



BUSINESS *is Personal* FIELD GUIDE

A decorative graphic consisting of a dashed line that starts near the word "Personal" and ends at a small flag icon on the right side of the page.

50 CUSTOMER SERVICE TIPS TO MAKE
YOUR BUSINESS MORE PERSONAL

When it comes to customer service, business is always **personal**.

Making sure those personal connections are as strong as they can be means building brand loyalty. With multiple modes of communication and new technology being developed every day, it's essential to be able to connect in new ways to customers while maintaining the strong human connection that is at the heart of a positive customer experience.

If you've downloaded this, you're looking to keep up in a quickly changing sector. You want to utilize new customer data, keep customers loyal to your brand, grow your client base, and recruit and retain great talent. When it comes to customer experience, that's a lot of moving parts. Even with all these components in place, are you sure each piece is as strong as it can be?

Our twenty years of providing customer service solutions means that we have a clear view of the most important information you need to keep providing excellent customer service. We've gathered together our best advice from each of our team members to help you figure out where your current service stands.





Exceptional Customer Service

A GUIDE TO CUSTOMER CARE



CORA CUSTOMER SERVICE SPECIALIST

Meet Cora, our customer service specialist. She's an expert in keeping people happy and solving issues quickly and efficiently. She loves being a bright spot of connection in the middle of a customer's day, especially for customers who are feeling overwhelmed or frustrated. Cora believes that customer service starts with the first hello, and that a good customer service agent facilitates a smooth interaction all the way to goodbye. She knows that even a short positive interaction with a single customer can create a big impression and increase customer loyalty. Here are her tips for making each interaction count.

*tip no.***01**

Let's See Those Pearlies

Smile when greeting a customer in person and on the phone. Yes, your customers can tell if you are smiling. Even on the phone.

02

Appreciate the Power of “Yes”

Using positive language helps avoid accidental conflicts and miscommunication. Redirecting the conversation from negative to positive will reduce the chances of a customer being upset.

05

De-escalate Conflict Swiftly

Two negatives don't make a positive. If the customer thinks there is an issue, you aren't going to change their mind. Working together to find a solution is easier than convincing someone that they don't have a problem.

08

Just Like Mom Said: “Thank You” Goes a Long Way

Always remember to thank a customer, even if they weren't particularly pleasant. A positive close to a conversation lets customers know that even when they're not at their best, they're listened to.

03

Practice Clear Communication

Use straightforward and direct language to ensure comprehension. Speak in terms and language the customer understands; don't use jargon.

06

Be Comfortable Saying “I’m Sorry.”

Take ownership of the issue your customer is having. Free the customer from feeling blame by assuring them they're not the cause. Together, you can reach an amicable solution faster.

09

Address Lingering Concerns

Customers might not share all their worries if they feel they might be a burden. Ensure you've answered all inquiries by encouraging them to share any final concerns.

04

Give Credence to Customer Complaints

Be empathetic. Relating to your customer's struggles shows you understand their issue and are able to fix it.

07

Take Your Time

People can sense impatience. While you're speaking to someone, assure them that their concern is also your highest concern. Don't rush. Ensuring you've addressed all their concerns is essential. After each solved problem, ask if there's any additional help you can offer.

10

Review and Release

Giving a quick recap of what the you and the client discussed. It only takes a few moments and can help the customer remember what issues you resolved.



Valuable Data Analysis

A GUIDE TO BUSINESS INTELLIGENCE



DIEGO DATA ANALYST

Diego is our data analyst. He's an energetic, intelligent risk-taker—a big-picture thinker with an eye toward continuous improvement. He works hard to collect and analyze customer data to help give the customer service team a leg up. For a long-term strategic plan that works, there are several steps to formulating innovative approaches that meet performance indicators. The following ideas are his guide to the best ways to direct your intellect, energy, and financial resources.

*tip no.***11**

Spot & Fix Critical Issues Early

Use your customer service platform to locate the issue most important to your customers and fix it fast. This will improve customer experience and reduce the cost of your customer service.

12

Optimize Efficiency

Use dynamic data of your team's performance to locate issues and shed light on how to fix them. If there are repetitive tasks or processes, eliminate them to free up your team's time and eliminate frustration.

