Career Development

FOR SUPPORT CENTERS

Effective Communication Strategies for Great Customer Experience

Service Strategies

Advancing Service Excellence

Effective Communication Strategies for a Great Customer Experience

Student Course Book

Developed and Published by

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ABOUT SERVICE STRATEGIES CORPORATION

Service Strategies advances service excellence for quality-minded organizations by providing industry-standard certification and training programs that ensure delivery of consistent, high-quality customer service and support.

Service Strategies applies a proven benchmark process to its certification programs for continuous service improvement. The company's tailored programs advances the skills and competencies of service and support professionals and also leads to increased organizational effectiveness.

Service Strategies is staffed with highly skilled service and support consultants who understand today's complex support operations. Each of our seasoned practitioners has many years of industry experience and possesses the experience needed to help meet your specific requirements for improving the support organization.

Service Strategies provides a variety of consulting services, including implementing the appropriate support model for your environment, support assessments, service marketing programs, support automation plans, customer satisfaction surveys, facilitates design, worldwide implementation of Customer Information Systems, formal improvement plans, and more.

Service Strategies develops and delivers specialized customer service and management training for service and support professionals. Service Strategies' customer service training programs provide the skills necessary for support reps to effectively deliver support, including electronic support skills, problem solving and troubleshooting skills, providing real-time support environment, communication skills, dealing with all types of customers, teamwork, and more.

Service Strategies is the program administrator for the industry-leading Service Capability & Performance (SCP) Certification program.

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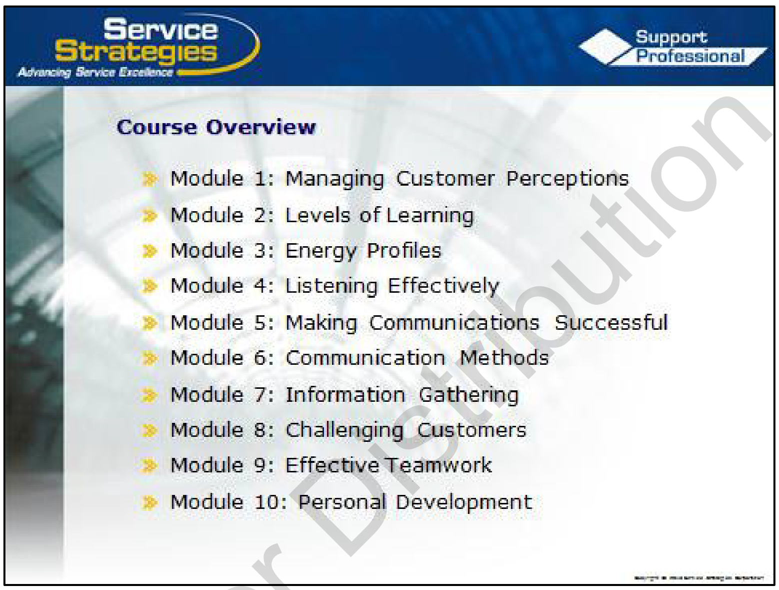
Service Strategies' development of this course is published solely to instruct students on the issues associated with leading delivery of the highest quality technical customer support possible. In the event third party products are mentioned on this book or other components of this training course, including instructor-led instruction, or web-delivered training, this is done so for explanation purposes only and does not constitute an endorsement of these products.

ABOUT THIS COURSE

COURSE OBJECTIVE: Given this Student Course Book, the student will be able to effectively and efficiently anticipate, identify, and resolve customer problem inquiries.

Course Overview

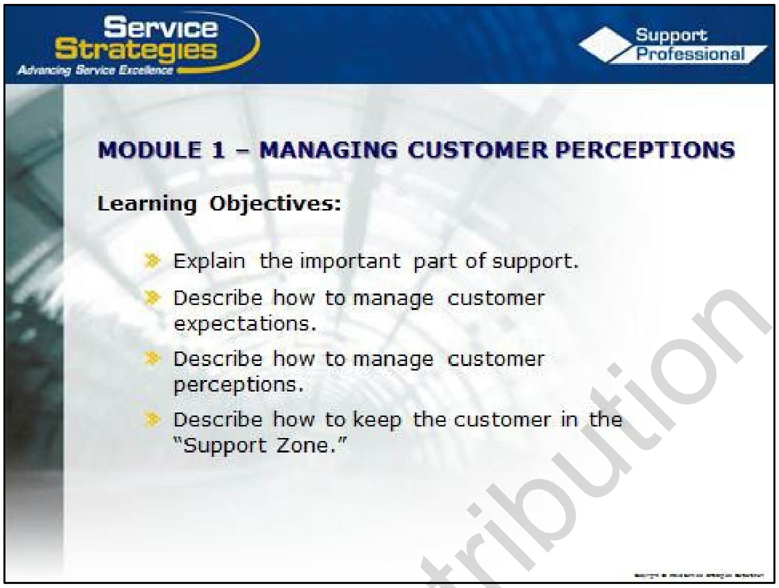


This course contains learning materials designed to introduce today's Technical/Customer Support Professional to basic soft skills concepts and strategies designed to help them anticipate, identify, and resolve customer problem inquiries effectively and efficiently.

Designed in consultation with over 40 leading software companies in the United States and Europe, this SCP Certification course of study will quickly bring real skills to real Support Center situations. These new communication skills will benefit the participants and the respective companies they serve.

Good Luck and Good Learning!

MODULE 1 – MANAGING CUSTOMER PERCEPTIONS



Learning Objectives for Module 1 – Managing Customer Perceptions:

- Explain the important part of support.
- Describe how to manage customer expectations.
- Describe how to manage customer perceptions.
- Describe how to keep the customer in the "Support Zone."

The Important Part of Support

The most important part of customer support is customer satisfaction. The degree of customer support quality, and therefore customer satisfaction, affects the entire organization. Customer support is a perceived value; it is the support professional's responsibility to deliver superior customer support.

Although there are many factors that determine the image of your company ranging from leading-edge technology to financial factors, what you do in the technical support organization is a **differentiator**. You are representing the company in your role and it goes well beyond technical questions and answers and problem solving. You are in the role of **managing customer satisfaction** which is **critical to your organization**.

*Perception is, according to Stephen P. Robbins, "a process by which individuals organize and interpret their sensory impressions in order to give meaning to their environment." **Perception is not necessarily based on reality, but it is merely a perspective from a particular individual's viewpoint.** When dealing with the concept of organizational behavior, perception becomes very important because 'people's behavior is based on their perception of what reality is.' (Robbins, 2005)*

Managing Customer Expectations

Description of Customer Expectations
The root word of "expectation" is expect! Customers contact you looking for support in resolving their issue(s). They expect to be served promptly by a friendly and knowledgeable support professional that will resolve their issue(s) efficiently and effectively.

There are two types of customer expectations: **realistic and unrealistic**. Realistic expectations usually result in positive perceptions provided that the support was good. Unfortunately, unrealistic expectations can result in negative perceptions. If we reset those expectations to be realistic, we can turn the negative perception into a positive one.

What expectations do your customers have?

____

____

____

For starters, they expect a solution. Your customer expects the support professional to understand their problem (i.e., possess technical knowledge) and provide the correct solution. They want to communicate with a person who can immediately help them with their technical issue. They expect that you will be accountable to do what you say you will do and they have expectations as to when this will happen.

If your ideas differ from theirs, but are not clarified or even discussed, then there will be a mismatch which can lead to customer dissatisfaction. For example, what does it mean when you say, "I will get back to you as soon as possible." To the customer, that may mean "within an hour." To you, that might mean "in a couple of days." It is up to you to effectively manage customer expectations.

How do you effectively manage their expectations?

Expectations are all about **what** level support will be provided to the customer and **when** will their issue be resolved. This is not easy. Sometimes the WHEN may require further discussion of the status of the situation. Most customers have high expectations when they contact you based off of their previous experiences with your company.

<u>Most support requests can be categorized to some extent:</u>

- Is it something you have seen before and know how to get the information?
- Is it something you need to discuss with an associate or senior support technician?
- Is it an issue where you must go to a lab to troubleshoot or test?
- Is it a question or issue you need to discuss with resources outside of support?

These are all factors that are used to ascertain the WHEN.

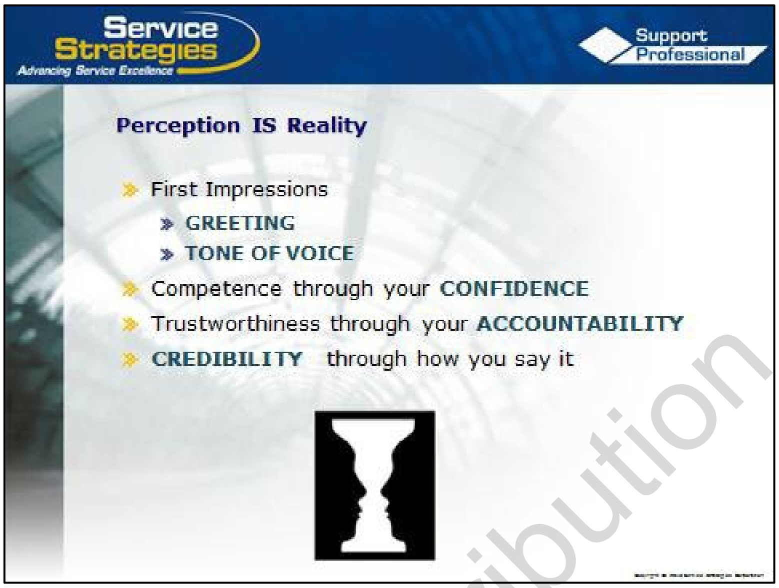
From Expectations to Perception

Managing expectations has everything to do with managing the perceptions of your customers. Now that we know about customer expectations, we also need to understand how expectations relate to perceptions. The customer's perceptions will be based upon the quality of customer support you provide. The customer's expectations are the starting point. It is through <u>communication</u> between the support professional and the customer where perceptions are formed.

Daria Kelly Uhling explains in her blog titled "How to Create Customer Perception" the value of touchpoints or communication between you and your customers. Each influence, whether via a marketing piece, phone conversation or face-to-face meeting with the customer is a touchpoint. Each touchpoint is an opportunity to influence customer perception. (Daria Kelly Uhlig, 2013)

But what if negative perceptions are formed by your customer during your interaction? In this case, the support professional must reset the customer's expectations through improved and revised communication. You need to re-examine your customer's expectations and try to change them from unrealistic to realistic. Note that it is possible to change negative perceptions but they do change slowly.

Perception IS Reality



It is not what you do, but what the customer perceives you do. It is not who you are, but who the customer perceives you are. Truly, you never get a second chance to make a first impression.

- ***Greeting:*** Your greeting provides the customer with their first impression of you and your company. Smile when you greet someone and that will add to your sincerity. Providing a friendly greeting will enhance your existing relationships or start building a connection with a new customer.

- ***Tone of Voice:*** Your tone of voice relays your overall attitude. The tone of voice shows your concern for your customer and determines in their minds whether or not we are sincere, trustworthy as well as many other character traits.

- ***Confidence:*** The degree of confidence you have will determine the customer's degree of acceptance of the resolution you provide to the customer. In fact, based on your confidence, the customer may think you are very knowledgeable on the topic.

- ***Accountability:*** Your degree of accountability in consistently delivering on your promises will reflect your trustworthiness to the customer. If you do what you say you are going to do, this will establish your integrity and the customer's trust in you.

- *Credibility:* Your credibility is based upon how you say your message. If you are too transparent and tell the customer too much about yourself (e.g., inexperience) or your organization, you will lose credibility.

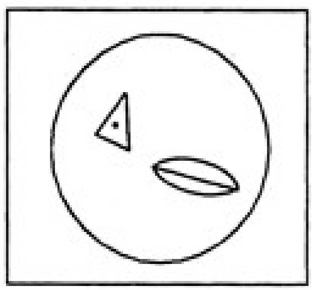
It is your responsibility to manage perceptions during the time you spend with your customer. Have you ever been disappointed as a customer? If you have, you probably realize how this sets your attitude and perception of that company that can last for a very long time.

Once the customer has formed a negative perception, it may take many positive interactions to overcome that negativity. It is not impossible to change them, but it takes a lot of time and energy. This is why EACH encounter you have with a customer is critical to your company's success.

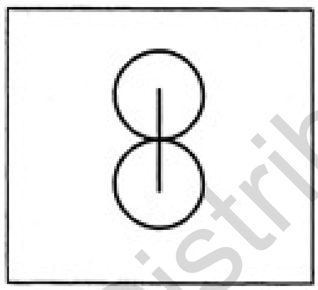
The customer's satisfaction is based on their perception of the quality of support received by your company!

ACTIVITY – PERCEPTIONS

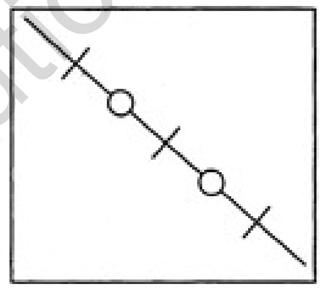
1. Consider each picture below.
2. Write YOUR perception on the first line below each picture.
3. As you discuss as a group, write down other's perceptions on the second and third lines.



