

A Useful Guide to Customer Service



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ISBN 978-1-906460-24-2

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 **Pansophix**

A Useful Guide to Customer Service

Published by Pansophix Online
22 Torquay Road, Chelmsford,
Essex, CM1 6NF, England

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This edition published March 2010 (a)

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ISBN 978-1-906460-24-2

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INTRODUCTION

Welcome to the Useful Guide

"A satisfied customer – we should have him stuffed!"

BASIL FAWLTY

Fawlty Towers may be long gone from U.K. television screens however people relate the indifference to customer service they receive at times to the iconic comedy of the 1970s.



The Henley Centre for Customer Management brings service ethos up to date when they assert ...

"The thing that gives you the competitive edge is the history and relationships you have with your customers."

PROFESSOR MOIRA CLARK

We all receive service every day of the week as customers ourselves in a restaurant, shop or on the end of the telephone to a contact centre. However we all **give** customer service in our jobs and private activities. We are all 'service providers' in the way we perform our job and help colleagues, managers and other departments.

This Useful Guide helps customer service providers understand the importance of their role and develops essential skills required to deliver superior customer service i.e. service that doesn't just satisfy, it delights! - creating warm feelings in recipient's minds that builds **relationships**.

We hope you find this Useful Guide useful and an invaluable source of reference. Good luck in delivering your customer service skills!

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Who the Useful Guide is for



This Useful Guide has been designed as a practical resource to help you understand customer service and develop service skills that will ensure that you perform to high standards no matter what your background or type of job. People who use this Useful Guide are from a wide variety of backgrounds including ...

- Offices
- Shops
- Contact centres or customer service departments
- Warehouses
- Factories
- Those looking for work or thinking of moving into a customer services job
- Veterinary practices
- Staff and managers
- I.T. departments
- Commercial organisations
- Councils and health authorities
- Charities

In short **everyone** has something to gain from this Useful Guide.

Using the Useful Guide



This Useful Guide has an open learning format. In simple terms that means it's up to you when and where you study and for how long at a time. Everything that you need to know is contained in the guide. We are well aware that everyone learns at a different pace and in different ways. *So you choose the place, you choose the pace.*

We recommend that you use the Useful Guide in conjunction with someone else, a 'mentor' or your manager. They will be invaluable in supporting you as you work through the Useful Guide. Discuss the objectives outlined on the next page. They may be able to suggest more specific learning needs to add to these objectives. You may also want to agree dates with your manager/ mentor, both during and after completion of the Useful Guide, to review your progress and ...

- Discuss any issues arising.
- Keep your motivation level high.
- Help think through some of the issues raised in the Useful Guide from another perspective.
- Provide you with support, tips and ideas.
- Provide a measure of how well the learning objectives have been satisfied.
- Review any further learning objectives which come to light.

As you work through the Useful Guide, congratulate yourself on your strengths but also look for development areas – things you could **start**, **stop** or **continue** doing. There are frequent Skill Review pages built into the Useful Guide together with a template (Personal Pledges Form) at the back to help you capture any final development areas.

"You gotta keep the customer satisfied."

SIMON & GARFUNKEL

Useful Guide objectives

By the end of the Useful Guide, you will ...

- Know the role of the effective service provider.
- Appreciate the principles of customer service.
- Be aware of own first impressions made on people.
- Define the true meaning of 'communication'.
- Understand the reasons why communication is misinterpreted between people in organisations.
- Understand the key behaviours for superior performance.
- Know best practice tips on emailing.
- Be more skilled at using the telephone.
- Understand the 4 P's of voice.
- Understand the behaviours associated with active listening.
- Improve your listening skills.
- Understand the meaning of the word 'assertive'.
- Be assertive with others, including saying no effectively, disagreeing positively and dealing with difficult people.
- Handle irate people with confidence.



If you prefer to type your responses to the exercises you can download load an MS word version of all the exercises and questionnaires [here](#).

I think that, for all of us, as we grow older, we must discipline ourselves to continue expanding, broadening, learning, keeping our minds active and open."

CLINT EASTWOOD

Your notes (when printed)

"Your most unhappy customers are your greatest source of learning."

BILL GATES

Your notes (when printed)

"If people knew how hard I worked to get my mastery, it wouldn't seem so wonderful after all."

MICHELANGELO

Your notes (when printed)

*"If I had asked the customer what they wanted, they would have said
a faster horse."*

HENRY FORD

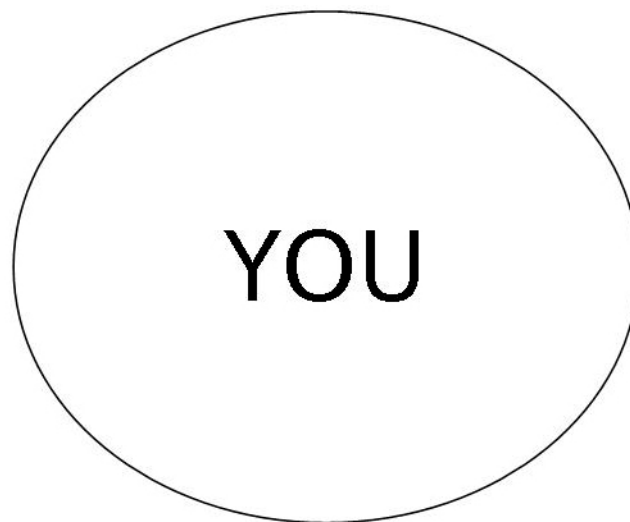
YOU AND CUSTOMER SERVICE

Who are your customers?

It might be useful to start with defining who your customer is. This may seem pretty obvious however devote some thought to this and complete the short exercise below.

Activity

Around the diagram below, write in the names of who (or what) you regard as your customers. Then turn over for some feedback.



"Great customer service is not rocket science. It is often just doing the simple things excellently."

CUSTOMER FOCUS MAGAZINE

Who are your customers?



The most obvious customer (and many say **THE** most important) is the 'end user'. In commercial organisations, the person (or company) who ultimately pays for the product or service your company provides. In other words: 'the person who pays your wages'.

In some organisations such as stores, restaurants and contact centres, they are called 'customers'. For others, such as in professional services like accountants and solicitors, the word *customer* is replaced by *client*.

The same is true in the public and charity sectors, where increasingly the 'end user' is called the client. Good examples are in: care homes for the elderly; the National Health Service and social care such as the Benefits Office.

Over the last few decades, another type of 'customer' has evolved – the concept of the **internal customer**. Examples of internal customers you may have written on your list include ...

- Colleagues/ peers
- Other departments
- Suppliers
- Lead standard bodies
- My manager
- Directors of the organisation
- Contractors

The key point is that for exceptional service there should be little difference between service levels given to internal customers and to the 'end user' – the same **quality** and **speed** of service. The only difference is that money doesn't change hands with internal customers (imagine completing a task for the boss and asking him or her for £10 remuneration for giving your time and energy!).

Your role in the organisation

The service providers' role is a challenging one. They undertake a multitude of tasks to keep the 'wheels of the organisation running smoothly'. People say that the job is getting harder, as customer's expectations look for ever-increasing work standards to much quicker deadlines.

"Providing good customer service is like being an Actor. You are only as good as your last performance."

DAVID EVANS (The Grass Roots Group)

On the other hand, service providers say that their job is more challenging because organisations are operating with less staff than 20 years ago so there are far too many things to do with too few people to do it. This creates significant challenge for the superior service provider to deliver high standards of work in difficult environments.

When we are not under pressure, giving really good customer service can be relatively easy (although there appear to be too many organisations around that don't display even the most basic customer service skills). However, the time we do need high quality service skills is when faced with difficult situations – saying no to a customer, disagreeing with them or perhaps calming them down when irate or upset.



Your role in the organisation



"We need to keep the customer at the centre of everything we do."

CHARLES DUNSTONE – CAR PHONE WAREHOUSE

Your role in the organisation

Service Provider

- Aiming to **delight** (not just satisfy) clients and internal customers.
- Going that extra mile.
- 'Under-promising and over-delivering' e.g. promising to email something over to the customer by 5pm but they get it by 3pm.

We will develop this theme of superior service throughout the Useful Guide.

Ambassador

- Representing the brand of the organisation.
- You are the face and voice of your employer.
- First impressions and last impressions count – people remember these the most.

Team Worker

- Helping others out when they are under pressure.
- Having a sense of humour – a tonic to work with.
- Looking out for team members (e.g. warn them of any problems that you've spotted in what they are working on) and keeping them informed, particularly if colleagues are part time or out of the immediate work area for long periods. (E.g. visiting clients or working from home)

Liaison Officer

Ensuring the cogs of the wheel are oiled. For example ...

- Liaising with internal customers, keeping them informed.
- Briefing your boss with updates on progress of tasks and any issues that have arisen.
- Updating customers and clients with progress on projects, and managing their expectations in terms of service delivery.

Information Giver

- We are seen as the 'fountain of all knowledge'.
- Having a thirst for company information, procedures and knowing 'who does what'.

"The surest way of gaining success is believe you can succeed."

ANON

Your role in the organisation

Sales Person

- In commercial organisations: from issuing sales catalogues to suggesting additional services/products/special offers to customers when appropriate.
- For public and charity sectors, it's about telling customers about the services our department (or we ourselves) provide.
- As mentioned earlier, we sell our brand as ambassadors.

Problem Solver

- Ensuring that the best possible solutions are found to give people 'what they want when they want it'.
- Recommending solutions to the customer which are also cost effective to your department – looking for 'win-win' situations.
- Reviewing your problem solving approaches and solutions to ensure that you are recognising the successes and learning from things that go wrong.

"It is the customer who pays the wages."

HENRY FORD

Activity (in your toolkit)

Discuss the last 3 pages with your manager or a mentor who can offer you some advice. Use the following trigger questions ...

- How well do you fulfil these areas of your role?
- What challenges do they present in achieving these areas?
- How can you overcome these challenges?
- What could you do to achieve even higher standards in the future?



Use the space below to record any comments or learning points.

Service Provider

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Ambassador

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Team Worker

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Liaison Officer

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Information Giver

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Sales Person

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Problem Solver

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Customer service



It can be useful to spend some time getting into 'the shoes of' the customers and clients you help in your role ...

- What does our level of service look like from their perspective?
- What do they think?
- How do they feel about it if they were being really honest?
- What are their expectations from us?
- What are they measuring our service against?

To facilitate this, it might be useful to work through the following exercise.

Customer service exercise

Think about examples of customer service **you yourself** have experienced in the past. For example, as a customer ...