13

Improve Service Levels

Once your team is efficient, you can start to grow that competence in new areas. Cut customer wait time and increase the rate at which calls are answered. Small advantages add up quickly when it comes to customer experience.

14

Identify Customer Needs

Understand what your customers need before they do, and pinpoint what will keep them coming back. Use aggregate data to identify user experience positives and negatives, which can help you plan your next steps.

15

Find New Opportunities

Follow trends and get new ideas for new products and services. What's one thing that will take your company to the next level?

16

Get Instant Feedback

Asking your customers to take a survey after an interaction will save you time and money. Once customers have already had a problem solved or a request met, they're more likely to participate in providing feedback.

17

Understand Customer Behavior Patterns

Use case studies and buy patterns to understand what your customer is purchasing. Once you know what they're already buying, you may be able to offer them additional goods or services to improve their experience with your company.

18

Know Your Current Customers, and Get to Know Potential Ones

Identify two to three pieces of information about your customers that impacts the way you communicate. Create questions during the interaction process that may provide the information you are looking for. This offsets the cost of customer service by providing data that would otherwise take a large market research investment.

19

Utilize Market Research Intelligently

Use information about your customers to create market segments and build marketing campaigns around their demographics.

20

Discover Hidden Operational Costs

Whether the fault is with an ill-conceived product or service or your employee performance, you can put indicators in place to see how and where your company is overspending. Then, create a plan to cut those costs.



Innovative Team Leadership

**A GUIDE TO CLIENT
SUCCESS MANAGEMENT**



PETE CLIENT SUCCESS MANAGER

Good management requires juggling so many different elements: people, schedules, technology, education. Follow Pete's lead to keep every ball in the air. He knows who works well with whom and what incentives get his team excited. He also knows how to communicate data to his agents in a way that makes them eager to improve. He takes concrete action to recognize great work, and acknowledges employees that go above and beyond to exceed expectations.

*tip no.***21**

Unite Your Customer Service Team

Although terms like “family” can be overused, strong bonds between coworkers can make the service they’re providing even stronger.

22

Properly Educate Your Agents

Giving employees a protocol to follow for common situations will help them feel prepared for any scenario that might occur. Compile a document or guide that they can reference outside of hours when you’re available.

23

Perform Regular Evaluations

Help employees know where they stand by giving them a picture of the work they’ve done. Personalize feedback with specific examples when they’ve gone above and beyond to help a customer.

24

Continuously Train Your Agents

Cultivate a culture of learning. Most employees genuinely want to improve. Provide additional training to help them feel competent and confident in the service they’re delivering daily.

25

Create Incentive Programs

It’s important to reward team members for great work, but incentive programs must be sustainable. Consider offering incentives not only for rate of customers served, but for high levels of customer satisfaction.

26

Give Your Team the Right Tools

Workers need functioning technology. Keep hardware and software updated as an investment in your bottom line. Even a small tool or process that doesn’t function well can put deep cuts in productivity.

27

Use Automation Strategically

Automation can streamline service tiers and lighten the load on customer service representatives. Used well, it can create a blended guest experience where the personal elements of human connection aren’t lost.

28

Data is a Snapshot, Not a Story

Data gives essential information, but it doesn’t always tell the whole story. Use it responsibly when looking at employee productivity.

29

Be Obsessed with your Clients

Understand who your customer is. What excites them about what you offer? What are their current frustrations with the product or service? What would make their experience even 20% better? Try to understand what they’re reading, watching and listening to to know how to better serve them.

30

Help Customers Help Themselves

Great customer service should be available even when your customer service agents are not. Consider creating a knowledge index, or giving your customers access to other tools that can allow them to independently problem solve, even at 3 am.



Superior Platform Management

A GUIDE TO BUSINESS CONTINUITY



BILL BUSINESS PLATFORM MANAGER

Bill has worked with customer service technology for years. He knows that software and network maintenance is just the beginning. It's his job to keep up-to-date with every update and create contingency plans to prevent any interruption of service. Although he works behind the scenes, if all is not right in his world, no one else can function either. Here are a few tips to make sure you're following best practices, so your data is secure and the machines that house it are functioning beautifully.

tip no.
31**Be Available to Everyone, Every Way**

Use an omni-channel solution and give your customers the option to choose how they want to communicate with you. One system should funnel all types of communication into a central database so that customer impressions and experiences are easily accessible. After all, if you serve a wide demographic, your contact points should be myriad as well.