1. ____________________
2. ____________________
3. ____________________

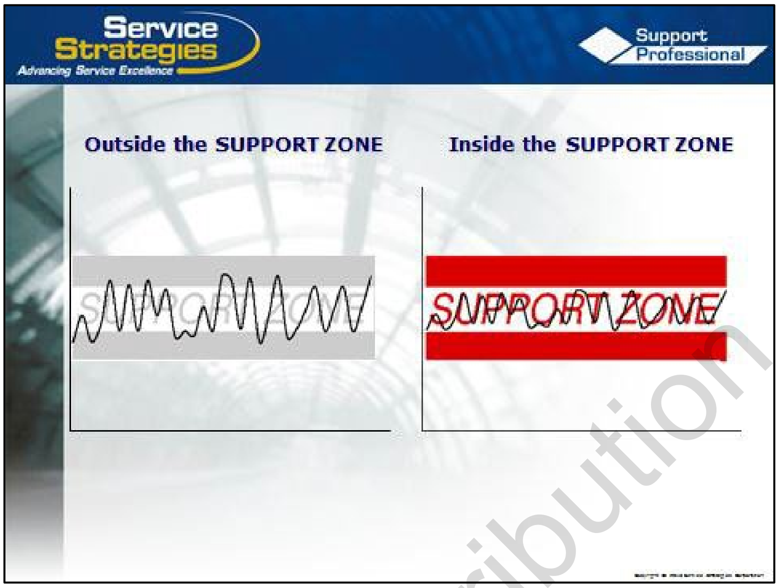


1. ____________________
2. ____________________
3. ____________________



1. ____________________
2. ____________________
3. ____________________

Keeping the Customer in the SUPPORT ZONE



During each support interaction you have with a customer, the attitude they have, their emotional state, and their satisfaction, are all-important to your success. Your responsibility is to manage the situation to keep them within control limits of the SUPPORT ZONE.

Keeping customers in the "zone" is hard work. This is different than talking with your friends and being able to say and do whatever you want. With customers, you have to be constantly on the alert with what you say and how you say it. You need to keep the customer involved and in control. If the customer's emotional state goes outside the SUPPORT ZONE, you need to take action to get them back in the "zone."

In the graphic above, the SUPPORT ZONE represents the interaction with your customer and the line represents the EMOTIONAL TONE of that interaction!

Understanding the SUPPORT ZONE

1. When the line exceeds the UPPER limit of the SUPPORT ZONE, what emotions would that represent? ____

2. When the line exceeds the LOWER limit of the SUPPORT ZONE, what emotions would that represent?
   ____

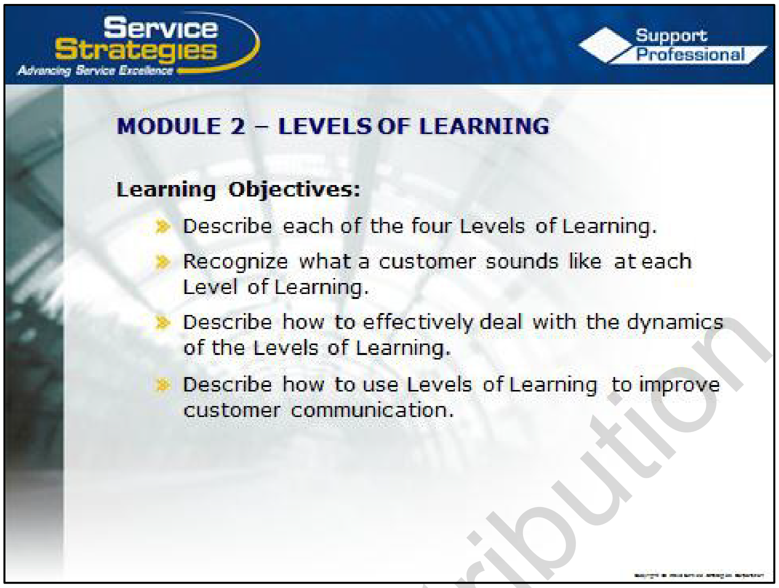
3. When the line stays within the SUPPORT ZONE, what would that represent?
   ____

In order to be successful with customers, you need to manage the situation to keep them in the zone by being constantly aware of your own actions. If you have a bad tone, are condescending, or speak technically beyond their ability to understand, they will get out of the SUPPORT ZONE and their perceptions become negative.

MODULE 1 REVIEW QUESTIONS

1. What is the most important part of customer support?
    a. Technical proficiency
    b. Customer satisfaction
    c. Voice tone
2. Why would customers already have realistic expectations when they contact your company?
    a. Previous positive support experience either with your company or another company
    b. Previous negative support experience with another company
    c. Customer's level of knowledge regarding the issue
3. Whose responsibility is it to manage customer perceptions?
    a. Support professional
    b. Customers manage their own perceptions
    c. Both a and b
4. It may take many positive interactions to overcome a customer's negative perceptions.
    a. True
    b. False
5. When the line stays within the SUPPORT ZONE, what emotion would that represent?
    a. Boredom
    b. Anger
    c. Cooperation

MODULE 2 – LEVELS OF LEARNING



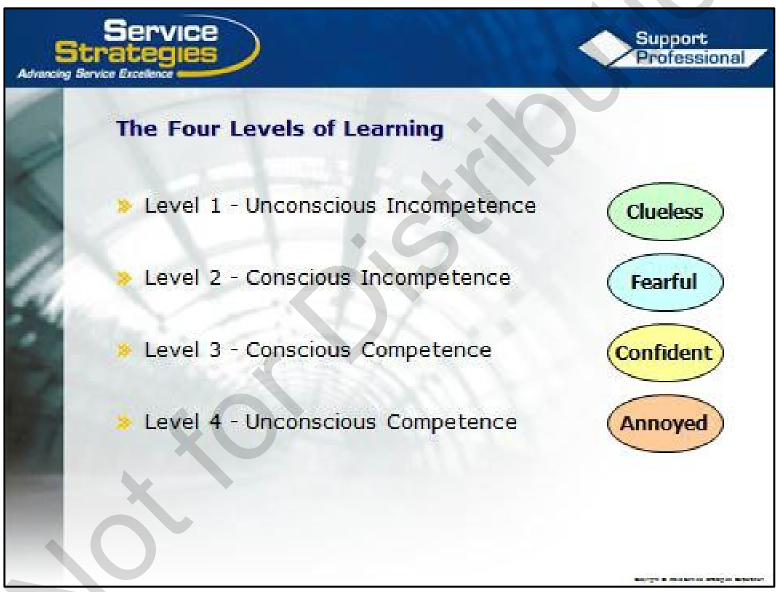
Learning objectives for Module 2 - Levels of Learning:

- Describe each of the four Levels of Learning.
- Recognize what a customer sounds like at each Level of Learning.
- Describe how to effectively deal with the dynamics of the Levels of Learning.
- Describe how to use Levels of Learning to improve customer communication.

The Four Levels of Learning

The Conscious Competence Learning Model has frequently been attributed to the works of Abraham Maslow. The concept is most commonly known as the 'conscious competence learning model', or 'conscious competence learning theory.' (Chapman, 2013)

Each customer has varying degrees of knowledge on products, systems, and services. In some cases, they are experts, but in other instances may be less knowledgeable. Likewise, based on the questions and issues of your customers, you too have various levels of knowledge.



Let's look more closely at each Level of Learning.

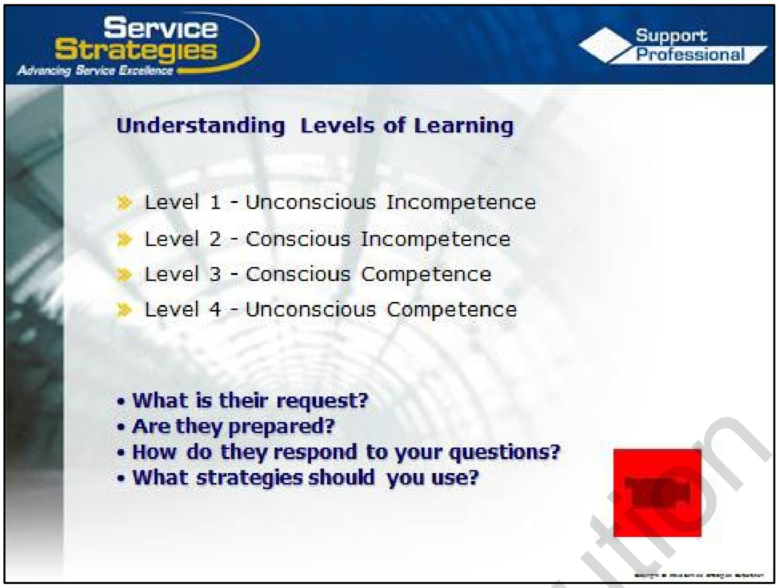
Level 1: Unconscious Incompetence – The customer "**doesn't know what they don't know**." They are clueless because they are at the beginning of the learning process, and are usually a new customer. The caller will be passive in helping to develop a solution and require you to take full leadership and resolution responsibility. Be gentle and patient with them as you guide them through the troubleshooting process.

Level 2: Conscious Incompetence – The customer "**knows what they don't know**." They are fearful, self-conscious and easily embarrassed as this is a scary place to be. They have a basic understanding of the product, but usually are still in a training mode. Some of them are eager to learn but are afraid of sounding stupid. You have primary call leadership and solution responsibility, but some customers at this level may help identify initial areas of investigation.

Level 3: Conscious Competence — The customer "**knows what they know**." They are knowledgeable about issues and procedures, are confident with most actions, and they know how to find most of the answers; they just need a little help. Typically, they will do some troubleshooting and investigating prior to contacting you. Since the customer is generally focused, they just need your assistance to answer their questions or guidance as to where the solution lies. This is more of a collaborative conversation.

Level 4: Unconscious Competence — The customer "**does not know what they know**." Those who are a Level 4 have forgotten how they got so smart or experienced. They do most of the troubleshooting themselves before they call for support and frequently explain what the problem is before you can ask your first question. They can be annoyed and impatient with troubleshooting questions and can be difficult to talk to when working with them on an issue. They do not require teaching and are asking you to reaffirm what they think they already know. They may even discover the solution while describing the symptoms to you.

It is your responsibility to understand how to deal with all customers and adapt to their changing needs.



ACTIVITY – UNDERSTANDING LEVELS OF LEARNING

Answer the questions for your assigned Level of Learning.

Level 1: Unconscious Incompetence

- What is their request?

  ____

- Are they prepared?

  ____

- How do they respond to your questions?

  ____

- What strategies should you use?

  ____

  ____

  ____

Level 2: Conscious Incompetence

- What is their request?
- Are they prepared?
- How do they respond to your questions?
- What strategies should you use?

Level 3: Conscious Competence

- What is their request?
- Are they prepared?
- How do they respond to your questions?
- What strategies should you use?

Level 4: Unconscious Competence

- What is their request?
____
- Are they prepared?
____
- How do they respond to your questions?
____
- What strategies should you use?
____
____
____

In order for communications to be successful, you must first **recognize the situation**, i.e., the customer's Level of Learning, and then **adapt to it**.
You must **be flexible** and **guard against making assumptions** about the customer's Level of Learning to be successful in your communications. Ask questions to determine their level and confirm their understanding.

Remember; if you talk over or under the Level of Learning of your customer, this will result in miscommunication and distrust that will probably complicate the issue. Your success depends upon your ability to adapt to their needs.

Your goal is to become a Level 3 in your area of expertise, NOT a Level 4.

VIDEO – LEVELS OF LEARNING

As you watch the video clip, determine the Level of Learning for each person listed below. Be prepared to discuss why you chose this level.

Level One:	Unconscious Incompetence
Level Two:	Conscious Incompetence
Level Three:	Conscious Competence
Level Four:	Unconscious Competence

Carlos: (Support Rep) Level _____

Justine: (Customer) Level ______

Stacey: (Support Rep) Level ______

Angela: (Support Rep) Level ______

Mia: (Support Rep) Level ______

Warren: (Customer) Level ______

A Dynamic Process

You need to deal with the dynamics of changing Levels of Learning to be successful in your communications. Support professionals understand that moving between Level 1 (Clueless) and Level 4 (Annoyed) with every new assignment is a dynamic process.

How do you react to these changing dynamics? You are the communicator so it is your responsibility to learn how to be flexible with your communications to effectively work with the customer. Use the effective listening skills you will learn in this course to effectively listen to your customer. You must listen carefully to determine their knowledge level and confirm their understanding of the issue and its solution. We will learn more about listening skills later in this course.

The customer's Level of Learning is likely to change within each discussion. Your own knowledge level will change as you gain experience with the product. When you are dealing with management, co-workers, or other departments, the Levels of Learning should be considered.

ACTIVITY – RESPONDING TO LEVELS OF LEARNING

Identify the Level of Learning for each statement or question below. List ideas on how you would respond and what strategy you would use for each.

1. **Please escalate this call to management as I don't think you would understand my issue at all!**

Level: ____________________

Response: ____

____

____

2. **I am not sure if this is right and I'm sorry, but I should have known this by now.**

Level: ____________________

Response: ____

____

____

3. **I cannot figure out why I received this error. I followed all the relevant steps provided in your installation document several times, but I am still getting this error.**

Level: ____________________

Response: ____

____

____

4. **My system just won't turn on and I don't know where to go from here.**

Level: ____________________

Response: ____

____

____

5. **I tried re-booting the system but I am afraid it overcomplicated the situation because the system is still frozen.**

Level: ____________________

Response: ____

____

____

6. **Of course I have done the basic steps to fix it! Please don't waste any more of my time and let's get straight to the problem.**

Level: ____________________

Response: ____

____

____

7. **How do I shut down the computer without closing the windows in my house?**

Level: ____________________

Response: ____

____

____

How Do We Improve?

When working in technical support, you are constantly involved in a cycle of learning. It is part of your responsibilities to learn new products and other technical information and adapt your communication style based upon your own level of knowledge.

When an event occurs and you do not know all the technical information or even appropriate questions to resolve it. This may be frustrating, but you still need to gather pertinent information from your customer. Even if you may be consciously incompetent on the subject matter, nevertheless, you should use your professional voice to always sound confident. But you should feel confident; after all, you do have all your organizational resources available to you!

The support professional must do some preliminary research; this may result in asking for mentoring/training so you can gain some knowledge on the subject. While you may not quite reach the level of Conscious Competence on the entire product, you will be able to respond to your customer's questions with confidence during your next support call.