- in a supermarket, pub or restaurant.
- on the phone to a Contact Centre.



Think of the superb examples - you were significantly impressed by the service (you said to yourself: *"That's really good – you wouldn't get that anywhere else"*) and the really bad examples – where you were unhappy and disenchanted by what you received.

Capture your thoughts on the following pages.

"You can make more friends in two months by becoming interested in other people than you can in two years by trying to get people interested in you."

DALE CARNEGIE

Superb customer care/service ([in your toolkit](#))

For Read Out loud Readers: The following table has 1 column and 4 rows

What exactly happened? What was said? What did they do?
Why was it such a great example – what were the 'wow' factors?
How did you feel at the time? How many people did you tell? How do you feel NOW about the experience?

For Read Out loud Readers: The table has 1 column

"The mind is like a parachute – it works best when it's open."

ANON

Bad customer care/service ([in your toolkit](#))

For Read Out loud Readers: The following table has 1 column and 4 rows.

What exactly happened? What was said? What did they do?
Why was it such a poor example?
How did you feel at the time? How many people did you tell? How do you feel NOW about the experience?

For Read Out loud Readers: The table has 1 column.

"Don't assume your customer is as happy as you are. Monitor customer reaction on an on-going basis."

JACK WELCH

Review of customer service exercise

Some of the things you may have found...

- Other people doing this exercise feedback that they can think of lots of poor service experiences, but the really excellent ones are more difficult to recall. Perhaps they haven't experienced many. Interestingly, customer service tends to get described as 'satisfactory' to 'good' in the U.K., but rarely exceptional.



- When you do receive excellent service, you tend to remember it most, even if it happened a long time ago. This is because it hits your feelings. You experience warm, positive feelings about the experience. When feelings attach themselves to experiences, they tend to stay in your memory longer, just like all the highs and lows in your life to date. You remember the very positive experiences (e.g. birth of a son or daughter; passing your driving test) as well as the negative ones (e.g. being made redundant; a bereavement), and you tend to remember them in a lot of detail.
- So the 'wow' factor of service is about delighting people rather than satisfying. This means leaving them with a warm feeling about the service. As we will explain later, this doesn't necessarily require time or money – a lot of it is about our personal attitude and approach to work.
- By re-framing our position from service provider to service recipient it can help us understand more about the customer, their position and their expectations for us. The best service providers are ones who are much more aware of the impact of their behaviour on others. The starting point has to be about 'in their shoes'.

"Being served by a glum functionary who lacks initiative or personality is still a frequent experience for many of us."

PROFESSOR MOIRA CLARK – HENLEY CENTRE FOR CUSTOMER MANAGEMENT

Case study

A private fertility company moved premises from an integrated unit in a large hospital (with all the support services to hand) to a stand-alone business unit 5 miles away. Clients came to them directly as private patients or were referred by the local health authority.

The company undertook a major exercise with the staff to track the 'customer journey' from initial contact, through consultation and treatment to payment of fees. This entailed dissecting all aspects of their customer contact, from the opening salutation on the telephone to the quality of the handover from reception area to consultant's room; from quality of signing of the building from the main road to how they kept the client informed about their treatment.

The process brought up many issues, mostly minor but could be seen as a hindrance in the customer's eyes, particularly as they add up into a bigger picture. Action plans were set and implemented at every stage of the customer's journey to promote the highest standards. It really focused the eyes and ears of the staff to see their work environment in a much more customer focused way.

- The way we feel when we receive good service is exactly how our customers feel when receiving good service.
- The way we feel on receiving poor service is exactly the way our customers feel when receiving poor service from us.



Skill review: customer journey

([in your toolkit](#))

Having reviewed the case study on the previous page, trace the customer journey for your external and internal customers in your department/organisation ...



- What's good about it?
- What could be improved?
- What is required to improve the experience?
- What gets in the way?
- How can you reduce or eliminate these blockages?

Share your findings with your manager.

Your Notes

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"You don't have to be sick to get better."

ANON

Bet you didn't know that..... exercise

Complete the gaps by inserting the correct number. This data represents general customer service research across a wide cross-section of industries?



1. It costs ____ times as much to attract a **new** customer as it does to keep an **established** one.

2. Xerox the photocopier company measured its customer satisfaction regularly. They felt very pleased that 90% of their customers said they were satisfied with the service they were receiving. Yet Xerox's market share was dropping. They discovered that it was not enough to merely satisfy customers, delighted customers were ____ **times more likely** to stay with them. (**Xerox**)

3. If a customer is dissatisfied with the level of service from us, up to ____ other people, on average, will find out about it. Other consequences include loss of reputation for the brands, lower sales, poor staff morale and staff leave.

4. Why customers quit ...
 - ____ % quit due to an attitude of indifference towards the customer by the staff.
 - ____ % are dissatisfied with the product.
 - ____ % leave because of price.

(How to win customers and keep them for life – Michael Leboeuf)

5. ____ % of complaining customers will do business with you again if you resolve the complaint **in their favour**.

6. ____ % of complaining customers will do business with you again if you resolve the complaint **instantly**.

By the way, for every customer who bothers to complain, 26 other customers remain silent.

Now see the next page for the answers.....

Bet you didn't know that..... exercise

The answers ...

	Answer	Comment
1.	5 times	<i>It's easier to look after the existing customers</i>
2.	3 times more likely	<i>Hitting people's feelings makes sense</i>
3.	Up to 16 other people	<i>People pass on bad news very quickly. Also why should someone with high standards tolerate poor standards of others around them?</i>
4.	68% quit because of attitude of indifference 14% dissatisfied with the product 9% because of price	<i>People will tolerate price and quality a lot more than service issues</i>
5.	70% of complaining customers if resolved in their favour	
6.	95% if you resolve the complaint instantly	<i>And not necessarily in their favour – it's about the professionalism and speed of 'turning around' the problem.</i>

Case study

Consider this tale of an investigation carried out in a public library ...

A number of people who visited a public library were photographed with a hidden camera as they had their books checked out by the staff.

The people who issued the books were asked to pay as little attention as possible to the borrower. They were asked to try to be completely neutral; no smile, no eye contact, no greeting and no physical contact at all.

At the exit the borrowers were interviewed about their impression of the library. They were all agreed, the service was bad. This was the expected result.

What was a surprise to the researchers however was that very few borrowers mentioned the staff when complaining of the service. They felt that the poor impression was caused by the bad lighting, a difficult numbering system, etc. A few complained that they could never find the books they wanted and had to order them.

In the second part of the experiment the staff were asked to:

- look the borrower in the eye.
- mention the borrower's name (printed on the card).
- thank the borrower when handing over the books.

The borrowers were again photographed with the same hidden camera and interviewed as they left the library.

The reaction was quite different. Almost all were satisfied with the library's service.

Again, very few mentioned the human aspect of the service, and yet it was the only element that changed. Many felt the good impression they received was due to good lighting, convenient numbering and cataloguing, etc. Most people accepted that popular books were likely to be out and did not find it difficult to have to order them.

"You don't get a second chance to make a first impression."

ANON

Consequences of poor service

Possible consequences for an organisation, or department, delivering poor service include ...

- Loss of sales/ profit. If you are a commercial organisation selling a product or service, think about the amount of money your customer spends with you per transaction. Then multiply this figure per year and again multiply the answer by how long you will trade with that customer over a lifetime. This can add up to a sizeable amount if you were to lose the customer through poor service.
- Bad reputation and word of mouth advertising. Remember, people can tell up to (as many as) 16 other people about their experiences.
- High labour turnover.
- Poor team-working and morale as others 'let the side down' and staff take the attitude of "Why should I bother?"
- Complaints. At one point during the boom of computers, a well known computer manufacturer was receiving 120 written complaints and 250 telephone complaints per day. This company is no longer with us!
- Poorer standards and time wasting.

A customer getting a message across... a true story

Location: Computer shop

When: October 1992

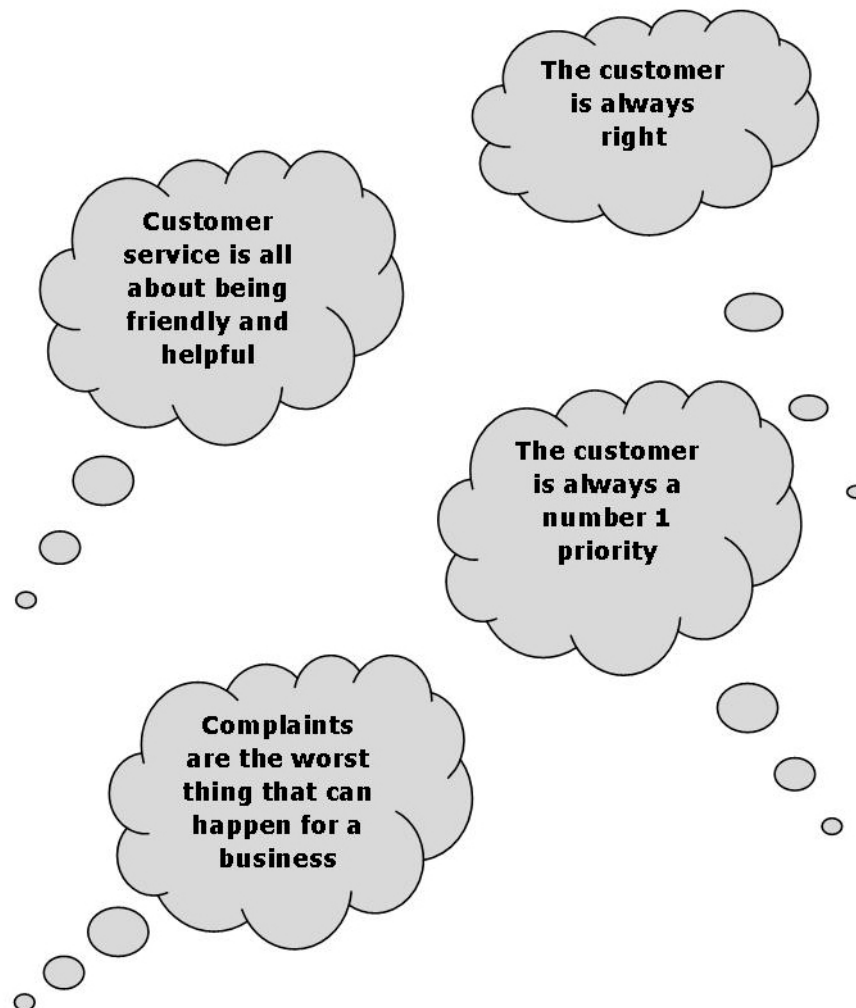
Where: London

In response to indifference from a sales assistant (including assistant wearily raising his eyes to the ceiling in response to a question), customer says to assistant:

"Look you seem to misunderstand the relationship here. I was about to spend over £1500 in your shop. This means that you should smile a bit, make agreeable noises when I ask questions – however stupid they may seem – and generally seek to please me. Because you prefer to pull faces for the benefit of the retarded losers on your side of the counter, I will take my business elsewhere"

Customer service statements: fact or fiction

Review these statements and write down your thoughts overleaf as to whether the statements are right or wrong, stating your reasons.