32

Promote Technological Harmony

Create an internal system that allows your customer service software to integrate with all types of software your company is using. Use a flexible API to ensure all software plays nicely together.

33

Prepare for Scalability

Use a platform that allows you to exponentially grow your business and your processes. If what your company does works for now, ask yourself if it's robust enough to support increased or even exponential business growth.

34

Use Well-Defined Workflows for a Consistent Experience

Having a protocol for each process or contingency allows for consistency across platforms and for all customers. Refining these protocols leads to a smooth experience for those providing service and those receiving it.

35

Update, Update, Update

Keeping systems and software up to date for security purposes. A software bug or malware attack costs time and money to fix -- and undermines customer trust.

36

Always Have a Plan B

You have a spare tire in your trunk. You've got to have a secondary system to back up any technology you have in place. Expect technology to fail, and then rest easy when secondary system you've prepared provides a seamless experience for your customers.

37

Protect Your Data...

Data is precious. Keep essential information safe and secure by providing personalized levels of access to team members. Be able to tell your customers with confidence that their data is protected.

38

...And Be Transparent When You're Collecting and Using It

Build trust with customers and showcase your authenticity by alerting customers when you're collecting data. Let them know how the data will be used to improve their experience.

39

Establish Common-Sense Policies for Data Disclosure

When personal data is in play, protocols for disclosing that data must protect the customer. Decide who and when others will have access to information. It can be a powerful tool for customizing user experiences and increasing customer satisfaction.

40

An Ounce of Prevention Saves Time

Use monitoring software and regular checks to ensure data is secure. Finding a security vulnerability and fixing it is the only way to catch data breaches before they happen—not after.



Excellent Talent Acquisition & Retention

A GUIDE TO BUILDING THE RIGHT TEAM

TAMARA TALENT ACQUISITION



Tamara is a people person in a people-centered business. Positive interactions are the foundation of all that she does. Her goals are to find skilled workers in unexpected places and to provide support for her team. It is important for her to keep track of successful talent-acquisition sources. She also keeps statistics on how long employees stay and records the reason why they leave. She stays at the top of her game with these ten commandments.

*tip no.***41**

Maximize Employee Referrals

Good people know good people. Use great employees to find new-hires that share your company's values and work ethic.

42

Simplify Your Application Process

Use a combination of electronic and in-person vetting. Have you had a team run through the application process to check for errors? Are your instructions clear and concise? Are forms accessible from a mobile device?

43

Embrace Flexible Employment

Consider hiring part-time contributors to supplement your core team, especially during times of high demand.

44

Proactively Plan for Increased Demand

Certain circumstances will mean an uptick in interactions from customers. Be aware of any new product or service launches, recalls, or busy seasons. Knowing when demand will be up allows you to add additional supports in advance. Proactivity, not reactivity, is key.

45

Forge Relationships with Relevant Organizations

Potential employees can be found on college campuses, in veterans' organizations, and through professional associations. Keep connections strong with others to keep a pipeline open to new talent.

46

Invest in a Remote Workforce

Customer service doesn't always look like it used to. New technology can allow workers to work remotely. This can cut overhead costs and give employees geographic flexibility, which can contribute to worker satisfaction and retention.

47

Review Your Onboarding Process

When employees arrive, do they feel at home? Prioritize and streamline a process to introduce them to the most essential skills and programs they'll need to understand from day one.

48

Make Work Feel (a little) Like Home

Personal touches make an office environment feel welcoming. Even small additions such as plants, warm lighting, and healthy snacks have huge added value to team members.

49

Create Internal Opportunities for Advancement

Be ready to recognize and promote talent when you see it. This might also mean keeping an eye out for workers who are ready for additional challenge or responsibility.

50

If an Employee Decides to Leave, Know Why

People leave employment for many reasons. Your job is to determine if there are any underlying systemic issues that could be affecting a group of employees. During exit interviews, listen for repeated phrases or common themes that point out problems you can nip in the bud.



Looking for help improving your customer service?

Let's Talk

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