriate people in the business and resolved as quickly as possible.

## Methods and techniques that provide for the ongoing identification of customer satisfaction

### 8 rules for good customer service

Good customer service is a business's best competitive advantage.

Good [customer service](http://sbinfocanada.about.com/cs/marketing/g/custserv.htm) is the lifeblood of any business. You can offer promotions and slash prices to bring in as many new customers as you want, but unless you can get some of those customers to come back, your business won't be profitable for long.

Good customer service is all about bringing customers back. And about sending them away happy - happy enough to pass positive feedback about your business along to others, who may then try the product or service you offer for themselves and in their turn become repeat customers.

If you're a good salesperson, you can sell anything to anyone once. But it will be your approach to customer service that determines whether or not you’ll ever be able to sell that person anything else. The essence of good customer service is forming a relationship with customers – a relationship that that individual customer feels that he would like to pursue.

How do you go about forming such a relationship? By remembering the one true secret of good customer service and acting accordingly; "You will be judged by what you do, not what you say."

This verges on the kind of statement that's often seen on a sampler, but providing good customer service IS a simple thing. If you truly want to have good customer service, all you have to do is ensure that your business consistently does these things:

#### 1) Answer your phone

Get call forwarding. Or an answering service. [Hire staff](http://sbinfocanada.about.com/od/humanresources/a/hiringemployees.htm) if you need to. But make sure that someone is picking up the phone when someone calls your business. (Notice "someone". People who call want to talk to a live person, not a fake "recorded robot".)

#### 2) Don't make promises unless you will keep them

Not plan to keep them. Will keep them. Reliability is one of the keys to any good relationship, and good customer service is no exception. If you say, “Your new bedroom furniture will be delivered on Tuesday”, make sure it is delivered on Tuesday. Otherwise, don't say it. The same rule applies to client appointments, deadlines, etc. Think before you give any promise - because nothing annoys customers more than a broken one.

#### 3) Listen to your customers

Is there anything more exasperating than telling someone what you want or what your problem is and then discovering that that person hasn't been paying attention and needs to have it explained again? Can the sales pitches and the product babble? Let your customer talk and show him that you are listening by making the appropriate responses, such as suggesting how to solve the problem.

#### 4) Deal with complaints

No one likes hearing complaints, and many of us have developed a reflex shrug, saying, "You can't please all the people all the time". Maybe not, but if you [give the complaint your attention](http://sbinfocanada.about.com/od/customerservice/a/custservicekr.htm), you may be able to please this one person this one time - and position your business to reap the benefits of good customer service.

#### 5) Be helpful - even if there's no immediate profit in it

A great example of good customer service was told by this customer which is great proof that a business should sometimes be helpful even if there is no immediate profit in it for the business:

“The other day I popped into a local watch shop because I had lost the small piece that clips the pieces of my watch band together. When I explained the problem, the proprietor said that he thought he might have one lying around. He found it, attached it to my watch band – and charged me nothing! Where do you think I'll go when I need a new watch band or even a new watch? And how many people do you think I've told this story to?”

#### 6) Train your staff (if you have any) to be always helpful, courteous, and knowledgeable

Do it yourself or hire someone to train them. Talk to them about good customer service and what it is (and isn't) regularly. Most importantly, give every member of your staff enough information and power to make those small customer-pleasing decisions, so he never has to say, "I don't know, but so-and-so will be back at..."

#### 7) Take the extra step

For instance, if someone walks into your store and asks you to help them find something, don't just say, "It's in Aisle 3". Lead the customer to the item. Better yet, wait and see if he has questions about it, or further needs. Whatever the extra step may be, if you want to provide good customer service, take it. They may not say so to you, but people notice when people make an extra effort and will tell other people.

#### 8) Throw in something extra

Whether it's a coupon for a future discount, additional information on how to use the product, or a genuine smile, people love to get more than they thought they were getting. And don’t think that a gesture has to be large to be effective. The local art framer that we use attaches a package of picture hangers to every picture he frames. A small thing, but so appreciated.

If you apply these eight simple rules consistently, your business will become known for its good customer service. And the best part? The irony of good customer service is that over time it will bring in more new customers than promotions and price slashing ever did!