Your views on the customer service statements ([in your toolkit](#))

The customer is always right

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Customer service is all about being friendly and helpful

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The customer is always a number 1 priority

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Complaints are the worst thing that can happen for a business

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Our thoughts on the customer service statements

The customer is always right

- This statement is frequently displayed on organisation notice boards, quoted in customer service courses and posterised on department walls. Of course its principle is sound. We do want to give the customer 'what they want, when they want it', often going that extra mile for them. This is all part of delivering superior service.
- However in today's organisations delivering this each and every time is impossible – the customer can't get 'what they want, when they want it' all of the time. It might be physically impossible, or perhaps logistically or procedurally we cannot accommodate their needs.
- We also aim for a compromise – if we can't give them what they want, when they want it, then what can we give them? Is there a compromise situation? The reality is sometimes we can, but sometimes we cannot offer a concession – it has to be our way or decision that stands.
- With difficult messages, the way the message is delivered can be key to acceptance and maintaining our reputation in the customer's eyes. As one Chief Executive put it ...

"Sometimes good customer service is about convincing the customer they were less right than they thought they were"!

- Behind this statement are a number of positive approaches to service ...
 - **Empathising with the customer.** We may not be able to give them 'what they want when they want it', however we can feel for them in their disappointment. Your empathy has to be delivered sincerely. The worst thing is delivering an apology in a manner that gives the impression that we're reading from a script.
 - **Stating our position and justifying it.** This helps win customers over and shows that we're not just being bloody –minded. For example, how many times have you been told that you can't have what you want because "it's not company policy". This can be annoying because we feel that the service provider is hiding behind a policy.

Our thoughts on the customer service statements

- By selling our position to the customer it can help them see our point of view. For example, a customer wants something from us to an impossible timescale. Saying to the customer "I'd love to be able to deliver your repaired product by first thing tomorrow it's just that it is not possible in such a short timescale – we are waiting for a key component from the supplier and they promised us we'd have it by late tomorrow." is much better than saying "No, it's impossible to get you the repaired product by first thing tomorrow".
- **Looking for a workable compromise**, wherever possible. For example: "What I can do is make sure your product is the first to be fixed with the new component and it will be shipped to you within 48 hours".



Customer service is all about being friendly and helpful

- Being friendly and helpful is certainly a good disposition to have in all service jobs. However it may not be '*all about*' this. It can also be about the systems and processes that underpin our product/service delivery. As one Chief Executive of a leading multi-national telephone communication company put it ...

"The customer should be at the heart of everything we do"

- Are your systems and procedures designed with the customer in mind? Do they contribute to an efficient process that doesn't put barriers in your customer's way to get what they want, when they want it?

Our thoughts on the customer service statements

Case Study

One company's blockage to delivering fast service revolved around a single fax machine in the office receiving orders and other customer paperwork. Very often it became 'log jammed', delaying customer's orders or it would run out of paper and there would be a delay in the problem being spotted. This led to much customer frustration.

It took one service-minded individual in the department to do some investigation and use their initiative to solve the problem. They identified that there was a redundant telephone line in the office which just needed an activation call to the telephone company, and a quick chat with the boss (who was unaware of the fax issue) to buy a second, re-conditioned fax machine on e-bay. It transformed service levels (and reduced staff stress levels too!).

The customer is always a number 1 priority

- On the face of it, of course your customer is a number 1 priority. In reality though, when you have too much work to do and several customers are asking for something at the same time then something has to give. We have to prioritise and one customer has to end up being 'second best' (not that we will spell it out to them. Imagine saying to a customer: "I'll get around to you when I've finished dealing with this more important person"!). Perhaps it's about making them feel they are your number one priority.

"Nothing can stop the man with the right mental attitude from achieving his goal; nothing on earth can help the man with the wrong mental attitude."

THOMAS JEFFERSON

Complaints are the worst thing that can happen for a business

- Complaints are not the worst thing that can happen. It is true that complaints are negative and unwelcome. They create stress and bad feeling. However they are also an opportunity to put things right and learn for the future too.

As Bill Gates, the founder of Microsoft put it ...

"Complaining customers are our biggest source of learning"

- We do need to bear in mind that if the problem does get to 'complaint stage', the views of the customer may have become entrenched and bitter. Could we have stopped dissatisfaction becoming a complaint? Could we have 'nipped it in the bud' at an earlier stage?



Service principles

Superior service providers behave in their jobs with the key service principles in mind ...

- *Delighting* rather than *satisfying*
 - Warm, friendly, enthusiastic, sincere – ‘you’re the number 1 person in their life at that time’.
 - Under-promise and over deliver.
 - Adding value – ‘looking out for the customer’.
 - People buy from people
 - Building rapport with the customer.
- Customers remember the first impressions and it forms opinions about us (rightly or wrongly)
 - The customer is more likely to buy if they like the person / organisation they are dealing with them.
 - To the customer, our behaviour is representative of the product or service the company provides.
- First (and last) impressions count.
 - Put yourself in the Customer's Shoes.

“People are always blaming their circumstances for what they are. I don’t believe in circumstances. The people who get on in this world are the people who get up and look for the circumstances they want, and, if they can’t find them, make them.”

GEORGE BERNARD SHAW

“The best measure of a man’s honesty isn’t his income tax return. It’s the zero adjust on his bathroom scale.”

ARTHUR C CLARKE

Superior service provider questionnaire [\(in your toolkit\)](#)

Using the scale 1-5, rate your customer service skills by circling the number that applies.

1 = NEVER do 5 = ALWAYS do

- | | | | | | |
|---|---|---|---|---|---|
| 1. Is in control (e.g. knows break times; plans tasks in; materials to hand; Is organised & focused) | 1 | 2 | 3 | 4 | 5 |
| Is aware of background (e.g. who's in; new | | | | | |
| 2. procedures; changes to routines; keeps up to date with industry / organisation developments) | 1 | 2 | 3 | 4 | 5 |
| Creates a very positive first impression in face-to-face | | | | | |
| 3. and phone communication (e.g. tidy and organised work space; looks professional; gives warm smile and eye contact; warm, upbeat voice) | 1 | 2 | 3 | 4 | 5 |
| Sincerely listens to the customer's needs and feelings | | | | | |
| 4. and acts on them promptly | 1 | 2 | 3 | 4 | 5 |
| Absorbs customer frustration and emotion, without | | | | | |
| 5. taking it personally, remaining in empathy mode | 1 | 2 | 3 | 4 | 5 |
| Takes an interest in the customer and their needs | | | | | |
| 6. ('thinks in the customer's shoes'). | 1 | 2 | 3 | 4 | 5 |
| Uses customer name appropriately in conversations | | | | | |
| 7. and discussions. Takes care to get spelling, pronunciation and form correct | 1 | 2 | 3 | 4 | 5 |
| Is warm, friendly, enthusiastic, sincere towards | | | | | |
| 8. customers (even when under pressure) | 1 | 2 | 3 | 4 | 5 |

1 = NEVER do 5 = ALWAYS do

- | | | | | | | |
|-----|--|---|---|---|---|---|
| 9. | Spots and acts i.e. takes ownership of issues, even if the issue belongs to someone else / uses initiative (e.g. checks that something has been actioned; offers solutions and suggestions; spots and reports trends that may indicate problems; looks for self development opportunities) | 1 | 2 | 3 | 4 | 5 |
| 10. | Under promises and over delivers (i.e. customer thinks 'thanks – I wasn't expecting that') | 1 | 2 | 3 | 4 | 5 |
| 11. | Thinks ahead by anticipating problems and managing customer expectations (e.g. doesn't promise without confidence we can deliver; keeps customer informed of progress) | 1 | 2 | 3 | 4 | 5 |
| 12. | Actions things for customers in a calm and controlled manner (e.g. keeps own worries to themselves, doesn't 'alarm' customer) | 1 | 2 | 3 | 4 | 5 |
| 13. | Looks for improvements and ways of becoming even better at their job | 1 | 2 | 3 | 4 | 5 |
| 14. | Asks customers for feedback on quality of department service, and own service, offered | 1 | 2 | 3 | 4 | 5 |
| 15. | Cheerful goodbye to Customers at end of visit / phone call | 1 | 2 | 3 | 4 | 5 |
| 16. | Demonstrates team working (e.g. offers help to colleagues under pressure; flexible with boss and colleagues; readily covers for team members) | 1 | 2 | 3 | 4 | 5 |
| 17. | Has a positive mental attitude (e.g. balances 'moans' with solutions; is a tonic to work with) | 1 | 2 | 3 | 4 | 5 |
| 18. | Is consistent in demonstrating behaviours/qualities above | 1 | 2 | 3 | 4 | 5 |

Skill review: superior service provider questionnaire ([in your toolkit](#))

Now you've completed the questionnaire think about the following questions ...

What did you learn about yourself?

.....

.....

.....

What examples do you have to justify your ratings?

.....

.....

.....

What effect might some of these behaviours have on your own/ the department's reputation for delivering exceptional customer service?

.....

.....

.....

Did you over-rate (or under rate) yourself?

.....

.....

.....

Superior service provider questionnaire

The last question on the previous page is interesting. How do you know? The answer lies with others who are on the receiving end of your behaviour (i.e. what you say and/or do). It may not be easy (or appropriate) asking clients and external people about your performance. The next best thing is to ask the colleagues around you, including your manager. How do they perceive your behaviour and its effect?



Sometimes we can be too hard and under-rate ourselves. On the other hand, you may get feedback that suggests that you're not as good as you think you are. Don't worry if your colleague thinks you're a '4' and you circled a '5'. A one column difference may not reveal a great deal. However if you circled a '5' and they a '2', then this is a significant difference that may need exploring.

Asking for feedback from others is a really good habit to develop at work because you learn what is effective about your own behaviour and what is not. We have included an additional copy of this questionnaire overleaf **to give to others to complete about you**. Here are a few tips about using it ...