This is a cycle you are constantly going through. When you have reached the Conscious Competence level on this version of the product, operating system, or network, what happens? It changes and you start the cycle again.

MODULE 2 REVIEW QUESTIONS

1. What is the one word description for Level 2?
   a. Clueless
   b. Fearful
   c. Confident

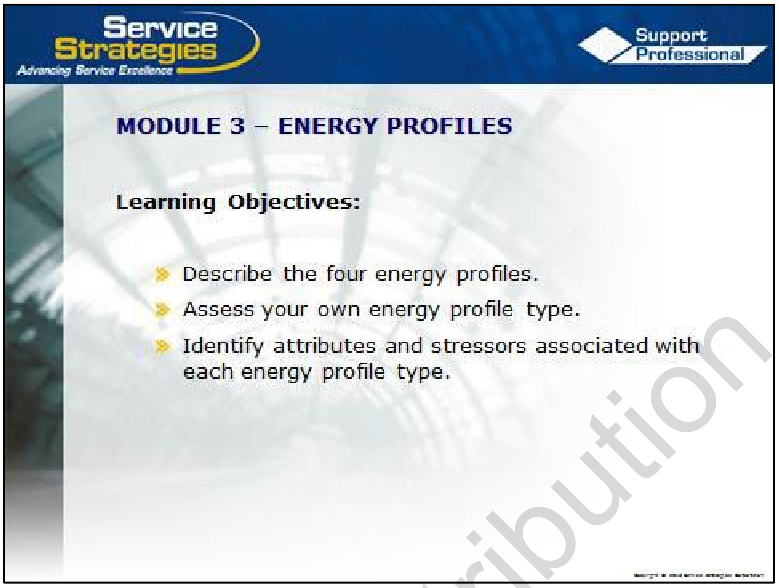
2. What must you do to make communication successful once you have determined your customer's Level of Learning?
   a. Educate your customer to raise their Level of Learning
   b. Use written communication to address the issue
   c. Adapt your communication to your customer's Level of Learning

3. Which approach should you use when working with a Level 1 customer?
   a. Be gentle and patient
   b. Give them options
   c. Acknowledge their expertise

4. Which Level of Learning customer would likely perform thorough troubleshooting before contacting your company for support?
   a. Level 1
   b. Level 2
   c. Level 3

5. Your customer's Level of Learning may change during your discussion.
   a. True
   b. False

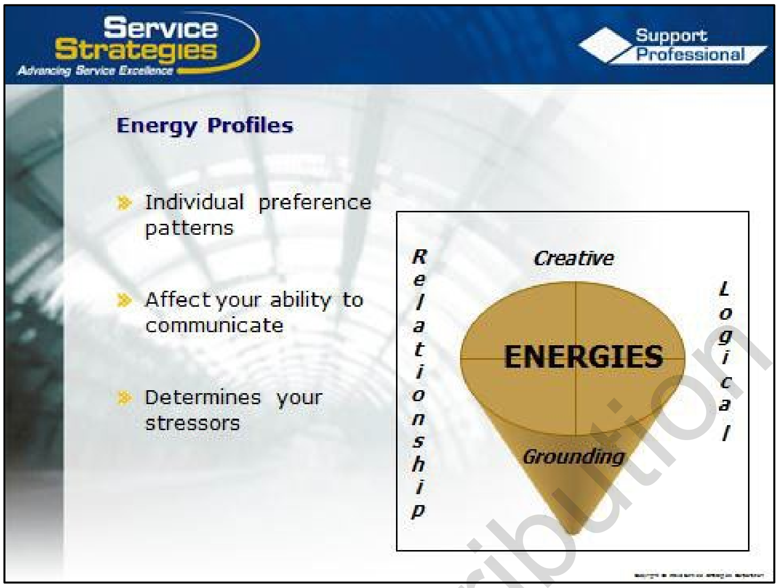
MODULE 3 – ENERGY PROFILES



Learning objectives for Module 3 - Energy Profiles:

- Describe the four energy profiles.
- Assess your own energy profile type.
- Identify attributes and stressors associated with each energy profile type.

Energy Profiles



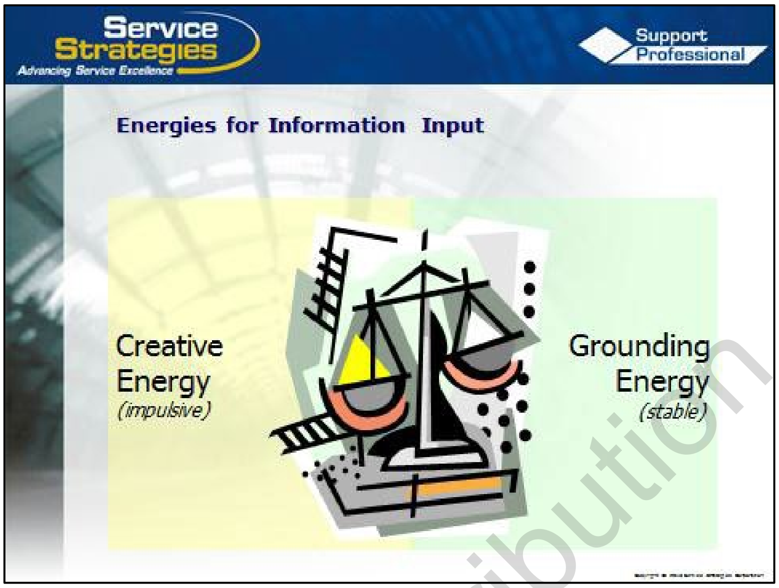
You have an individual energy profile that affects how you behave. Understanding your own profile will help you to be more successful in communications.

There are four energies from which you can choose as you input and process information: **Creative Energy, Grounding Energy, Logic Energy, and Relationship Energy**. Each of the energies has various characteristics and everyone has one or two preferred energies. The combination of these four energies makes up a unique energy profile. Since you tend to play to your strengths when communicating with customers, your approach to gathering information or problem solving may be wrong 50% of the time.

A mismatch of energies when communicating can create stress for both parties. Awareness of the energy differences and matching the appropriate kind of energy that the situation calls for can help you cope and reduce the stress. For effectiveness in communicating with customers, the message is more likely to be accepted if you adapt to the customer’s energy style.

You must be aware of your own unique profile and recognize your strengths. While you need to seek out situations where you can maximize these strengths, you should also be flexible and learn to adapt to the situations in order to be most effective in your communications.

Energies for Information Input



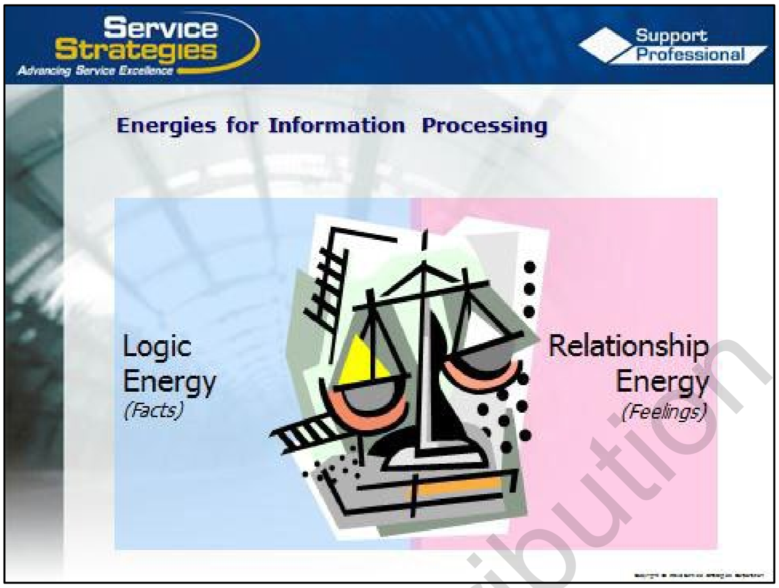
Two energies are used for gathering information: Creative and Grounding Energy.

Creative Energy people are in touch with hunches and possibilities, trust the classic "sixth sense," and can work on very little concrete information. Highly creative people often experience a "flash of insight" or inspiration that allows them to see situations in a different light, to detect possibilities, and to trust their hunches and first impressions about situations. They tend to work in bursts of energy and remain open and optimistic about life.

People with a dominant **Grounding Energy** rely on their five senses to provide them with tangible information about the present moment. They focus on details and in fact are very good at noticing the details. They base their actions on observations and reality. Dominant Grounding Energy people tend to be practical and oriented toward action.

Knowing your customer's preferred method for inputting information can help you tailor how you provide support to them.

Energies for Information Processing



Two energies are used for processing information: Logic and Relationship Energy.

With **Logic Energy**, decisions are made objectively based on facts, formulas, and rational analysis. People with logic as their dominant energy are most comfortable dealing with cause-and-effect relationships, not feelings. They create sequences and plans by using existing methods and procedures to solve problems.

Customers with high **Relationship Energy** make their judgments based upon feelings, likes and dislikes, and emotions. They are sensitive, both to others and to themselves, and will always be asking, "How will this affect others?" They often compare the present with periods in their life when they experienced the same feelings.

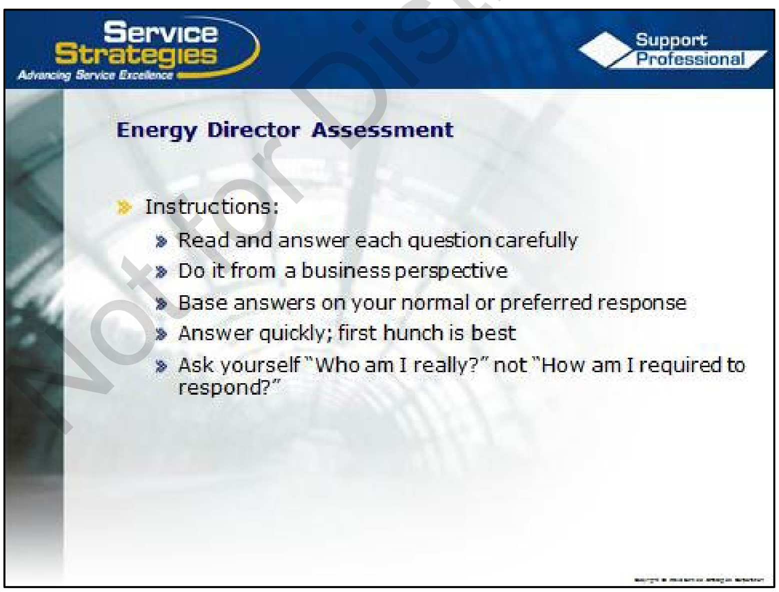
If you know your customer's preferred method for processing information, then you can adjust your communications to be more quantitative or feelings oriented as appropriate.

ACTIVITY - ENERGY DIRECTOR ASSESSMENT

This tool is called the "Energy Director System™." This tool will help you determine your energy preference. You need to understand how you most prefer to take in and process information. Being able to identify the correct energy profile in your customers will certainly help you to adjust to their preference and improve communication.

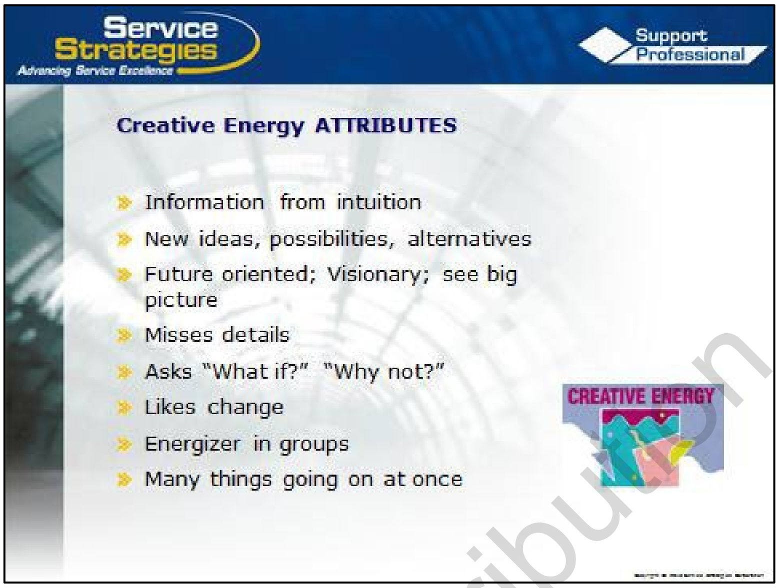
This tool will also teach you:

- Why certain situations cause you great distress, while others do not.
- How to better understand the root cause of conflict with other people.
- What strengths and weaknesses you bring to the workplace.



My dominant energy profile is: ________________________________

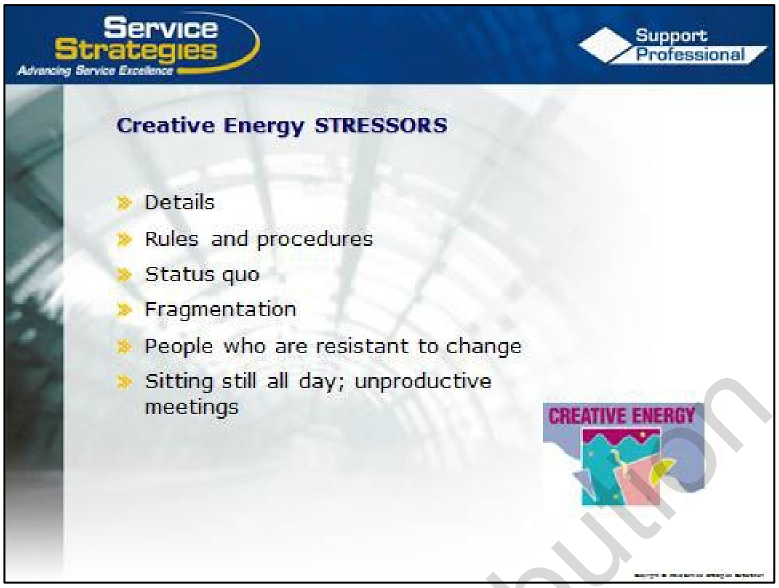
Creative Energy Attributes/Stressors



Creative Energy knows no limits. It's not constrained by time, place, or practicality. You must recognize this in dealing with Creative Energy customers.