- Give it to a range of people, not just one person. It's always best to take an average just in case someone's view isn't as balanced as others.
- Encourage honesty – let people know that you want the truth not what they think you want to know.
- Ask them to remain anonymous i.e. don't put your name on the top and return it when you're away from the desk. All this encourages people to be honest with you.
- Ask for examples from them to help understand where your skill level is.

In summary the diagnostic tool is a way of giving you visibility of your own behaviour. However, as we have discussed, it's not how you think you come across, but how do others *receive* your behaviour, how do they *feel* about it and what do they *do* about it – that's the real test. To get all '5's is aspirational, however look for the development areas – no matter how small – so that you become an even better service provider in the future.

"If one person says that you are a horse, smile at them.

If two people say that you are a horse, give it some thought.

If three people say you are a horse, go out and buy a saddle" PROVERB

Superior service provider questionnaire [\(in your toolkit\)](#)

Using the scale 1-5, rate your colleague's skills by circling the number that applies.

1 = NEVER does 5 = ALWAYS does

- | | | | | | |
|---|---|---|---|---|---|
| 1. Is in control (e.g. knows break times; plans tasks in; materials to hand; Is organised & focused) | 1 | 2 | 3 | 4 | 5 |
| Is aware of background (e.g. who's in; new | | | | | |
| 2. procedures; changes to routines; keeps up to date with industry / organisation developments) | 1 | 2 | 3 | 4 | 5 |
| Creates a very positive first impression in face-to-face | | | | | |
| 3. and phone communication (e.g. tidy and organised work space; looks professional; gives warm smile and eye contact; warm, upbeat voice) | 1 | 2 | 3 | 4 | 5 |
| Sincerely listens to the customer's needs and feelings | | | | | |
| 4. and acts on them promptly | 1 | 2 | 3 | 4 | 5 |
| Absorbs customer frustration and emotion, without | | | | | |
| 5. taking it personally, remaining in empathy mode | 1 | 2 | 3 | 4 | 5 |
| Takes an interest in the customer and their needs | | | | | |
| 6. ('thinks in the customer's shoes'). | 1 | 2 | 3 | 4 | 5 |
| Uses customer name appropriately in conversations | | | | | |
| 7. and discussions. Takes care to get spelling, pronunciation and form correct | 1 | 2 | 3 | 4 | 5 |
| Is warm, friendly, enthusiastic, sincere towards | | | | | |
| 8. customers (even when under pressure) | 1 | 2 | 3 | 4 | 5 |

1 = NEVER does 5 = ALWAYS does

- | | | | | | | |
|-----|--|---|---|---|---|---|
| 9. | Spots and acts i.e. takes ownership of issues, even if the issue belongs to someone else / uses initiative (e.g. checks that something has been actioned; offers solutions and suggestions; spots and reports trends that may indicate problems; looks for self development opportunities) | 1 | 2 | 3 | 4 | 5 |
| 10. | Under promises and over delivers (i.e. customer thinks 'thanks – I wasn't expecting that') | 1 | 2 | 3 | 4 | 5 |
| 11. | Thinks ahead by anticipating problems and managing customer expectations (e.g. doesn't promise without confidence we can deliver; keeps customer informed of progress) | 1 | 2 | 3 | 4 | 5 |
| 12. | Actions things for customers in a calm and controlled manner (e.g. keeps own worries to themselves, doesn't 'alarm' customer) | 1 | 2 | 3 | 4 | 5 |
| 13. | Looks for improvements and ways of becoming even better at their job | 1 | 2 | 3 | 4 | 5 |
| 14. | Asks customers for feedback on quality of department service, and own service, offered | 1 | 2 | 3 | 4 | 5 |
| 15. | Cheerful goodbye to Customers at end of visit / phone call | 1 | 2 | 3 | 4 | 5 |
| 16. | Demonstrates team working (e.g. offers help to colleagues under pressure; flexible with boss and colleagues; readily covers for team members) | 1 | 2 | 3 | 4 | 5 |
| 17. | Has a positive mental attitude (e.g. balances 'moans' with solutions; is a tonic to work with) | 1 | 2 | 3 | 4 | 5 |
| 18. | Is consistent in demonstrating behaviours/qualities above | 1 | 2 | 3 | 4 | 5 |

Practical examples of superior service

Here are a few examples of superior customer service from different industries. All of them take little effort and time but create that 'magic touch' which customers remember most.

A hotel

A guest fed back.....

"The little touches by every member of the team. Walking through the hotel, everyone smiles and says hello. In the Spa, there were regular (but not intrusive) checks to see if I was okay and offers of drinks. In the restaurant my waiter took time to engage me in conversation about my day. I was very, very impressed and it underlined even more strongly to me that magic service moments aren't just about extravagant gestures. It's about consistent small touches that make you feel that you're important"



Car insurance company

A female customer was very shaken and upset after a car accident. The advisor who took the claim details was comforting, patient (even though the call was extending into her lunch break) and not rushing the lady. After the call, the advisor had a quick chat with her manager and organised a bouquet of flowers to be sent to the distressed customer.

Restaurant

The waitress knew everything about the menu, including what the products tasted like; recommendations on wine; names of ingredients and country of origin of ingredients. She gathered most of this information 'off her own back' by asking questions and researching on the internet.

Practical examples of superior service

In a department store

A restaurant assistant organised a replacement outfit for a customer who had spilt coffee down herself. She also arranged for her outfit to be dry cleaned and returned to her 48 hours later.

Computer repair shop

A sales assistant drove 10 miles out of his way at the end of the working day to deliver a repaired p.c. to a customer who was desperate to get it back.

London Underground and a 117 step escalator failure

London Underground staff cheerfully provided tea and fruit juices at the top of the escalator as a way of saying sorry. One passenger said that "she was amazed and most grateful". Another passenger said: "I think the staff should provide piggy backs as well!"

Hotel receptionist

The receptionist gathered detailed knowledge of the geographical area around her hotel – attractions, transport, museums and restaurants, with maps and information leaflets from the tourist office. When asked for directions to a particular attraction, she went straight onto the internet to download a route map from the A.A. for her guest.



Car dealership

A customer purchased a car, mentioning to the sales person that she was planning to give her present 20 year-old, tired –looking car to her 17 year old granddaughter, who had just passed her driving test.

The sales person arranged for a complete valet of the car both inside and out, provided new car mats and repaired the broken wing mirror – all free of charge. The dealership organised a handover of both cars at the same time. The new-look car was handed over to a very surprised but appreciative granddaughter.

Practical examples of superior service

Film studios

A Client describing a recent experience involving a film studio they had hired to make a television commercial. Delivered with lots of enthusiasm and expression and clearly delighted:

"You should have seen them – running around, nothing was too much trouble. You'd ask them for something, and it was done quickly, in a really positive way. With the team we worked with, you'd ask for something and there were no barriers like "Well to do that I'd have to". They'd always stay late when we needed to. The manager there would always ask me first thing in the morning if everything was okay and was there anything else that I needed."

Company Receptionist

A receptionist greeted visitors specifically by name as they arrived and approached her desk. She had set up a system where internal managers who were expecting visitors would update her beforehand of who was coming and at what time. She would even have the visitor's name badge already produced when they arrived.

"If you don't walk in your customer's shoes, your customer will walk to your competitor."

ANON

Practical examples of superior service

An email from the Author to a supermarket head office:

Had to write to say how pleased I was with the service from a member of staff at your South Bristol store today, particularly as they were very busy.

I had called in on the way to a business meeting and needed an AOL installation disk for my computer. The lady (who's name I didn't catch) was on checkout duties (not on a till) when I approached. She asked me if I'd like to wait or start my shopping and she would find me. I didn't need to shop so I waited.

She asked at least 5 of her colleagues if they had seen the disks (apparently they were normally kept at the front of each checkout bay), before checking 3 or 4 of the till points herself. She returned to sincerely apologise for the delay. It was clear she wasn't going to give up. This lady checked ALL of the 30 or so till areas before again sincerely apologising. You could sense that she was frustrated that she couldn't help me.

I walked away and was about 20 metres into the car park when I heard a voice behind me shouting "Sir! Sir! I've got it!". She handed me the newly-found disk, apologising again and explaining the reason for the hold up (the night fill team had moved them overnight).

I was particularly appreciative as AOL had promised to send me a disk for weeks but nothing turned up. Also, slightly earlier in my visit, I had asked one of her colleagues for the disk. He momentarily looked up from his clip board, pointed and said "they'll be on a till point over there", and then carried on with his work!

This lady went well out of her way to help me. I am a Customer Service Trainer, and I preach about going that extra mile – creating that magic moment. It really does give me a tingle to experience it myself. I will be incorporating this example into my training - because she really did make me feel special!

P.S. Her actions ensured that, on the way back from my business meeting, I went back to the same store to buy my lunch!

Skill review: superior service

([in your toolkit](#))

The examples above may not completely fit your sector however the principles and ideas around superior service are applicable to all service provision jobs.



Think about specific examples where you could provide the 'wow' service to your customers (both internal and external). Use the space below to capture your thoughts. Then discuss with your manager to see if he or she has any additional ideas.

Your Actions

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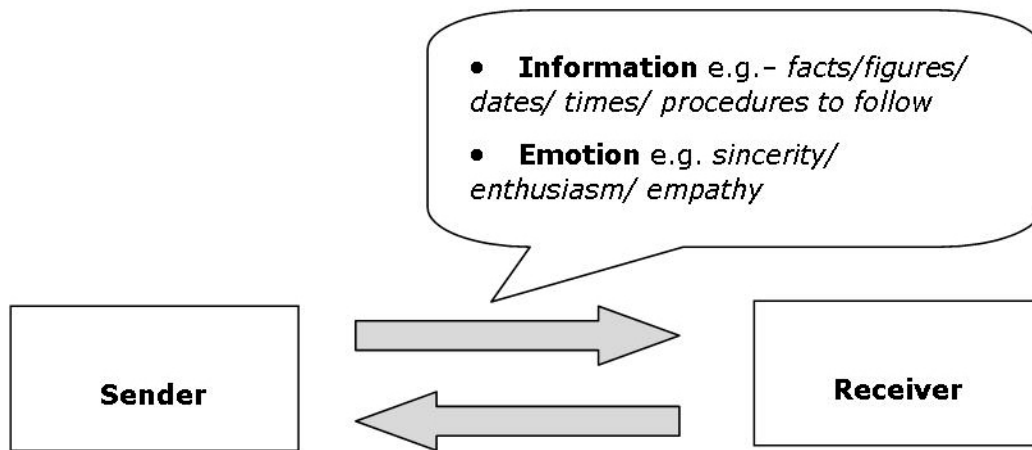
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COMMUNICATION

What is it?



It is important to get the **information** and **emotion** balance right, otherwise people's interpretation of a message may not be the same as that given out.

Benefits of Good Communication Skills

- Problems are solved in a timely manner- leading to greater efficiency.
- People understand each other's attitudes, feelings and opinions – improving customer service and team working.
- Avoids procrastination – issues are tackled quickly so that misinterpretations and assumptions are avoided.
- Decision-making is influenced – people feel part of the process, leading to higher self- esteem and morale.
- We get more of what we want!

"Communication is a two way street."

DAVID BRENT (BBC TV's The Office)

Misinterpretations in communication ([in your toolkit](#))

Communication between people at work is sometimes misinterpreted. Think of examples at your workplace where it happens and list the reasons for it happening. Then turn over for some feedback.

Your Notes

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"I know that you understand what you think I said, but I am not sure you realize that what you heard is not what I meant."

RICHARD NIXON

Misinterpretations in communication

Review these popular reasons and think of examples of where you've seen them in practice ...

- **Not listening.** People in organisations are under increasing amounts of pressure to get their jobs done. Minds can be on other things such as reminding oneself to send that email or calling that courier to pick up that package before noon, or what you're going to have for dinner tonight.
- **Too little communication.** When people under-communicate, gaps are left in people's minds. We naturally fill the gaps with assumptions. Assumptions can be right but very often, they are wrong.
- **Too much communication.** When people over-communicate e.g. go 'around the houses' to tell the listener what's on their mind, or go off at a tangent, it encourages them to switch off.

In communication, we sometimes start with 'what do I need to tell them?', as opposed to 'what do they know / what do they **need** to know?'

- **Wrong words.** Words aren't chosen carefully, or people are confused by the words used e.g. company technical abbreviations and jargon, making assumptions that they understand.
- **Wrong tone.** Try saying "That's a good idea" casually, enthusiastically and sarcastically. All of these can receive different interpretations by the Receiver.

"Companies with high positive word of mouth advertising and low negative word of mouth grew four times as fast as companies where the reverse was true."

LONDON SCHOOL OF ECONOMICS

Misinterpretations in communication

- **Wrong pace.** Too fast means listeners might miss things; too slow and recipients get bored and switch off
- **Wrong body language.** Non-verbal communication should be in-kilter with the words used and the way they are used
- **Wrong method.**

Written communication is.....

- Good for **information** and **confirmation**

Written communication (e.g. email; memo; notice board item) is good for conveying facts, figures, procedures and instructions. It is also good when you want to confirm agreement of a previous conversation. For example, you may write stating: "Thanks for the meeting yesterday. Just to confirm, we agreed the following actions with timescales....."

Written communication is *not* good for situations where we need to convince, persuade, empathise or deliver news that won't be welcome. All of these require a degree of emotion in the way we use our voice and body language. These are two things that are absent from written communication. Words on a page are flat and virtually bereft of emotion.



Misinterpretations in communication

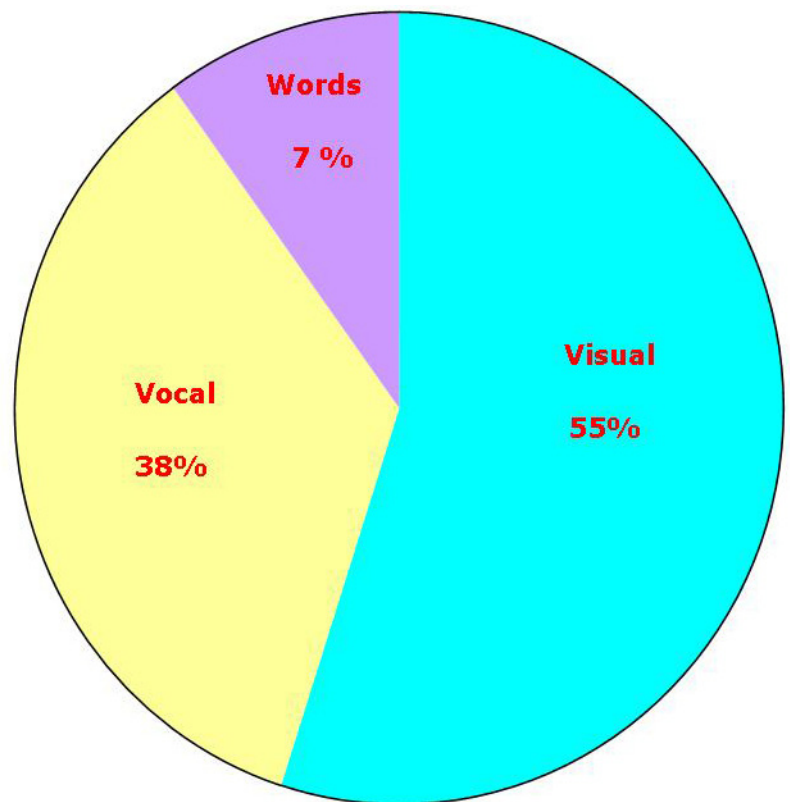
- Wrong method (continued).
 - The golden rule is never to send bad news via email if it can be avoided. It might avoid a difficult situation however it leaves the Receiver feeling cold, not respected and uncared for. It was once described as 'a coward's way out'.
 - Written communication is also not good when we need to discuss a problem and gain agreement. Using email for example, prolongs the process and wastes time as we have to wade through reams of forwarded messages with other people's opinions, reactions and potential solutions.
- **No preparation.** Have you ever been in a situation where, at the end of a conversation, you say to yourself "I wished I hadn't said that" or "I wish it hadn't come out that way" or "I didn't mean it quite like that"? Perhaps a few seconds thought beforehand about what you were going to say, how you were going to say it and thinking about the sort of reaction you would get, might have helped.

"Customers are only interested in being able to get from you a product or service with the minimum of fuss and the maximum of convenience – their convenience."

SIMON CAULKIN - SUNDAY OBSERVER

Communicating face-to-face

Professor Mehrebian (1971) suggested that in difficult conversation involving feelings and attitudes, the impact of the *Vocal* and *Visual* aspects could be significant.



- **55% Visual (non-verbal)**
 - √ Facial expressions,
 - √ Gestures, mannerisms and
 - √ Body language
- **38% Vocal (way use voice)**

The 4 P's:

 - √ Power
 - √ Pitch
 - √ Pace
 - √ Pronunciation
- **7% Words (Content)**
 - √ Facts, thoughts, phrases and ideas

EMAILING BEST PRACTICE

According to the Radicati Group an estimated 183 billion emails are sent every day. That's around 2 million emails every second sent by 1.2 billion email Users! Moreover, there are an estimated 516 million business email boxes worldwide. That's a heck of a potential for mis-communication, misunderstandings, angry words, bad feelings and loss of productivity if the messages go wrong.

As we pointed out earlier, email is good for INFORMATION and CONFIRMATION. However it's not good for EMOTION or PERSUASION. It is very difficult to convey enthusiasm, empathy or sincerity via email. You can type the words, but one doesn't get a sense of the way the words are conveyed, and therefore the message can be misinterpreted.

Here are some tips on email etiquette.

Sending emails

- In character, email is somewhere between an informal telephone call and a formal letter, but an email can be easily kept as a permanent record – a phone call is more difficult. Avoid slang, careless writing, thoughtless comments, too many dots or exclamation marks.
- Consider other communication methods e.g. picking up the phone can be much quicker than constructing an email. Email is effective for information/facts or actions. It is ineffective as a debating tool. Don't use email as an excuse not to talk to somebody.
- Consider the recipients – who really needs to know? Is it 'nice to know' or 'essential to their job to know'?
- Don't forget pleasantries at the start e.g. "Hi Jane"; "Dear Mr Customer" and consider a quick socialising comment e.g. "Hope you're having a good week"; "I trust you're enjoying the nice weather".
- Indicate the subject of the email, and the purpose, in the subject header, to help the recipient e.g. 'Your product order: confirmation enclosed'. Also indicate any urgency/action required.
- Keep to business issues, avoiding personal emails and gossiping.
- Avoid slang, careless writing, thoughtless comments, too many dots or exclamation marks – emails have the same legal status as letters.
- Be careful about criticising people and organisations by email. A hasty remark by phone will be forgotten, on e mail there is a permanent record.
- Avoid writing in capital letters (this can be the equivalent of shouting, and makes it more difficult to read).

"Behold the tortoise. He only makes progress when he sticks out his neck."

Sending emails

- All dates and currencies should be written out in full, to avoid misunderstandings.
- Line space your email into blocks e.g. a gap between the salutation and the start of the message; between the message and an appropriate closure.
- Beware of humour and sarcasm – unless you know the recipient very well.
- Re-read the message before sending, putting yourself in the shoes of the recipient – what is the tone like? What unintended messages could the recipient see in your email? Am I being succinct enough?
- Double check addressees before sending. Sending a message to the wrong recipient can be both damaging and embarrassing.
- Never e –mail in anger. Calm down first, or consider an alternative method – email isn't good with emotion. Face to face can be a much more effective way of getting how you feel across to an individual.
- If you classify all your emails as urgent, people may gradually stop treating them as such.
- Consider posting written material on the intranet/shared drives/internet rather than email as an attachment. These can slow down systems- typically anything more than 1Mb. Perhaps consider taking out pictures to reduce the size.
- Give attachments meaningful names to the Customer. If sending more than one attachment, make sure the recipient is aware of what the files are and, if appropriate, what order they should be read in.
- Signature block for external emails should, as a minimum, state ...
 - your full name
 - company name
 - company registration number
 - telephone number
 - website address



"The only place where success comes before work is in the dictionary."

ANON

Reading emails



- Deal with email at set times of the day only – twice a day is a good guide. The tendency is to open email as soon as it arrives – if it was that urgent to reply, perhaps the sender should have picked up the phone.
- Organise your emails into a filing system for quick retrieval, by creating folders with meaningful names. Using the 'Rules' wizard, create rules which automatically file the mail by specified criteria, making the process easier to manage.
- Turn off the automatic 'incoming email alert' facility.
- Deal with emails on the screen – question whether you need to print off a copy.
- Remove unwanted emails regularly – one user had 350 emails in his in-box! Always question WHY you keep an electronic copy? If necessary, file emails in the relevant folder.
- Set regular times e.g. last day of the month, to review and delete your emails.
- If you feel emotional after reading a message, give the sender the benefit of the doubt and assume there has been a misunderstanding. Have you read the message carefully? Are you quite sure you've understood?
- If it's about a complicated topic, or it's a request for ideas or opinions, consider replying by phone, or meet up with the person.
- If you are out of the office for a few days, check to see if an automated 'out of office reply' can be set up, giving an alternative person's name who may be able to help. Make sure it states when you will be returning.
- Scan read the opening few lines to see if it's relevant to you. Then delete if not.
- Email any non-work related emails home and read them tonight.
- Use the flagging system as a reminder that emails need to be responded to.
- As a guide, aim to reply to emails within 2 days.