Attributes of people who have a strong Creative Energy are:

- Information and ideas are generated from their intuition. They get "flashes" of new ideas.
- They are open to new ideas, possibilities, and alternatives and enjoy developing them.
- They are future oriented and are sometimes called a "visionary;" they see the big picture – Generally, the founder of a new business is high in Creative Energy.
- They miss the details. Changes in their environment are generally not noticed immediately. In fact, for some very creative people, you could change the furniture in their office and they won't notice it for several days.
- Creative Energy people ask "What if?" and "Why not?" They like change and don't like doing the same thing over and over.
- Because they love to create ideas, they tend to be the energizer in group settings.
- Multi-tasking is preferred and they have many things going at once.

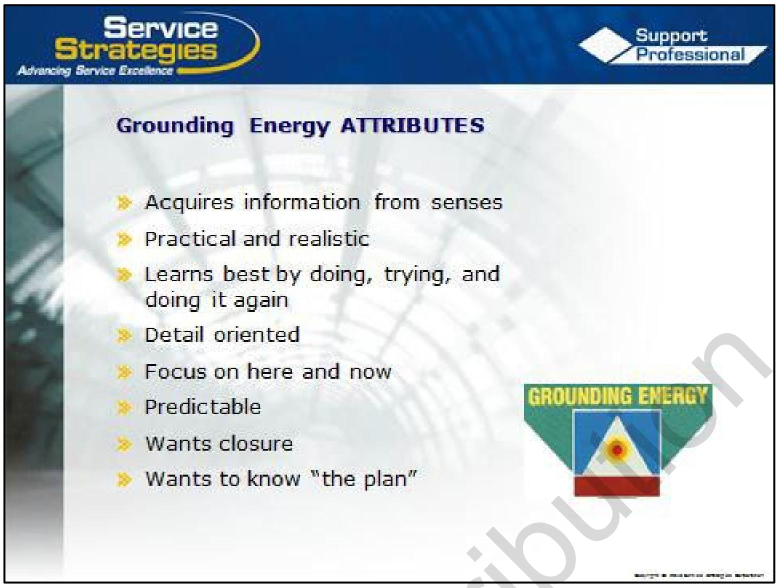


You must recognize that when your creativity or that of the customer is stifled, stress will result and communications will be inhibited.

Factors that will create stress in a Creative Energy person are:

- The details of life such as the paperwork and documentation feel like a waste of time to a Creative Energy person.
- Rules and procedures stifle the "thinking out-of-the-box" tendencies of this energy.
- Status quo and doing things the same old way become dull and boring.
- Sometimes Creative Energy people become fragmented in their lives because they've started so many tasks and haven't completed many. For example, Creative Energy people tend to buy a lot of books, but never finish reading any of them.
- The people who are resistant to change are also the ones who don't accept all the ideas and alternatives that are developed.
- Creative Energy people generally have a lot of energy and it is difficult for them to sit still all day and to participate in unproductive meetings.

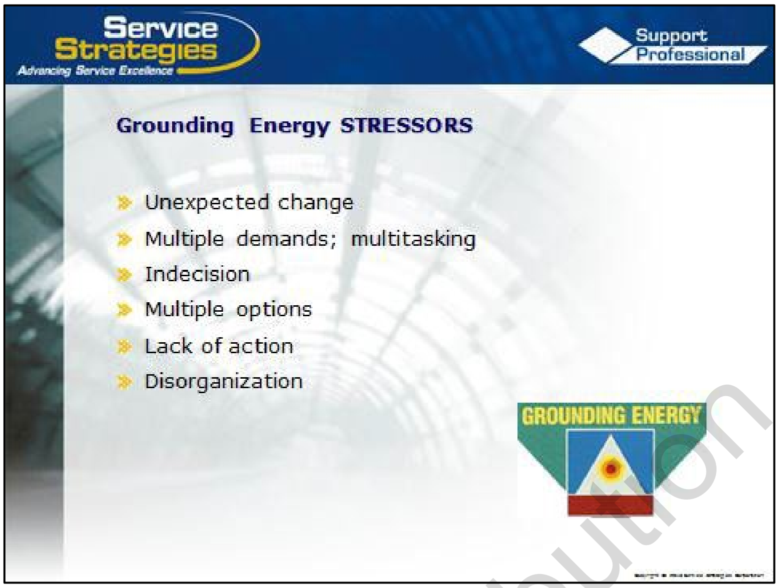
Grounding Energy Attributes/Stressors



Grounding Energy is all about the present moment. People who are highly grounded achieve full awareness as their senses function in the here and now. They pick up on the cues and clues that life provides daily.

Attributes of people who have a strong Grounding Energy are:

- They are effective in gathering information using their five senses: see, hear, touch, smell, and taste.
- They are practical and realistic.
- Learn best by doing, trying, and repeating.
- Details are important and Grounding Energy people notice and focus on them.
- Focus is on "here and now" and they are connected to the present moment.
- Predictability and perhaps even the use of a plan, exercise, or ritual.
- Grounding Energy people want to gain closure and focus on making a decision.
- They want to know the plan of action. "Where are we going and when will we be there?"

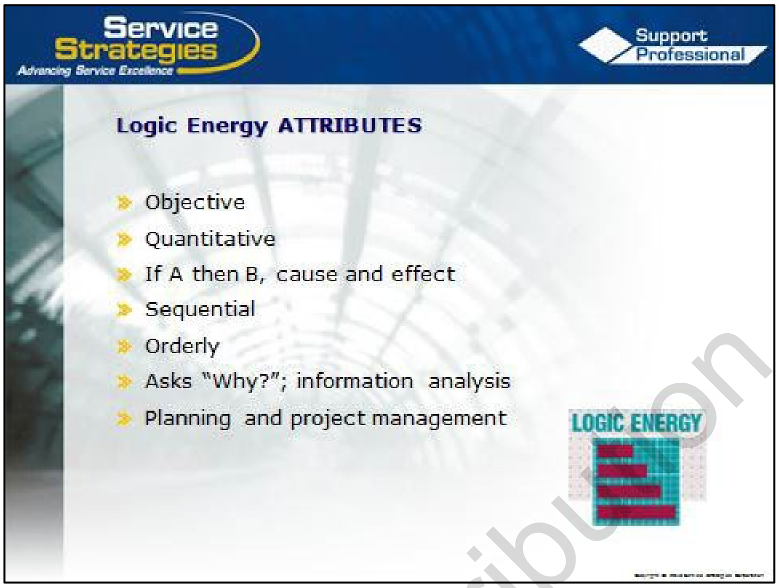


You must recognize that when your Grounding Energy style or that of your customer is stifled, stress will result and communications will be inhibited.

Factors that will create stress in a Grounding Energy person are:

- Grounding Energy people do not like unexpected change because it delays the decision and closure, i.e., when the customer says, "Oh, I forgot to tell you."
- When an issue requires a lot of different demands and multitasking, stress can result. Sounds like typical Technical Support! An approach that allows one task to be accomplished at a time is preferred.
- Grounding Energy people like to make a decision and move on, so when there is indecisiveness, stress results.
- Too many options make it difficult to gain closure and a decision.
- Grounding Energy people are very action oriented and thus a lack of progress or action is an issue.
- To some extent, like the Logic Energy in this respect, Grounding Energy people like organization and thus disorganization is stressful.

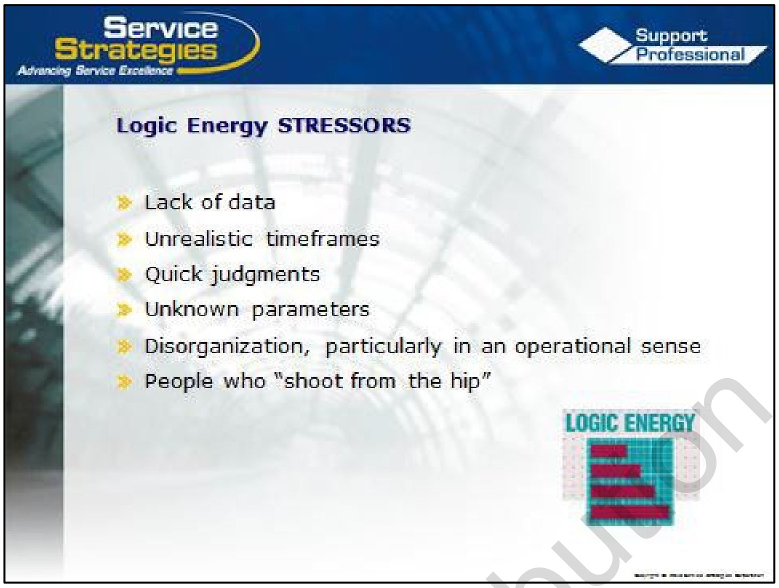
Logic Energy Attributes/Stressors



You need Logic Energy to become more clear, concise, efficient, and effective. It helps you make the best use of what you already know; it helps you understand objectively which areas you need to know more about.

Attributes of people who have a strong Logic Energy are:

- They are objective and try to avoid emotion and subjectivity.
- Logic is completely reliant on a sufficient quantity of accurate and relevant information.
- Their problem solving skills and "If A then B, cause and effect" analysis techniques are strong.
- They put the steps in order and are sequential in the sense of taking into account the preconditions for each step in a process.
- Orderliness and organization are important to them.
- They ask "Why?" and perform information analysis to understand the relationships between objects and information to help structure their thought processes.
- Planning and project management are important in organizing and sequencing activities.



You must recognize that when your own Logic Energy or that of the customer is stifled, stress will result and communications will be inhibited.

Factors that will create stress in a Logic Energy person are:

- Data and information are critical for logical people, and thus when the customer either withholds or doesn't have the information, it is stressful and irritating.
- Since this energy likes to do analysis in order to make a decision, if the time demands limit them, they get frustrated.
- People who "shoot from the hip" or make quick judgments without appropriate analysis are a concern.
- Since information is critical to success, "unknowns" are a deterrent and create stress.
- The lack of organization, a plan of action, or even people who don't follow the process, one step at a time, are irritating to the logical person.
- When there is no focus or even when open-ended questions are asked, to the logical person, the situation may not be as clear, concise, efficient, and effective as desired.

Relationship Energy Attributes/Stressors

Relationship Energy is the energy involved in feelings, emotions, values, commitment, communication, friendship, and love. Through relationships you learn to handle and re-direct stress more effectively. Relationships make you feel connected to life through others, and that's extremely important since you are often required to work and interact with others to do things that you couldn't do alone.

Attributes of people who have a strong Relationship Energy are:

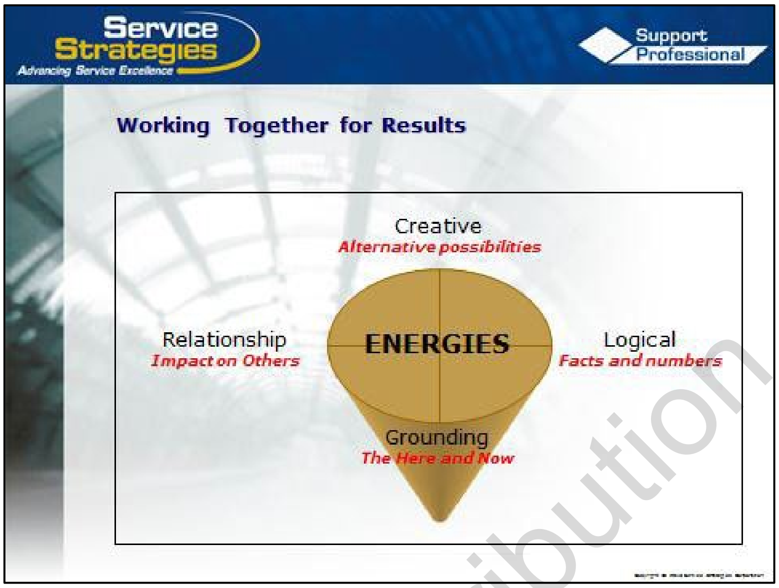
- They are sensitive to the impact of actions on other people.
- Relationship directed people are empathetic and appreciate how others feel.
- They make emotional decisions based upon how they "feel" about the matter.
- Because they rely on their relationships and past experiences they have developed strong likes and dislikes.
- Events and past experiences are more important than time. It is circular in the sense that there is no beginning or end, and they respond more to repeating patterns like the seasons of the year.
- They are good listeners and value caring and togetherness.
- They are the "glue" that helps keep groups together, and are good team players.

You must understand that when Relationship Energy is stifled, stress will result and communication with relationship people will be more difficult.

Factors that will create stress in a Relationship Energy person are:

- When people are insensitive or exploitive of others, the relationship person is stressed.
- Sometimes guilt results because the relationship person feels responsible for a failure that may not even be their fault. The problem is that they are very empathetic to the needs of others.
- It is difficult for relationship people to say "no," and thus, they may overextend themselves trying to please others. Receiving a "no" could cause a "break" in your business relationship.
- None of us like criticism, but information perceived as objective and factual by a logical person, may be perceived as a statement of the failure by a relationship person.
- Relationship people are caring and good listeners. When others do not listen, it creates stress for them.
- Being rejected or isolated is the worst thing that could happen to these "people persons."

Working Together for Results



You need all of the energies for a complete picture in gathering information and in making decisions. When gathering a team to work on a large project, it is valuable to have people from each energy profile working with you.