"The most important single ingredient in the formula for success is knowing how to get along with people." THEODORE ROOSEVELT

Skill review: email ([in your toolkit](#))

Review your own emailing skills and techniques.
What could you **START** doing, **STOP** doing or
CONTINUE doing (but more often) and write your
findings below.



Your Actions

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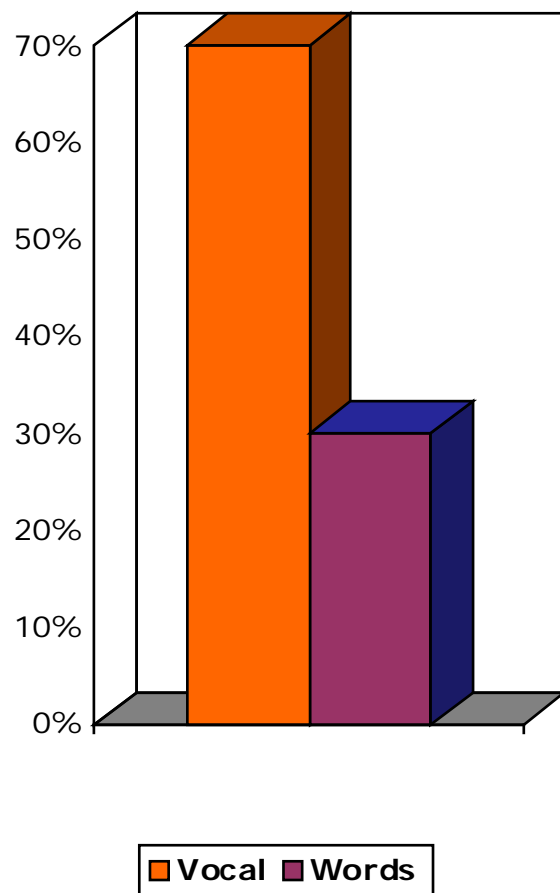
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"If it's to be, it's up to me." ANON

TELEPHONE COMMUNICATION

Telephone as a communication tool

Being on the front line of calls, the service provider plays a very important role in the projection of a professional brand image for the organisation and/ or department.



In the absence of the vast majority of body language, the percentages stack up approximately:

- 70 % Vocal
- 30 % Words



Body language on the telephone

It is said that because body language is non-verbal, then it's impossible to read the other person's body language over the telephone - you can't see them! However surprisingly there are a number of body language indicators that could be detected. These include ...

- **Smiling on the phone.** It lifts the tone of the voice and makes it a more pleasant, cheerful sound to listen to.
- **Posture.** The energy in the voice can be stifled if you sit hunched, with shoulders forward, talking down your chest into the microphone. Before you pick up an incoming call, try taking a deep breath, put shoulders back, head up and put that smile on, as you announce your opening salutation.
- **Fidgeting.** The caller can hear any sounds of impatience such as clicking biro pens or a rhythmic tapping of fingers on the desk.
- **Distractions.** The tap-tap of keys on the key board when you are checking your emails as well as (allegedly) paying attention to the caller.



Telephone skills questionnaire [\(in your toolkit\)](#)

Answer the following questions to identify your strengths and development areas when using the telephone. Tick Y (yes), S (sometimes) or N (no).

How well do you	Y	S	N
1. Take a deep breath, head up, shoulders back and smile?			
2. Answer the telephone promptly – 2-3 rings?			
3. Speak slowly and clearly?			
4. Start the call by a 'good morning/afternoon', identifying your organisation/ dept and own name?			
5. Diagnose the reason for the call quickly?			
6. Listen giving appropriate listening noises?			
7. Make notes and read back the key points so that you have a record of the call and the caller knows that you are listening?			
8. Are patient even with the over-communicators?			
9. Warn callers first if you need to put them on hold?			
10. Give your name in case the caller needs to speak to you again?			
11. Use the caller's name, rather than Sir/Madam?			
12. Show sincere empathy if caller is distressed, emotional or angry?			
13. Courteous, polite, warm, friendly, enthusiastic?			
14. End the call by asking if there is anything else you can help them with, thank them for calling and a cheery good bye			
15. Maintain the energy and enthusiasm of the call throughout the day?			

Poor telephone communicators

Features of poor telephone communicators include ...

- Slurred, unclear speech.
- Sounding bored.
- Not listening.
- Having another conversation with someone else.
- Leaving someone holding for too long - keep going back to them to ask if they are still okay holding, or shall you phone them back?
- Bad language.
- Speaking too quickly, particularly the first couple of sentences of introduction. We know it off by heart and have used it many times. See it from the point of the other person – they haven't heard it before.
- Eating/drinking whilst on call.
- Chewing pens/pencils/gum.
- Over familiarity.
- Being Impolite or flippant.
- Hanging up first! The person may think of something else just at the end of the call. The impression we could give is that they don't matter, as we have other things to get on with.



Factors of voice

Power

- Too loud, too quiet? Or is it just right? Ask a colleague to check it with you.
- **Quiet** is often associated with a lack of assertion; **loud** is associated with aggression and dominance.

Pitch

- Not too high/ too low...rich warm medium/ low pitch with some variance for interest.
- Don't forget to smile - it lifts the tone.
- Use **inflection/emphasis** - The verbal underlining of certain words to add interest or importance.

An enthusiastic, warm, sincere voice is paramount
– from the first call of the day to the last!

Pronunciation

- Ensure you are sounding word endings, and not slurring the words.

Pace

- When under pressure we tend to quicken our voice speed.
- Slow your voice down. In face-to-face conversations, we partially lip read and look for facial expressions to help us interpret what the other person is saying. This is impossible to do on the phone.
- Put short pauses in what you say – it gives the Caller chance to 'catch up'.

The ideal pace of voice is around **120/130 words per minute** – that's around 2 words per second.

We might slow the pace down further for ...

- Hard of hearing
- Strong regional accents
- English is not the first language
- With detailed information such as technical procedures, post codes or numbers

Good and poor statements on the telephone ([in your toolkit](#))

Study these poor and good statements on the phone and then look for any additional phrases you hear yourself/ others use. Try rephrasing them to something more professional.

Not so good!	Good
"Who are you?"	"May I say/ask who is calling?"
"He hasn't turned up yet!"	"He's not in the office at the moment"
"She is on a fag break!" "She is in the loo!"	"She is away from his/her desk at the moment"
"He went home early!"	"He is out of the office until tomorrow"
"Hang on" / "Wait a second"	"Are you happy to hold?"
"I've no idea"	"I'm not sure on that one. May I take your phone number and I'll ring you back in <<state timescale>>"
"What do you want?"	"Can I help you?"
Any additional phrases?	

Message taking and warm transfer

Bad message taking can lead to confusion, misunderstanding and wasting time.

Try the 6 W s of message taking ...

- **WHO** - is calling (with company/ department name if appropriate)?
- **WHOM** - is the message for?
- **WHEN** - date and time of call?
- **WHY** - the reason for the call, what is it regarding?
- **WHAT** - action required?
- **WHERE** - can they be reached i.e. their telephone number if the caller requires a call back?



"Every day, in every way, I'm getting better and better."

FRANK SPENCER

Warm transfer

Calls should never be dumped coldly when transferring i.e. dialling the extension number and putting the receiver down with no announcement of who is on the other end.



Always ...

- Explain the proposed action to the customer and gain agreement (e.g. "Are you happy to hold for a moment?")
- Ensure you have up-to-date contact details if they 'get lost' in the system.
- Bid your farewell before starting the transfer process.
- Announce the call before transfer, giving ...
 - Your name and location.
 - The name of caller.
 - Brief reason for the call.
- If it's a prospective customer, give a brief insight into personality / attitude of caller.
- If there is a delay in 'locating' the person to be transferred to, always keep the caller informed and check that they are still okay to hold. If not, give a timescale when someone will call them back.

30 seconds is about the longest time to leave someone on hold, even if there is music playing in the background!

Listening skills tips

- Concentrate. Shut off all the physical distracters like phones ringing and noise/ distractions in the work area, and the mental ones such as day dreaming and thinking about other tasks.
- Evaluate what is said. We speak much more slowly than we think, so the active listener has plenty of time to think about what is said ...
 - Why did she say that?
 - What does that mean exactly?
 - Does that make sense?
 - Is there any evidence for that statement?



- Evaluate what is not said. The active listener looks at the space between words - hesitation, confusion, and embarrassment - and to non-verbal communication or body language, and checks this back with the Speaker e.g. "You don't seem too sure about that, Mrs Shah. Shall I go through the process again with you?"
- Give verbal acknowledgments – "yeahs", "really?" and "I see" and "Thanks for that / I understand what you're saying."
- Listening noises. Beware of creating rhythmic ones where the 'listening' sound is the same – it can be a sign of not listening!
- Summarise. E.g. "Now let me get this right, what you're saying is ..."
- Avoid interrupting. We finish sentences off for people because we think we know what they are going to say.

Listening skills tips

- Body language ...
 - Lean forward. It will help you to remain alert.
 - Give verbal 'nods in agreement'.
 - Don't fidgeting – don't generate background noise.
 - Smile to raise the tone of your voice.
- Taking notes – it says to people that you want to get it right.
- Mirroring words / phrases i.e. using the same words they use to show you are 'on their level', as long as we don't overdo and mimic them.

"When people talk, listen completely. Most people never listen."

ERNEST HEMINGWAY

Skill review: telephone ([in your toolkit](#))

Review your own telephone handling skills and techniques. What could you **START** doing, **STOP** doing or **CONTINUE** doing (but more often) and write your findings below.



Your Actions

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"It takes 72 muscles to frown and only 14 to smile."

ANON

ASSERTION, AGGRESSION AND PASSIVITY

Introduction



Lots of people confuse assertiveness and aggression. Someone who is strident with their opinions and actions are often described as 'assertive'. However, inadvertently, this person may have been *aggressive* in their behaviour.

Of course, the stereo-typed views of aggressive behaviour as shouting and swearing are instantly recognisable. However many people at work who are mild mannered – they don't raise their voice or use swear words - still come across with an element of aggression.

This section will cover off the differences between the behaviour styles and introduce a 3 step technique to being assertive that can help with saying no, disagreeing or calm someone down who is upset/ irate.

Behaviour descriptions

Assertiveness is all about ...

- Being honest about yourself and others.
- Being confident.
- Trying to find solutions.
- Listening to and understanding the other point of view.
- Justifying your position.
- Showing genuine empathy.
- Being prepared.
- Challenging people without confronting.

You may like to think of it as 'bit of me – bit of you' behaviour

Quotes from assertive people

- "I suggest this approach, Ahmed. What do you think?"
- "I can see you're frustrated with this decision, however it is my final word on the matter".
- "Jane, I know where you're coming from and it's a good approach. It's just that we don't have that much time. Is there a quicker way?"
- "I do understand what you are saying, Mrs James, and I know it's frustrating, however the internet is the only place you can get hold of that information straightaway. Can I give you that web site address?"
- "I understand what you are saying, however I've got to go. Can we tackle the problem in the morning".
- "I appreciate that you thought you were entitled to <<xxxx>> however I have checked the records, Mrs Shaz, and unfortunately, in these circumstances, I cannot authorise that because <<state>>. However what I can do for you is ..."

Behaviour descriptions

Aggression can be about

- Getting your own way (at the expense of others).
- Making sure you come out the winner.
- Not listening to others.
- Giving no consideration to others.
- Being underhand.
- Being confrontational.

You may like to think of it as 'Me! Me! Me!' behaviour.

Quotes from aggressive people

- "I don't agree with you."
- "That's stupid"/ "Don't be so stupid."
- "Surely you don't believe that."
- "It's your turn to get the coffees in."
- "It's a load of rubbish – typical of the finance department – they haven't got a clue."
- "I can't help you on that one."
- "No, I can't do that for you."
- "Yes but ..."
- "No, I don't want to go out for a drink tonight."

Behaviour descriptions

Passivity is all about

- Not rocking the boat.
- Not speaking up.
- Giving in to other people's requests.
- Never saying NO.
- Running yourself down.

You may like to think of it as '**You! You! You!**' behaviour

Quotes from passive people

- "Sorry to take up your valuable time but I've got a little problem I need some help on."
- "It's only my opinion but I don't think you're entirely right."
- "If you say so, we'll go to your mum's for lunch."
- "I hope you don't mind if I borrow your stapler."
- "Okay, I'll see you there at 8pm on Friday" (when you don't really want to go).
- "I must be getting old ..."
- "I'm no good with computers."

"Success is a great deodorant."

ELIZABETH TAYLOR

Assertive technique

- 1: Acknowledge what they've said/ the situation/ how they're feeling
- 2: State your position and justify it
- 3: Suggest a compromise / way forward or just offer something helpful

Try it out for yourself. Have a look at the next page for an exercise.



"We cannot direct the wind, but we can adjust the sails."

ANON

Assertive skill practice ([in your toolkit](#))

Using the 3 step technique, write assertive responses to these scenarios ...

Scenario	Assertive response
1. Mr James is an irate customer who was promised a phone call to discuss a complaint he had about one of our products. The phone call never came.	
2. An internal customer from another department phones you and says: "I've been waiting a week now for that analysis report you were doing. Can't you cope with your workload?"	
3. Mr Amos is a customer who has 'collared' you with a query on your administration procedure. He's rather chatty, telling you all about what he's going to do at the weekend, and how nice his new girl friend is. You need to get him back on track.	
4. Mrs Mace has failed to show up for an appointment twice now. You need to phone her to arrange a new time but get across the importance of attending.	
5. A delivery from a supplier is 2 weeks late. You telephone the person in charge who says: "Yeah, I know. We're having real big problems getting hold of the items. It'll be another 3 weeks or so yet".	

Discuss your responses with your mentor or manager.

Assertive skill practice – suggested solutions



These suggested responses are not the only solutions or approaches. In fact, you may find that your responses are better quality, or use more appropriate words. However these do have the elements of the 3 step technique we wanted you to practice.

1. "I do appreciate that you're annoyed, Mr James, and sincerely apologise for the delay. Let me look into it straightaway. Are you happy to hold for a moment?"
2. "I appreciate that it's taken so long, however I have had other priorities, like the big management report I've just completed for the boss. I will finish it by the end of the day. Is that okay?"

TIP: Don't rise to the sarcastic footnote he/ she uses about coping with the workload. Keep focused on the facts, and what you are going to do about it.

3. "Well Mr Amos, I do hope you have a great weekend. Now, you were saying something about our admin processes, tell me more."

TIP: This is a difficult one – you don't want to be seen to be rude but you do have a job to do! After the comment about having a great weekend, it's probably best NOT to pause before you get him back to the paperwork issue, otherwise it's almost an invite for him to carry on.

Assertive skill practice – suggested solutions

4. "I do understand that other things may take priority. It's just that you've missed 2 appointments recently, Mrs Mace. It does waste a lot of time for us and other people could have taken the slots. Let's make a new appointment time now but do let us know as early as possible if there's a problem with it. Now, how does 3.30pm on Tuesday 24th September sound?"

TIP: Explaining the effect of people's behaviour can help influence so they understand the impact.

5. "Look, I can see your problem – it must be a nightmare. However I really need it delivered before then. What can you do for me?"

TIP: Don't accept the first offer from him. Throw the issue back to him to offer a time scale again.

There is no guarantee of success with the 3-step technique. However, with this approach, it would be very difficult for others to describe you as rude, off-hand, difficult or unhelpful. You're being respectful of others as well as get a convincing message across and promoting a solution or compromise.

*"A pessimist sees the difficulty in every opportunity;
an optimist sees the opportunity in every difficulty."*

SIR WINSTON CHURCHILL

Saying No

There can be a variety of reasons why saying NO to a task can be difficult ...

- The person making the request. If it's your manager, you cannot exactly refuse the request. However, rather than conceding straight away (passive response), why not try an assertive approach, to try to negotiate the deadline or the quality of what needs to be done.
- You like to please others and feel that NO would be an unwelcome response.
- You may be afraid of the aggressive reaction a NO might provoke.
- You may find it difficult planning out how long things take to do. So, unthinking, they accept work they are unable to deliver.
- The person making the request may think you cannot cope with your workload.
- You might not be asked again if I say NO.
- You might be thought of as un-cooperative.

The question is: **Are you on a PLATFORM OF RIGHTS to say NO?**

In the case of a colleague asking for your computer password, because they've forgotten theirs, they are most definitely NOT on a platform of rights to ask. If it's your boss asking you to do something, then **you** are NOT on a Platform of Rights to refuse. However, you may be able to challenge the request assertively, and establish a workable compromise, but you will need reasoned argument on why you cannot achieve their request.

"If you want the rainbow, you gotta put up with the rain."

DOLLY PARTON

Saying No

Giving Reasons for saying No

Beware about giving reasons for saying NO. If it's your manager, you may need to substantiate your position. If it's a customer then we are trying to 'win them over'. With others, the picture can be very different. Reasons or excuses become 'hooks' for the other person to come back to you to debate your refusal. This is ineffective because it ...

- Makes it more difficult to stick to the refusal.
- Wastes valuable work time which you could be using to get on with other priorities.

Remember: customers expect reasons why not. Hiding behind 'company policy' can be convenient for us however to the customer it can be viewed as hiding behind petty rules.

"In order to succeed, your desire for success should be greater than your fear of failure."

BILL COSBY

Positive words and phrases

Assertive service providers who use positive words and phrases are seen as helpful, solution minded and reassuring. The dictionary says the word 'positive' means "expressing certainty or affirmation to emphasise what is good"

Positive Words and Statements are the things your customer wants to hear

Examples of positive words and phrases ...

- "What I can do for you is ..."
- "You can be confident that ..."
- "I can assure you ..."
- "Immediately."
- "I'll do that personally for you."
- "I have a solution."
- "I will ..."
- "I am positive ..."
- "I will investigate this now for you ..."
- "Thank you."
- "I can confirm that ..."
- "I am delighted to ..."
- "The good news is ..."
- "From my experience, I would suggest ..."
- "That's not a problem."

Skill review: assertiveness ([in your toolkit](#))

From this last section on assertiveness, review your own behavioural style. What could you **START** doing, **STOP** doing or **CONTINUE** doing (but more often) and write your findings below.



Your Actions

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"Always look on the bright side of life."

MONTY PYTHON

DEALING WITH IRATE PEOPLE

Introduction

People Get Angry Because...



- Procedures not being completely implemented.
 - Lost paperwork.
 - Paperwork not being completed or completed incorrectly.
 - Miscommunication or unnecessary communication.
-
- Missed deadlines.
 - People being stressed – either customers being ratty or miserable; staff and managers under pressure to get things done.
 - Inflexibility in procedures (or people).
 - Promises are made and not kept.

And frequently

- Vote with their feet.
- Don't confront the situation.
- Tell other people of their experience.

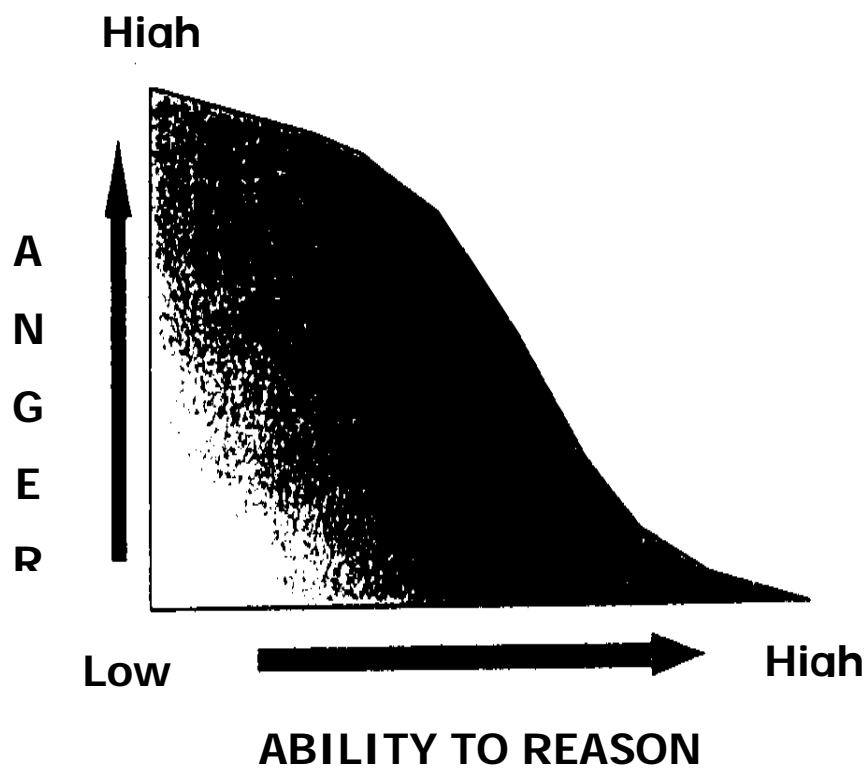
Why are they angry?