For the best results at work and even in your personal situations, it is important to understand that the best decisions are made when you have all the energy profile viewpoints represented in the decision-making process.

ACTIVITY - ENERGY PROFILES

INSTRUCTIONS:

1. Split into groups and answer the following questions according to the energy profile assigned to your group.
2. Select a spokesperson from your group to report your answers.
3. Record all answers as they are presented/discussed.

Creative:

How do you know you are talking with a Creative Energy customer? What do they say?

List two (2) ways to provide better service to a Creative Energy customer.

Grounding:

How do you know you are talking with a Grounding Energy customer? What do they say?

List two (2) ways to provide better service to a Grounding Energy customer.

Logic:

How do you know you are talking with a Logic Energy customer? What do they say?

____

____

List two (2) ways to provide better service to a Logic Energy customer.

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Relationship:

How do you know you are talking with a Relationship Energy customer? What do they say?

____

____

List two (2) ways to provide better service to a Relationship Energy customer.

____

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MODULE 3 REVIEW QUESTIONS

INSTRUCTIONS:

Match the answers to the correct energy profile.

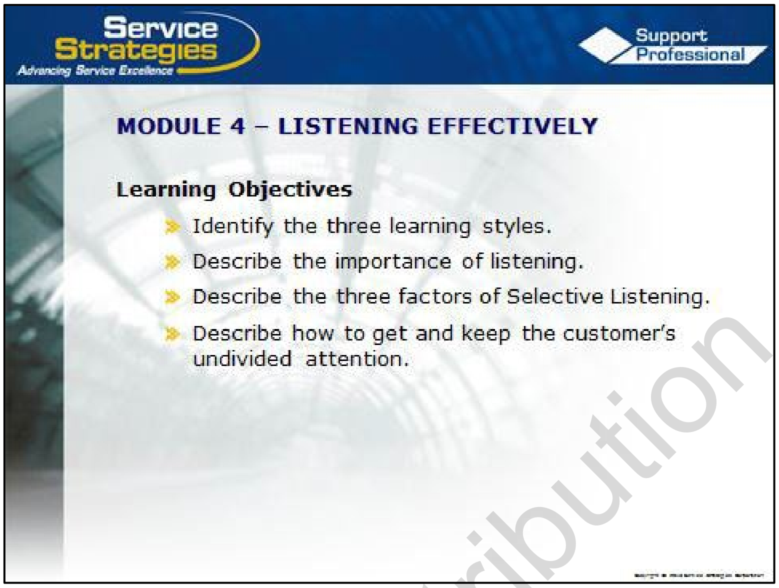
1. _____Creative Energy	a. Likes closure
2. _____Grounding Energy	b. Asks "What if?" and "Why not?"
3. _____Logic Energy	c. Sequential and orderly
4. _____Relationship Energy	d. Good team players

Answer the following True/False Questions.

5. A mismatch of energies when communicating can create stress for both parties.
    a. True
    b. False

6. A message is more likely to be accepted if you adapt to the customer's energy style.
    a. True
    b. False

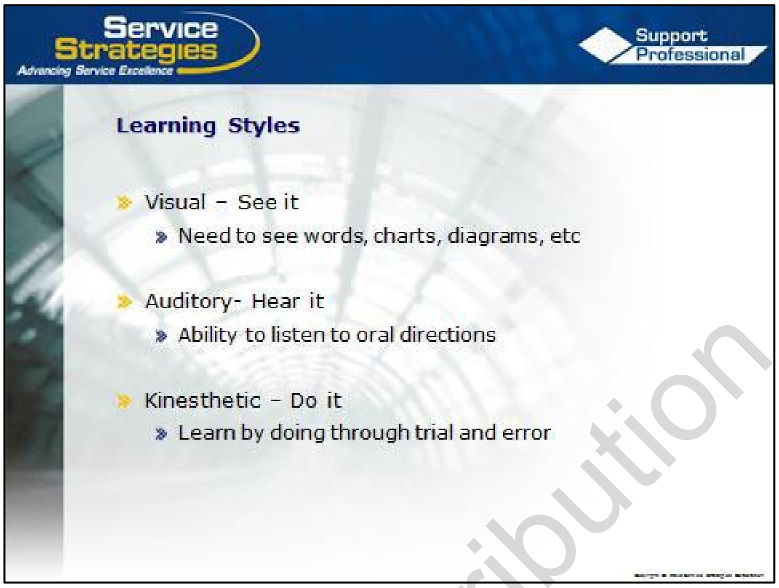
MODULE 4 – LISTENING EFFECTIVELY



Learning objectives for Module 4 - Listening Effectively:

- Identify the three learning styles.
- Describe the importance of listening.
- Describe the three factors of Selective Listening.
- Describe how to get and keep the customer's undivided attention.

Learning Styles



When communicating with your customers and peers, you need to recognize that their preferred learning style will affect their ability to comprehend the information you are providing.

There are three learning styles that are prevalent:

- **VISUAL** – Needs to see it. These learners comprehend the information best when they see it. This listener can be challenging. The speaker must create imagery and "word pictures' for them. Pointing these customers to documentation, web pages, and even sending them additional material will be helpful. Visual learner may say, "I can see that."

- **AUDITORY** – Needs to hear it. This person has the ability to listen to oral directions and follow them with little difficulty. When working with a customer on the phone, this is a good thing. The customer can comprehend the information when they hear it. Unfortunately, for many people, this is not their strongest style. Auditory learner may say, "I hear you."

- **KINESTHETIC** – Needs to do it. These learners want to "experience it" themselves in order to learn. The trial and error of this process helps them comprehend the information. Any test case/example you can provide will be helpful. Kinesthetic learner may say, "I need to get a handle on that."

Your best chance of getting the message through is to assume the customer is a visual or kinesthetic learner whenever possible. Unfortunately, the telephone lends itself to auditory learning. In order to be a more effective support professional, we need to hone our listening skills and ensure our customers are listening as well.

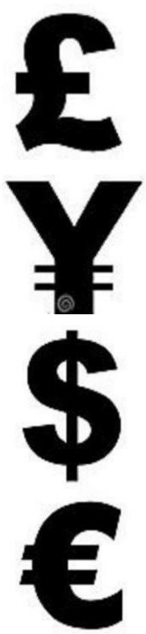
Listening is Good Business

Listening is critical to your success in every encounter with a customer and your peers. In a competitive field of customer support, the organization that listens and provides the highest quality of support to their customers will succeed over the long term.

It is interesting how well listening allows you to focus on opportunities. If you **listen effectively** and achieve a **clear, mutual understanding** with the customer, then **each stakeholder will respond appropriately** even when dealing with the most complex situations. This means that you have set expectations well, have agreement on the cause of the issue, and the expected results.

As you learn to work together over time, you will **improve cooperation** and **satisfaction** for both of you. To achieve this level of cooperation, you must **focus more on opportunities**, and **not problems or limitations**. It is important to work together towards your mutual goals and not get caught up in disagreements, poor perceptions, and dissatisfaction.

The first negative impact is that the customer will get angry. Customers that feel like you are not listening to their needs will quickly shut down effective communication. Unfortunately, it will be extremely difficult to gain back their cooperation to continue troubleshooting the problem together.



Cost of Poor Listening

Your company will pay a very high price if your customers feel the support professional is not listening to their problem. How much does a listening error cost and how many errors do you make a week?

Let’s say that a listening error costs $20 and you make two a week. Suppose there are 100 people in your organization and they all make the same number of errors at the same cost. In a year, listening errors add up to $208,000. Now add in the cost of correcting the errors and you can see a substantial amount of money affecting the bottom line.

Time IS money!

Even when companies finally address performance problems, sales do not suddenly return to normal. The loss of reputation and "good will" can continue to affect a company for years to come. (Harmon, 2004)

Reasons for Listener "Tune-Out"

Successful communications requires that both parties participate and "be in the present." Overcoming tune-out requires an awareness of some of the reasons for it, and then techniques to address these issues.

- **Fails to recognize value of message –** When the customer fails to see how the message applies to their situation or meets their needs, they will tune-out. Not only must you be aware of what the customer is seeking, you must also keep your message precise so you are speaking to their Level of Learning.
- **Is under-stimulated –** When anyone is under-stimulated or "bored" in a conversation, his or her mind may tend to wander. To counter this, you need to keep them involved by asking questions that create discussion and use your voice tone to keep the customer engaged in your conversation.
- **Is over-stimulated –** Listeners are over-stimulated when terminology goes beyond their understanding or the conversation becomes emotional. Have you ever been in a situation where someone says something you disagree with? You may find yourself thinking of rebuttals or questions to ask rather than listening to what they are saying. You are tuning out. Your customers do the same thing.

- **Can't track the pace and delivery –** A common cause of listener tune-out is communicating with someone with a different primary language. Heavy accents or language barriers can be both over-stimulating and also affect the listener's ability to understand the message. Talking too fast will cause the customer to stop listening because they cannot keep up and will eventually stop trying. Talking too slow may bore your customer and they will start focusing on something more interesting.
- **Lacks listening skills –** Many of you have never had any in-depth training in listening. You have spent a lot of time learning to read and write and even to speak in front of a group, but very little time has been spent on formal education around listening skills.

It is your professional responsibility to ensure that your customer is staying in-tune to your communications. Tune-out costs your organization in both time and money and results in dissatisfaction, frustration, and errors when the customer tries to apply the incorrect information they have received during the call.

Always be aware that you may tune-out for some of the same reasons as your customers. You may actually find yourself solving the wrong problem due to your own tune-out or have to call the customer back to get the information again. It is important that both you and your customer stay engaged.

Three Factors of Selective Listening

You are bombarded with thousands of messages every day. You couldn't possibly put concentration and energy into all of them, so you become selective as to what catches your attention and even more selective about those messages you invest additional energy to understand and remember.

There are three factors that influence your ability to listen effectively.

The first factor is **Selective Attention**. You make important choices on what and where you will focus your attention. For example, have you ever tried to watch television, read, and listen to someone talking to you at the same time? How about listening to a customer as well as someone else in a nearby office at the same time? You just can't do it, so your attention is diluted.

The second factor is **Selective Interpretation**, which means, you selectively interpret what you hear. You may not catch the emphasis on certain words in the message resulting in miscommunication and a lack of understanding about the meaning of the message. At this point, you can only interpret the message based on your limited understanding and previous experiences. Be careful using past experience because it can be a disadvantage if you use it to jump to conclusions before getting all of the information or when you make assumptions about the message.

The third factor is **Selective Retention** where you selectively retain the information you receive from other people. You tend to remember the last things you heard rather than the first and you tend to focus on details rather than general information. You hear it all, but decide what portion of the message is important to retain; the other information is lost. Hopefully, when you hang up the phone, you have recorded the critical information you will need for your research.

Missing critical information because of misunderstandings or assumptions often results in incorrect troubleshooting and problem diagnosis. This often leads to a dead-end or false solution resulting in wasted time for you and increased downtime for your customer.

ACTIVITY – SELECTIVE LISTENING

Selective Attention Activity

Listen carefully to the audio clip. What do you hear?

Selective Interpretation Activity

Remove six letters and what remains is a common word.

S I B A X N L A E T N A T E S R S

Selective Retention Activity

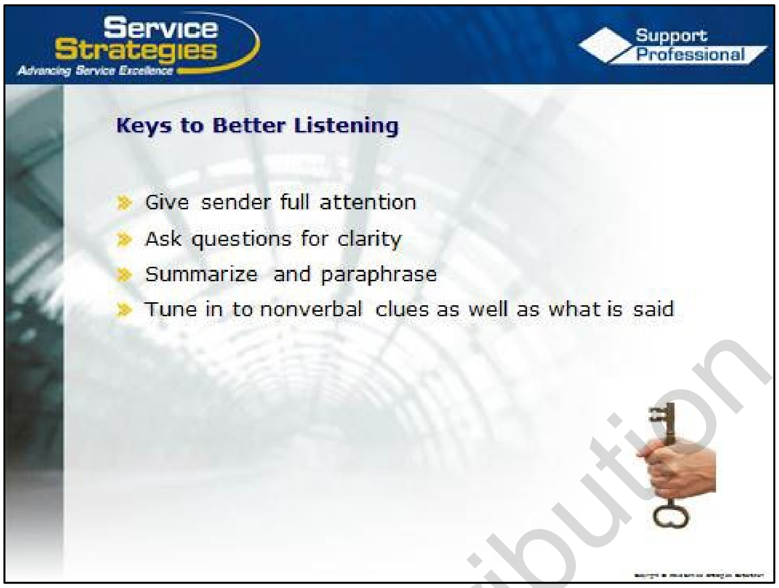
Listen to the story of the Kansas school bus driver. Do not take notes, just listen. When finished, your instructor will ask you some questions to see if you remember what was said.

Read the following questions. Are you guilty of any of these?

1. Are you reviewing or writing email while talking on the phone?
2. Are you trying to hear a conversation in an adjoining office while the customer is speaking?
3. Do you stop listening when you think you know what the answer is?
4. Do you stop listening when you THINK the information is unimportant?

The following sections will teach you how to overcome these bad habits and become a better listener.

Keys to Better Listening



You must constantly work to stay connected with customers by not only managing your communications **to** them, but just as importantly, managing the communications **from** them. This is critical not only for establishing and maintaining successful communication, but also for creating positive customer perceptions.

Let's go through the keys to better listening:

Giving the sender your full attention can be a challenge. Here are a few ideas to keep you focused:

- Be open to their input. When you are closed-minded, you stop listening.
- Manage distractions around you. This might include emails you want to browse, conversations around you, papers on your desk, social media etc.
- Consciously think about listening and focus on the message. Taking notes will help you stay focused and ensure you receive and retain the information.
- Be aware of triggers that tend to distract you when your customer speaks. Be careful not to prejudge or assume you know what the customer is going to say next.
- Increase your attention span. This can be achieved by stretching your legs and arms, closing your eyes for 10 seconds, and taking some deep breaths.

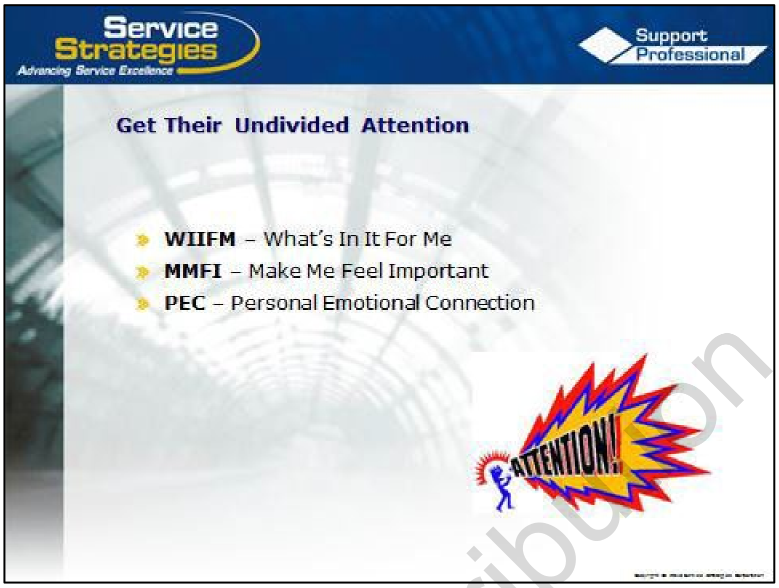
Asking questions not only helps to identify problems but also **helps you gain clarity** about the message being sent. There will be discussion later on this topic, but recognize that questions help you listen better and they also show the customer that you are not only understanding their message but are interested in learning more.

Summarizing and paraphrasing are powerful listening tools. They not only demonstrate to the customer that you are listening, they also check for understanding and accuracy. You can either restate the customer's key points (summarize) or rephrase what the customer said in your own words (paraphrase). Both techniques will ensure you are listening and tell the customer you are focused on their issue.

Tune in to nonverbal clues as well as what is being said. Puzzled comments (e.g., oh?), too much silence, or responses that are wrong, are all indicators of failure in communication. Before you continue your discussion, you must adjust to your customer's needs.

If you find your customer does not understand your message, you may need to rephrase your explanation in a different way. If your customer has tuned-out, you need to bring them back into the conversation and get them re-focused.

Get Their Undivided Attention



If you are going to communicate successfully with customers, it is necessary for you to capture and retain their undivided attention. This is not easy and requires you to constantly consider attention-holding strategies.

"What's In It For Me" (WIIFM)
Your customer's attention span is based upon their evaluation of whether the information you are providing is relevant to their needs. If you talk "over their heads" giving them information that they don't understand, or give them basic information that has no value, they will "tune-out." Have you ever had the experience when you were speaking with a friend or an acquaintance and another person or situation suddenly distracted them? Whatever you were talking about was of little interest to them and they were "gone." You must constantly be on the alert to your customer's interests and participation.

<u>Some tips on achieving WIIFM:</u>

- Always stress the customer benefits of the solution, or the action plan.
- Use descriptive words such as warranty, results, proven.
- Use action words such as create, build, and gain.
- Tell the customer exactly what you can do FOR them. For example, instead of listing your product's features, explain what the features can do for them, e.g. how the features can make their business or process better.

"Make Me Feel Important" (MMFI)
Most people won't remember what you said to them at any given moment but they will always remember the way you made them feel.

If you are perceived as incompetent, or are sending your message in a painful or uncaring manner, the message tends NOT to be received. This is why your voice tone is so important when communicating on the phone. It relays your confidence and thus your perceived competence, and it relays your attitude about the customer and the situation they are encountering. When the message is sent with an uncaring attitude, the MMFI filters will absolutely affect your customer’s perception of you and your company.

How can you make your customer feel important?

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“Personal Emotional Connection” (PEC)
Emotions drive people's decisions and behavior. When you meet someone for the first time, you usually try to find something in common; something that ‘connects’ you to establish a Personal Emotional Connection (PEC) with that person. You can take this into the workplace as well. Establishing a PEC with your customers can help strengthen your working relationship and will lead to a greater value over time.

It only makes business sense to listen carefully when your customer offers any personal details you can build a connection upon. For example, when the customer tells you that they will be on vacation for the next week, that information could lead to a conversation about their vacation plans. These types of conversations lead to establishing a PEC with your customers.

If you want your customers to realize how great your company is compared to your competition, you must properly connect with them. By maintaining a PEC, your company may be able to retain even more of your customers that will result in greater profit. Quite simply, engaging customers will keep them coming back to your company for more support. (Hamilton, 2012)

ACTIVITY – PERSONAL EMOTIONAL CONNECTION

Read the statements below and write a response that is likely to produce a positive PEC between you and your customer but still maintain a professional distance.

Customer Statements:

"I need to leave on time today to pick up my car from the repair shop."

____

"I have a very bad cold so I hope you can understand me."

____

"I will be on vacation/holiday for a week so I would like to finish this report today."

____

MODULE 4 REVIEW QUESTIONS

1. What are the three factors of Selective Listening?
   a. Selective Attention, Selective Interpretation, and Selective Retention
   b. Selective Awareness, Selective Intermission, and Selective Memory
   c. Selective Attention, Selective Interruption, and Selective Memory

2. One of the keys to better listening is:
   a. Creating an action plan
   b. Summarizing or paraphrasing what the customer said
   c. Multi-tasking

3. What is one of the strategies you can use to get a customer's undivided attention?
   a. Let the customer know what's in it for them
   b. Make the customer feel important
   c. Both a and b

4. Which of the following is a reason for listener "tune-out?"
   a. Thinks message is important
   b. Lacks financial incentive
   c. Lacks listening skills

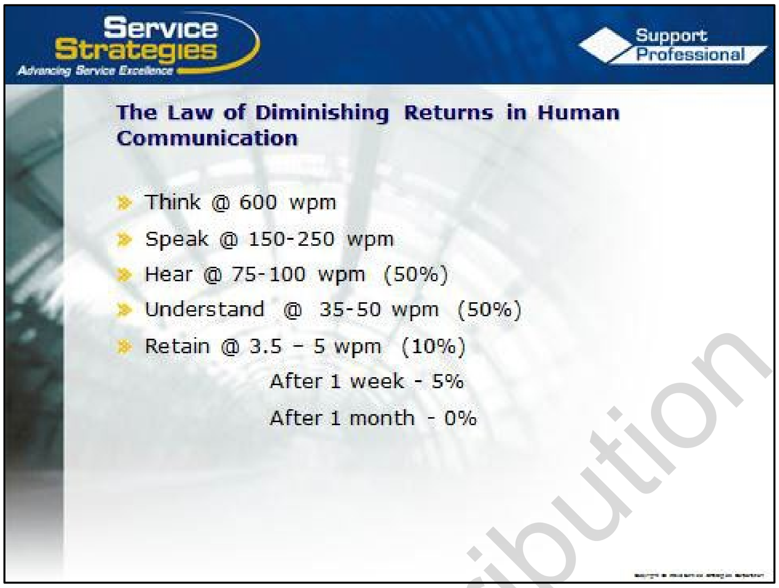
5. Making your customer feel important will affect their perception of your company.
   a. True
   b. False

MODULE 5 – MAKING COMMUNICATIONS SUCCESSFUL

Learning Objectives for Module 5 – Making Communications Successful:

- Describe the "Law of Diminishing Returns" in human communication.
- Describe the realities and barriers associated with effective communication.
- Identify and use the rules of cross cultural communications.
- Provide a response to customer questions that are truthful but not too transparent.

Diminishing Returns in Human Communication



The “Law of Diminishing Returns” shows communication challenges you face. You must help the customer hear, understand and retain the information you provide. You must also overcome your own “diminishing returns” when communicating.

How can we overcome the effects associated with the Laws of Diminishing Returns?

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Overcoming the obstacles to communication as expressed in this “law” is critical to your success. It is your responsibility to take steps to ensure that communications are effective.

Thinking Fast

There has been years of study of how humans "think." In a book titled "*Thinking Fast and Slow*" by Daniel Kaheman, he explores the two systems that characterize our thinking and how they affect how we interact with the world, make decisions and process information.

<ins>The two systems are:</ins>

- **System 1** – Operates *automatically* and quickly, with little or no effort and no sense of voluntary control. System 1 helps us survive and is constantly learning and adjusting its references or *associative memory*.
- **System 2** – Allocates attention to the *effortful* mental activities that demand it, including complex calculations or associations. System 2 is associated with the subjective experience, choice and concentration.

We are designed to jump to conclusions. System 1 is quick to offer a solution that appears *similar* to other situations, often without probing. This is when we need to use System 2 thinking by slowing down and confirming the problem before we offer a solution.

ACTIVITY – THINKING FAST

Read each of the following and quickly solve the puzzle.

A bat and a ball cost $1.10
The bat costs $1.00 more than the ball.
How much does the ball cost?

ANSWER: ________________________

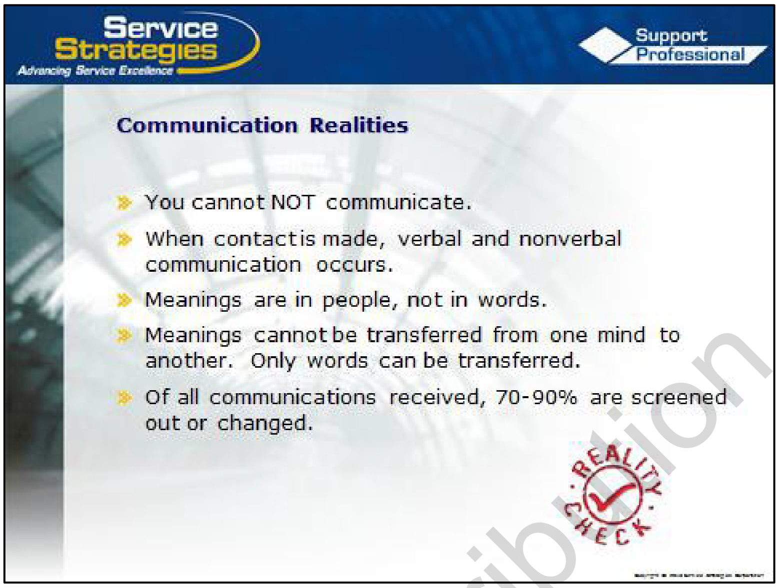
If it takes 5 machines 5 minutes to create 5 widgets, how long would it take 100 machines to make 100 widgets?

ANSWER: _________________________

In a lake there is a patch of lily pads. Every day, the patch doubles in size. If it takes 48 days for the patch to cover the entire lake, how long would it take for the patch to cover half the lake?

ANSWER: _________________________

Communication Realities



Communication realities are a fact of life. Recognizing that these are occurring is the first stage of overcoming the barriers to communication.

You cannot NOT communicate – Even when you are not saying anything, you are still communicating through your body language and even by the way you are dressed. In a telephone conversation, too much silence, without any verbal attends, is often communicating that the person on the other end is doing something else and not listening.

When contact is made, verbal and nonverbal communication occurs – When you first come into contact with a customer or a peer, whether it is in person or on the phone, your 'mind chatter' starts to kick in giving you messages about the other person. For example, you may be evaluating their voice or their attitude. You begin to develop perceptions about the other person which affects the quality of communications you have with them.

Meanings are in people, not in words – Words alone are only a part of the message since non-verbal cues and your tone are all part of the message. Your customers have a style, personality, and attitude that often will tell you more about the message than their actual words do.

Meanings cannot be transferred from one mind to another. Only words can be transferred – Only the words are actually transferred, but the meanings come from other sources such as tone of voice and body language.

Of all communications received, 70-90% are screened out or changed – How do you screen out irrelevant messages? You relate and interpret what you hear to your own values, experiences, and perspectives. You don't remember it all. What you hear triggers your thoughts so you can lose focus with the sender. Have you ever played the game where a message is passed from one person to another around the room? At the end of the line, the message is totally different from the one that started with the first person. Slight changes with each transfer cause the message to be totally different when it reaches the last person.

How Are Messages Received?

People communicate through words, voice tone and body language. You need to recognize how messages are received in order to leverage your communications.

ACTIVITY – HOW ARE MESSAGES RECEIVED

Instructions:

Under the "My Estimate" column for both In-Person and Via Telephone, fill in what percentage each of these communication factors contribute to how your message is received. Each column needs to add up to 100%.
Note: Assume the words you use are the correct words.

	In-Person		Via Telephone	
	My Estimate	Actual	My Estimate	Actual
Words	_______%	_______%	_______%	_______%
Voice Tone	_______%	_______%	_______%	_______%
Body Language	_______%	_______%	_______%	_______%

These percentages reflect general communications. When giving the customers technical information, the words will certainly take on a greater role.

How do you think words, voice tone and body language affect messages received through electronic communications?

____

____

____

Improper Voice Tones

Sometimes it is not what you say, but how you say it, that conveys the message.

<u>Avoid the following voice tones that can have a negative impact in your communications when speaking with customers:</u>

- **Apathy** – Slow speech with no inflection indicates lack of interest to the listener. Bored customers will not listen attentively as they should and can often overlook key information that they will need to resolve their particular issue.
- **Rushed** – Fast speech indicates that the speaker is nervous, disorganized, out of control, or more interested in moving on to another task. Slow your rate down when speaking about important points to allow the customer time to understand and retain important information.
- **Irritation** – Sounding irritated indicates lack of respect for the listener, impatience, or can be considered condescending.
- **Phoniness** – A phony voice tone indicates insincerity and loss of credibility.
- **Hesitancy** – Being hesitant in your speech indicates indecisiveness, lack of confidence, and a possible lack of competence.