People rarely get angry for no reason at all, it's when dissatisfaction is poorly managed they become angry.

Is the anger directed at you?

Although an angry person will attack you, remember that you are listening to someone who is in an 'attacking mode'.

Tips and tactics to deal with irate people



- Do not interrupt.
 - The person is not likely to be reasonable at the height of their anger
 - Let them 'get it off their chest'.
 - Keep silent with empathetic noises.
- Apologise.
 - Apologise sincerely.
 - Don't apologise too often, it can become meaningless.
 - You can apologise for a situation without taking blame: "I'm sorry that you feel like this, Jane"; "I'm really sorry it's come to this".
- Manage your emotions.
 - Be objective.
 - Do not take it personally.

"On two occasions you should learn to keep your mouth shut – when swimming and when angry."

ANON

Tips and tactics to deal with irate people

- Be Assertive ...
 - Demonstrate an understanding of the situation, e.g.
 - "I appreciate what you are saying."
 - "I see your point, however ..."
 - "I understand that ..."
 - "I can see that you are frustrated by this delay ..."
 - Put your view point, e.g.
 - "I think the best option is for us to go back through the paperwork."
 - "It is a totally unacceptable situation and I feel quite embarrassed."
 - Offer a solution / compromise or be as helpful as possible, and reassure e.g.
 - "I suggest that I ... Is that okay? When is it convenient for you?"
 - "I'm going to deal with this personally myself."
- Beware about saying "I know how you're feeling". You probably don't and it can aggravate the situation.
- Physically
 - Challenge not confront.
 - Count to two to check your reaction – 'Act don't react'.
 - Take deep breaths.
 - Remove your frustration by talking the episode through with a colleague or the other half tonight!
- Take control
 - Be assertive.
 - Ask relevant questions.
 - Get the information right.
 - Take notes.
 - Listen carefully to what is being said.
- Questions
 - Angry people will be annoyed even further by probing questions if they see them as irrelevant, or not a contributing factor to solving their immediate problem.
 - Keep the person informed as to why you need certain information.



Tips and tactics to deal with irate people

- Use the Person's Name.
 - This can often help pacify irate people, as long as it's not used too often.
- See it as a challenge.
 - You have to have the right attitude.
 - People will respond to you in a rude way if you are rude!!
 - If you do react in a negative or rude way you may well be in the wrong job.
- Knowledge.
 - You have to be confident.
 - Knowledge goes a long way when dealing with someone who is angry, because they can see that you can take control and rectify the situation.
- Voice.
 - Keep well paced and at a 'normal' volume. The tendency is to 'mirror' the other party i.e. raise volume and speed.
- Open body language.
 - Have no barriers such as desks.
 - Arms open and uncrossed with fingers open and unclenched.
 - Face the person.
 - Give plenty of eye contact.
 - Raise the eyebrows.
 - Smile when you get any sort of agreement.
- Resolve the situation away from other people.
 - Invite into an office to sit down.
 - Ensure confidentiality e.g. tip the blinds on any internal windows.
- Set timescales for resolution.
 - If you can't meet those timescales, let them know the new expectation well in advance.
- 'Under Promise, Over Deliver'.
 - Do everything you can to give them something extra e.g. a quicker timescale; a better than normal standard of work.
 - Pull in some favours with colleagues to help you raise the customer's issue higher up people's priority lists.

Case study

Decide how you might deal with the situation below. Be specific and detailed about your approach. For example ...

- What exactly would you say?
- What action would you suggest?
- What body language would you display?
- What else could you try if your first approach doesn't work?

Make use of the tips and tactics we have already covered, as well as your own ideas. Write your thoughts overleaf and then review our thoughts highlighted on subsequent pages.

You are one of three Facilities staff for a large company based in a city. You look after meeting rooms, refreshments for meetings and the booking/ setting up of audio visual equipment. There are 4 different meeting rooms of various sizes.

George works in your company as a client account manager. He has come to see you. He has very important clients arriving in 1 hour and is going to deliver a presentation in meeting room 1. He says he booked a PowerPoint projector with Facilities when he booked the meeting. You did not take the original booking however you have his room booking recorded, with refreshments ordered. However there is no mention of equipment being ordered. The other 2 PowerPoint projectors are booked out to other meetings at the moment.

He is quite annoyed and is using a fair number of aggressive statements and phrases: "You lot are bloody incompetent"; "a monkey could do a better job than you lot".



Your approach to the case study

([in your toolkit](#))

Write in your thoughts on how you might tackle this situation. Be specific about your approach including the words you might use, the way you would use the words with any body language. Also include a range of solutions as workable compromise you could suggest.



Your Notes

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Our thoughts on the case study

- Let George let off steam - "you can't argue with someone who doesn't argue back".
- Give empathetic noises with 'concerned' facial expressions.
- Remember that George's behaviour is being driven by emotions that are derived from how he perceives the problem (put yourself in his shoes – there's a lot resting on this presentation for him).
- Don't take it personally – you just happen to be the 'punch bag' at the time.
- Sincerely apologise for the situation and reassure that there will be a solution. Remember you can apologise but not take blame e.g. "I'm sorry for this situation".
- Act not react ...
 - Avoid making any reference to the integrity of your colleague's booking – you just don't know how the mistake was made. This is his version only. We don't know whose fault it is at this stage and **it's not important to debate it either**. He wants a solution fast.
 - Don't get defensive e.g. avoid statements like "I didn't take the original booking".
 - Count to 2 before responding – it gives you that opportunity to compose yourself.
 - Being confrontational, defensive or objectionable will only inflame the situation.
- Anti-mirror his behaviour e.g. keep an even, medium volume voice; talk at an even pace.
- Perhaps buy yourself some thinking time e.g. "Let me just have a word with my Office Manager and see what we can do".

"I am an optimist – it does not seem to be much use being anything else."

SIR WINSTON CHURCHILL

Our thoughts on the case study

- Explore solutions with him. For example ...
 - Are the other 2 projectors actually going to be used? (sometimes Meeting Organisers book them just in case)
 - Are the 2 projectors required for the whole of their meetings?
 - Can George delay his meeting with the clients?
 - Can you pull in some favours with neighbouring companies around you?
 - Can you hire a projector from a local company?
 - Is there a large screen monitor available in the building instead?
 - Can George suffice with paper handouts of the slides instead?
 - Is there a local meeting room you can hire?
- Explain and confirm what you are planning to do to help the situation.
- Recognise that, as a service provider, you are not there to be abused. You may need to communicate how inappropriate George's behaviour is. For example: "Look George, I know how frustrated you are however that sort of language is inappropriate and I would like you to stop".
- If it continues, communicate your dissatisfaction again but warn him that if he doesn't stop, you will have to terminate the conversation or refer the matter to someone more senior.
- When it's all sorted out ...
 - Speak to your colleague and relay George's conversation and the actions taken.
 - Review if the booking system needs to be improved to reduce the chance of the problem re-occurring.

"Learn from the mistakes of others – you can't live long enough to make them all yourself."

ANON

Skill review: irate people ([in your toolkit](#))

Review the way you both receive and react to angry customers and internal colleagues. What could you **START** doing, **STOP** doing or **CONTINUE** doing (but more often) and write your findings below.



Your Actions

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"Criticism may not be agreeable, but it is necessary. It fulfils the same function as pain in the human body. It calls attention to an unhealthy state of things."

SIR WINSTON CHURCHILL

PERSONAL PLEDGES

That's it!

We hope you have enjoyed working on A Useful Guide to Customer Service and have learnt some things about yourself. We recommend that you follow the guidelines below (with the form overleaf) to help you develop an action plan for change.

1. Review the areas covered in the Useful Guide. What exactly would you like to do differently? The following **Skill Review** pages may help you ...

	Page
Customer journey	25
Superior service provider questionnaire	37
Superior service	47
Email	57
Telephone	68
Assertiveness	80
Dealing with irate people	89

The changes you suggest don't have to be life changing – they could be very simple things that will improve the way you perform in your work.

2. Complete the form overleaf.
3. Share your pledges with your manager/ mentor ...
 - What do they think?
 - What suggestions do they have on additional pledges?
 - How can they help you complete the pledges?
4. Agree to meet with your manager/ mentor in 5-6 weeks time to review how well you have implemented your pledges. At the same time, agree some more pledges to work on.

Good luck!

Personal pledges form ([in your toolkit](#))

In your service provider role ...

- What will you **START** doing?
- What will you **STOP** doing?
- What will you **CONTINUE** doing more of?



Start

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Stop

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Continue

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"Training that brings about no change is as effective as a parachute that opens on the first bounce." ANON

Feedback

As we are always trying to improve our Useful Guides we would appreciate any feedback you can give us on **A Useful Guide to Customer Service**. Please click on the link below to access our online feedback form ...

<http://www.pansophix.com/useful-guide-feedback.html>

If we use your feedback to improve **A Useful Guide to Customer Service** we will email you a copy of the updated version.

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<http://www.pansophix.com/learning-support-centre/index.html>

"A journey of a thousand miles begins with but a single step."

CONFUCIUS

Bryan Edwards, the author of A Useful Guide to Customer Service, graduated from University of Wales, Aberystwyth in 1981 and taught Maths and Physics in a comprehensive school for 5 years. A change of career direction resulted in Bryan becoming a graduate of the Chartered Institute of Personnel and Development (CIPD) at Kingston Business School.

He started his personnel career at Safeways in 1987, managing the Human Resource function of a £8m turnover store. In 1989, Bryan joined the House of Fraser department store group as a store-based Training Manager. After 2 years he was promoted to Head Office Training Manager, where for 8 years he managed the training and development function.

Bryan's most recent corporate experience was as Training Manager at Tiny Computers. He managed a team of 6 trainers and was also responsible for designing, delivering and evaluating a suite of management training programmes for 170 Showroom Managers and Team Leaders at Head Office. Bryan delivered over 100 management training courses in a 13 month period. He implemented the first company wide training needs analysis and developed an innovative system of training evaluation involving senior line managers in assessing the knowledge / skill improvement in their delegates.

Bryan has worked as a freelance trainer for the last 4 years and has recently set up his own training company. Bryan designs and delivers training for a range of clients all over England and Wales.