Voice tone says as much about the speaker's intent as the words themselves. Using the proper voice tone demonstrates that you have confidence in your skills as a support professional.

Communication Success Indicators

The effective communicator looks for signs from the listener that the message is being understood, and if it is not, adjusts the message or communication style. Effective communication happens when the receiver responds as you intended.

<u>What are the signs of communication SUCCESS?</u>

- On the phone, the listener sends verbal signals that indicate the communication was received successfully. This may involve a simple one or two word acknowledgement in the form of verbal attends (e.g., oh yes, ahh, ok!), correct paraphrasing, or asking new questions based on the conversation. Also, tone, pace, and delivery of the receiver suggests the success of the communication.

- When in person, positive body language such as eye contact, appropriate gestures, and good posture are communication success indicators.

<u>What are the signs of communication FAILURE?</u>

- Listen for negative verbal attends (e.g., ugh, oh no!), silence, and incorrect responses to inquiries.

You must be sensitive to the success of your communications. This is part of keeping the customer in the "zone" of support and you must use these feedback indicators to adjust to the needs of your customers.

ACTIVITY – GOOD COMMUNICATOR

Instructions:

1. Select a volunteer to go to the front of the classroom. They are the 'customer.'
2. The customer is given a picture of a drawing which cannot be shown to the rest of the class.
3. The customer will explain the drawing, in words only, and it's the student's responsibility to draw the picture in their workbook (next page) EXACTLY how the customer describes it.
4. The class may ask questions to better understand the customer.

Follow-up questions:

What happened with this communication? Was it successful? Why or why not?

____

____

What frustrations or difficulties did you experience? Did you get frustrated to the point of not listening?

____

____

What key questions should have been asked to clarify what the customer said?

____

____

What can you do to improve communications with your customers?

____

____

Activity Work Area

Barriers to Communication

Success in communication is sometimes affected by a number of barriers. Thankfully, these obstacles can be overcome if you recognize them and make the necessary adjustments to your communications.

Previous Experience – A negative experience that a customer has had with you, or anyone else in your company, can influence the success of your communications. It could have been a bad experience with someone else in your industry or the fact that you are too technical for their Level of Learning.

Customers are predisposed with certain perceptions and expectations. They simply may not believe you. They may get angry about their unresolved issue. Perhaps the customer was given some bad information in the past. You may even notice a reluctance to work with you or to accept your research findings. Customers are not easy to satisfy, but perceptions can be changed using the information provided in Managing Customer Perceptions.

Education – Education, and certainly a lack thereof, can be challenging for you. Lack of training in the technical field, with your products, and education in general can really hinder your communications. A highly educated person can also be a challenge. You must be flexible when communicating. It is your responsibility to make communications successful with **all** your customers.

Human Factors – This may be one of the most challenging barriers to overcome. Human factors include emotional customers, those having a bad day, and deadlines.

What other Human Factors can be barriers to communications?

____

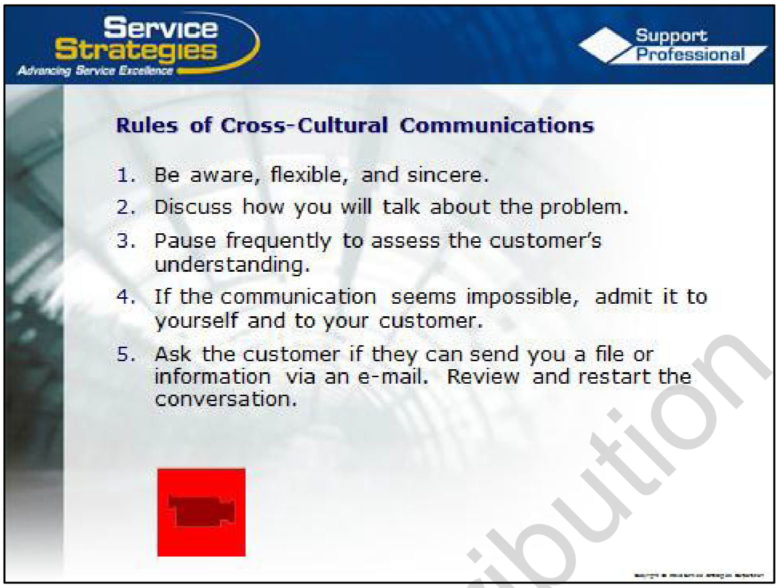
____

Language/Cultural - If their background barrier is language or cultural, there may be serious difficulties in communicating with them. We will discuss this in cross-cultural communications later in this module.

Transparency – Being transparent allows your customer to see too far into your organization, therefore ruining your credibility. We will go into further detail about transparency later in this module.

You should expect barriers to come up during conversations and the only way to be successful is to be constantly alert and ready to adapt to the situation.

Cross-Cultural Communication



One of the biggest challenges facing technical support staff is the global nature of support and the necessity of speaking with people from all over the world with various language preferences. You may frequently find yourself frustrated, irritated, stressed, and self-conscious when these conversations take place. Feeling this way is normal! So what do you do?

Rules for handling cross-cultural communication issues:

1. Be conscious of the fact that you are feeling uncomfortable with the other person's accent and remember that they are probably feeling the same way. This is AWARENESS.
    a. Resolve that you will be FLEXIBLE and SINCERE in dealing with this situation.
    b. Recognize that communication is ultimately a problem between individuals and you should take nothing for granted as you discuss their problem.

2. Discuss how you will talk about the problem.
    a. Tell the customer to let you know if you are speaking too fast or using idioms that only you understand.
    b. Decide together what you will do if one or both of you don't understand the other.

3. Pause frequently to assess if the customer understands you.

4. If the language barrier is insurmountable, admit it to yourself and then to your customer.

5. Be polite, stay positive, and ask the customer if they can send you an email. After reviewing the information, call the customer back and restart the conversation. You should find that you now have a shared context for the conversation.

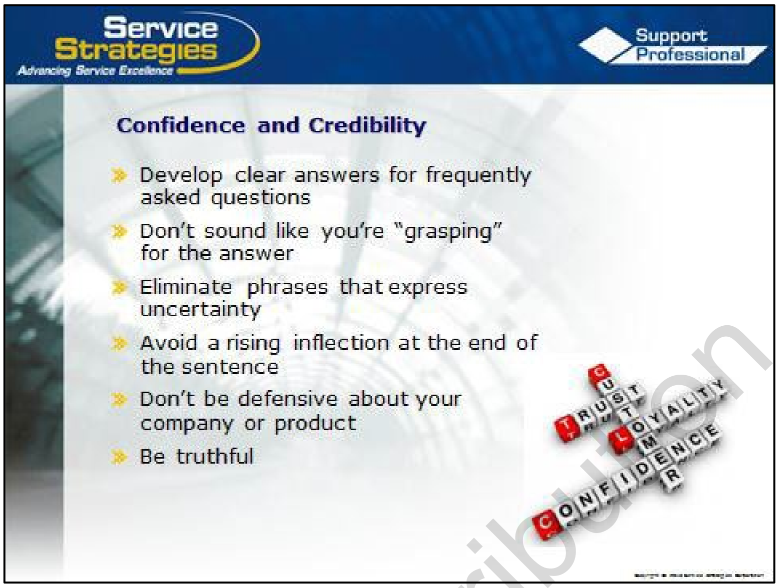
VIDEO – CROSS CULTURAL COMMUNICATION

As you watch the video clip, answer the following questions:

In the first clip, what did Valerie say to make this communication with Lois unsuccessful?

In the second clip, how did Valerie better handle the conversation?

Confidence and Credibility

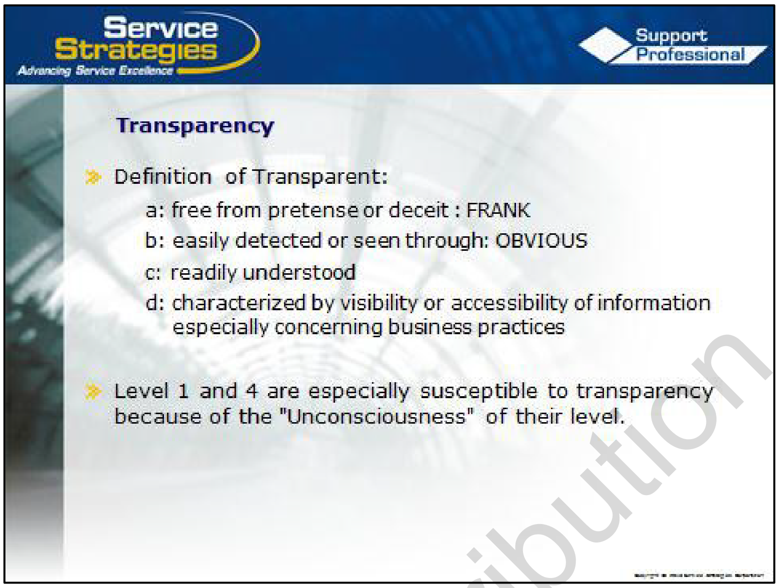


Be aware of how you answer customer questions (how confident you sound) because it contributes to or undermines your credibility.

- **Develop clear answers for frequently asked questions** - Answer clearly and succinctly at the customer's Level of Learning. Always adapt to the customer's level once you've gauged their level of expertise.
- **Don't sound like you're "grasping" for the answer -** Whenever possible, cite the documentation and work at developing clear answers for frequently asked questions.
- **Eliminate phrases that express uncertainty** – "I guess," "maybe," "you know." They indicate a lack of knowledge and confidence.
- **Avoid a rising inflection at the end of a sentence** that expresses doubt.
- **Don't be defensive about your company or product -** Sometimes the customer's criticism is unfair and you have to take the "heat." Yet, you don't need to take personal responsibility for everything your organization does.
- **Be truthful** – Being truthful keeps you on solid ground. It is also critical in maintaining the ethical position of you and your company. However, be careful not to reveal too much information or be too truthful.

The WAY you respond to the customer will affect his or her perception of your credibility.

Transparency

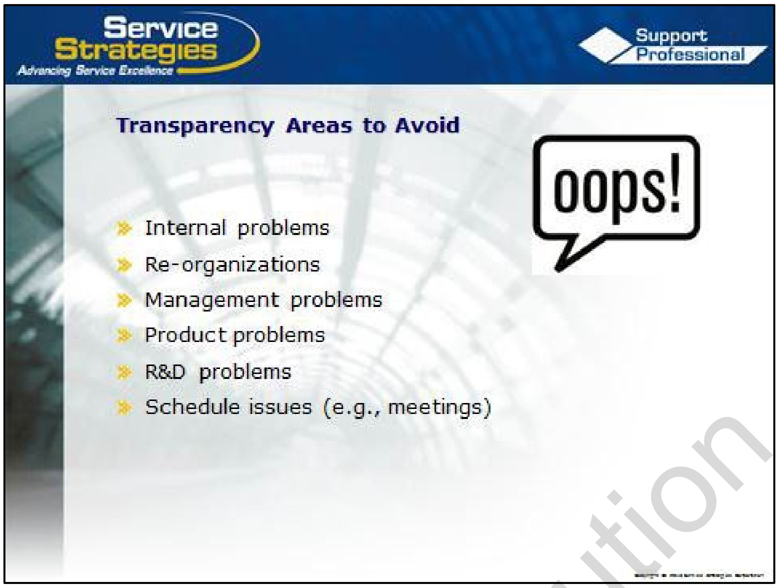


Definition of Transparent:

The following definition was obtained from the online Merriam-Webster dictionary site: (Merriam-Webster, 2013)

a: free from pretense or deceit: FRANK
b: easily detected or seen through: OBVIOUS
c: readily understood
d: characterized by visibility or accessibility of information especially concerning business practices

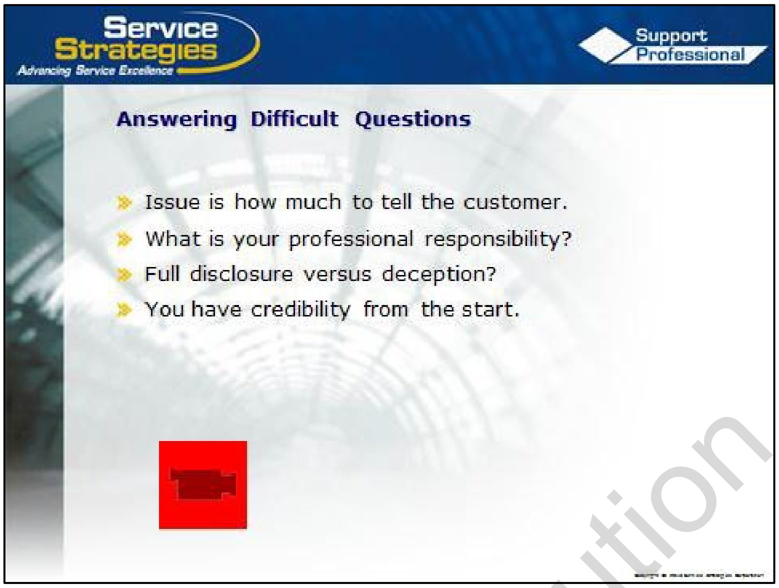
Support professionals and customers who are particularly vulnerable to transparency are Level 1 (Unconscious Incompetence) people who are new to the organization and are not completely trained and Level 4 (Unconscious Competence) people who are frustrated about their job. If you fit into either of these Levels of Learning, you should recognize that you are especially susceptible to transparency because of the 'Unconsciousness' of your level.



A support professional is too transparent when they let the customer see too far into their organization. Sometimes you may inadvertently mention to the customer something that is frustrating you at the present time. It could be in response to a direct question or it may come up during a dialogue. Expressing frustration in this way could easily affect the credibility of your organization in the customer's eyes.

Transparency areas to AVOID are as follows:

- **Internal Problems** – The procedures may not be defined or are not clear.
- **Re-organizations** – You are now on a new team and you're not happy about it.
- **Management Problems** – You and your manager are not getting along very well at the present time. Perhaps your goals are not clear or you are in disagreement over an assignment (e.g., work schedule).
- **Product Problems** – You've noticed a lot of problems with the product or are upset over the lack of testing.
- **R&D Problems** – Development or engineering is not responsive to your needs.
- **Schedule Issues (e.g., meetings)** – You are late for a meeting or are at the end of your scheduled time.



Sometimes a customer will ask you a very difficult question that puts you on the spot. It may be triggered during the conversation or may be a direct question. You are challenged by the customer and don't immediately know how you should respond. The answer is that you must determine how much you should tell the customer. You do not want to be too transparent, but on the other hand, you should not lie. Ask yourself, "What is my job?" and "What is my responsibility?"

You have credibility with the customer because of the nature of your job. Telling the truth is critical to maintain your credibility and that of your organization. Just as important as never lying to customers is avoiding too much transparency so you must find an ethical balance between the two.

VIDEO – CONFIDENCE AND CREDIBILITY

As you watch the video clip titled "Credibility Through Honesty," answer the following questions:

What things did Terry say to lose credibility with Justine?

In the second clip, how did Terry better handle the interaction?

ACTIVITY – TELLING THE TRUTH

Instructions:

For each of the seven customer statements/questions, write both a bad answer that is transparent as well as a good answer that is not transparent, but is truthful.

1. **"Why did I have to wait so long for you to answer the phone?"**

   BAD ANSWER: ______________________________

   ____

   GOOD ANSWER: ______________________________

   ____

2. **"What happened to Larry?" (***He no longer works for the company***)**

   BAD ANSWER: ______________________________

   ____

   GOOD ANSWER: ______________________________

   ____

3. **"What is the status of the fix for my problem?" (***Development has not started working on it yet and may not for a long time***)**

   BAD ANSWER: ______________________________

   ____

   GOOD ANSWER: ______________________________

   ____

4. **"Why has your next release been delayed?"**

   BAD ANSWER: ____

   ____

   GOOD ANSWER: ____

   ____

5. **The internal call tracking system is down and the customer is calling about an existing service request.**

   BAD ANSWER: ____

   ____

   GOOD ANSWER: ____

   ____

6. **You have not received training on the product for which knowledge is needed to resolve the issue.**

   BAD ANSWER: ____

   ____

   GOOD ANSWER: ____

   ____

7. **The customer insists that the salesperson misrepresented the product.**

   BAD ANSWER: ____

   ____

   GOOD ANSWER: ____

   ____

MODULE 5 REVIEW QUESTIONS

1. The “Law of Diminishing Returns” states that you:
    a. Speak faster than you think
    b. Retain more after one month
    c. Hear more than you understand

2. Which of the following communication factors is most important when talking on the phone?
    a. Words
    b. Voice Tone
    c. Body Language

3. Your voice tone can be an indication of your confidence level.
    a. True
    b. False

4. If the language barrier is insurmountable, what is the first thing you should do to get back to communicating successfully?
    a. Admit your inability to understand their message to yourself and then to your customer.
    b. Tell the customer to call back and talk to someone else because you can't understand them.
    c. Talk louder so they can understand you.

5. Which Levels of Learning are most susceptible to transparency?
    a. Level 1 and 4
    b. Level 2 and 3
    c. Level 3 and 4

MODULE 6 – COMMUNICATION METHODS

Learning Objectives for Module 6 – Communication Methods:

- Explain techniques on first impressions, positive telephone communications and customer rapport.
- Describe the steps for transfers and placing a customer on hold.
- Describe engagement techniques to use to manage talk time.
- List the guidelines to follow when leaving a voicemail.
- Describe professionalism as it relates to online communication.
- Identify the "8 Steps to Responding" to an email.
- Explain the importance of online case documentation and its components.

Telephone Communications

In telephone communications, **first impressions count**! Make it a positive one because the customer will take their first impressions and convert them to perceptions in a very short period of time. Refer back to the module on Managing Customer Perceptions for a detailed discussion about expectations and perceptions.

Pick up the phone as soon as possible! Response time is critical. It is the number one customer complaint concerning Technical Support.

Consider **greeting the caller** using some of the following phrases:

- "Good morning" or "good afternoon"
- "Thank you for calling"
- Identify your company, department, and yourself
- "How can I help you?"
- "What is your case number?"
- "Is this a new or existing issue?"

Note: Don't make your greeting too short or too long.

Also, make sure that your voicemail greeting is current. When is the last time you listened to your voicemail greeting? Few issues irritate the customer more than an out-of-date voicemail greeting.

Atmosphere of Positive Telephone Communication

The caller needs to feel that the support professional is able to take control of the problem and get it resolved to their complete satisfaction.

<u>Follow the techniques below to ensure a positive telephone experience:</u>

- **Why before what** – Give the listener the 'Why' behind your message before the 'What.' For example, "I need to understand the problem. Please describe what happened when you shut down the system."

- **Show empathy** – Demonstrate awareness of your communication from your customer's perspective by tailoring your message. Try saying something like "I understand you need to get that fixed right away" to show the customer you care about their problem.

- **Use concrete language** – Be direct, concise, and descriptive.

- **Take responsibility for the message** – Even if you are not responsible for working the issue, speak to what you CAN do to resolve it. Never appear to be a victim of anything, including product bugs, reorganization, or other people's mistakes.

- **Use words that relieve tension** – In tense situations, be less direct and encourage participation like in the following examples:
  - "Let's talk about it"
  - "Together we are going to solve this problem"

Customer Rapport

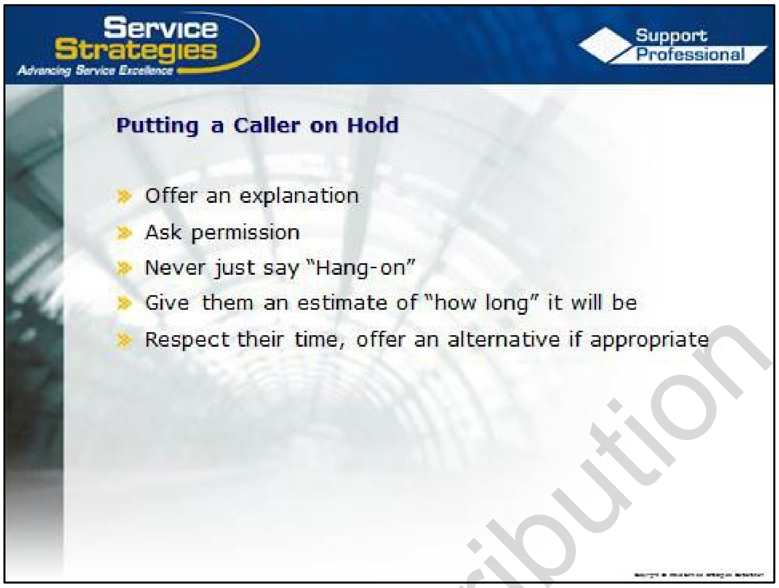
According to Wikipedia, rapport occurs when two or more people feel that they are *in sync* or *on the same wavelength* because they feel similar or relate well to each other.

Rapport with your customer can change from positive and cooperative to angry and closed just because of one poorly chosen word or phrase.

The following will DAMAGE the rapport you have with your customer:

- **Negativity** – Use positive words and direction.
- **Don't dominate the conversation** – Allow the customer to complete sentences and thoughts. Dominate only when the situation calls for it.
- **Political issues, emotional trigger words, and phrases** – Stay away from gender or racial specific terms such as "Sweetheart" or "Honey."
- **Condescending style –** Talking down to your customer because they do not know as much as you on the topic can damage rapport. This is typical of a Level 4 (Unconscious Competence).
- **Embarrassing questions or statements** – Asking questions like "How could you do that?" will only embarrass your customer potentially causing additional problems.
- **Jargon and acronyms** – Using field specific jargon and acronyms unknown to your customer may also cause a barrier to communication. Clarify any jargon or acronyms to ensure they understand you.

Holds and Transfers



While it may seem simple enough to place your customer on hold, there are certain guidelines that should be followed to prevent feelings of abandonment when the hold music starts.

The following guidelines will help you place your customers on hold without creating negative feelings:

- **Offer an explanation** – Inform the customer the reason they are being put on hold.
- **Ask permission** – Get a verbal agreement that being put on hold is acceptable.
- **Never say "hang on"** – Ask the caller if they can wait or hold.
- **Estimate hold time** – Provide your customer with your best estimate of how long they will be on hold.
- **Respect their time by offering an alternative, if appropriate** – If hold time becomes excessive, ask the customer if you can call them back when you are ready to continue working.

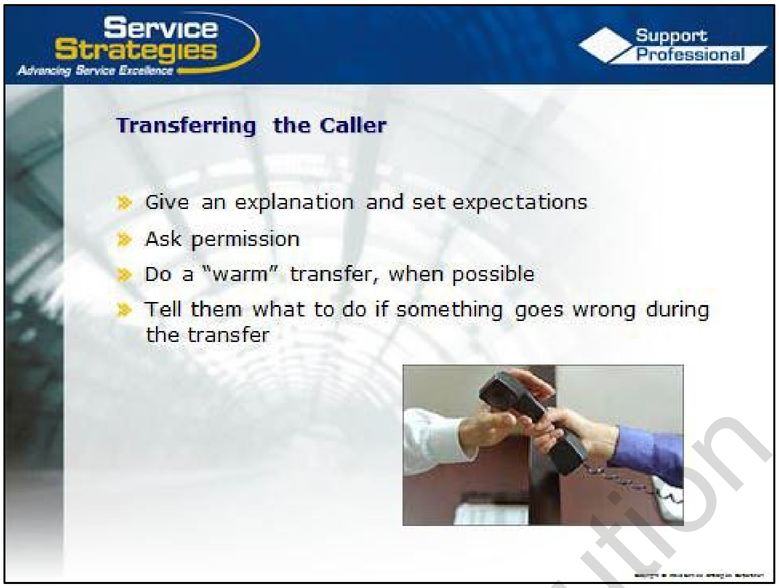
Table 1: Impact of Hold Time

Actual Hold Time	"Feels Like Index"
1 min.	1 min.
2 mins.	3 mins.
3 mins.	5 mins.
4 mins.	9 mins.
5 mins.	15 mins.
10 mins.	30 mins!

Survey results courtesy of Prognostics.

Prognostics conducted a survey that yields surprising results. Interestingly, the longer people wait on hold, the greater the time gap between the "Actual Hold Time" and the "Feels Like Index" as shown in Table 1. The results from the survey clearly show that after only five minutes on hold, the customer feels like they have been on hold for 15 minutes! That is three times more than the actual hold time.

By following the guidelines to putting a caller on hold, you will close the gap between "Actual Hold Time" and the "Feels Like Index."



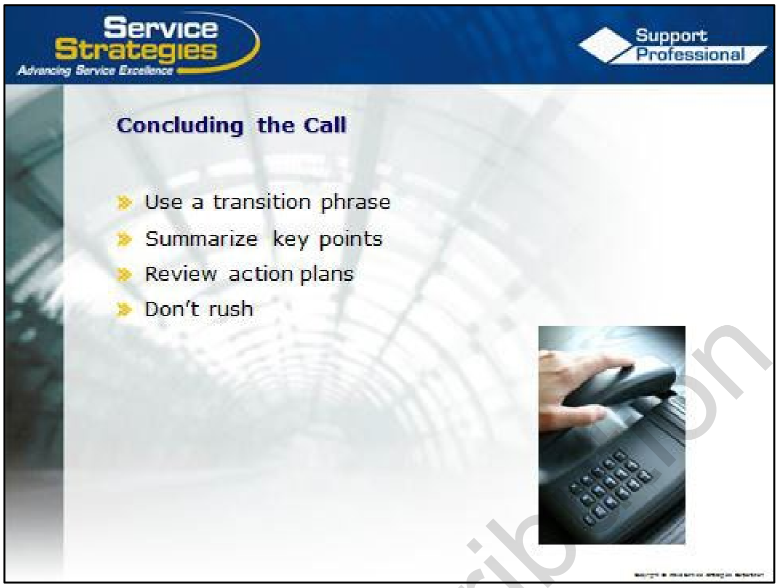
Transferring a call is more than just pushing a few buttons and sending the customer to someone else.

<u>There are vital steps that must be followed in order to ensure the customer has a smooth transfer.</u>

- **Explain the reason for the transfer** – Explain the need to transfer to the other person in order to better serve their needs.
- **Ask permission** – Get a verbal agreement that being transferred is acceptable.
- **Warm transfer** – Whenever possible, do a 'warm' transfer, i.e. check first to ensure someone is available to take the call. If not, discuss alternatives with the customer.
- **Contact information** – Provide a phone number or extension of the transfer party in the event the call gets disconnected.
- **Say "thank you"**

It is important to provide choices when transferring a customer. This gives the caller a sense of control. For example, if the person is not available, ask the customer if they would like to leave a voicemail. This gives the caller a sense of control.

Concluding the Call



A well-structured conclusion leaves the caller feeling secure and that the person they dealt with is professional and competent.

Use the following strategies to ensure a professional conclusion:

- **Use a transition phrase** – "Have we addressed everything with this issue?" or "Do you have any more questions regarding this ticket?"
- **Summarize** – Summarize the key points of your conversation.
- **Review action plans** – Review yours and the customer's action plan(s).
- **Don't rush** – Allow the caller to hang up first.

Call conclusion enables you to verify that all issues have been discussed and all plans are understood and agreed upon.

When the Customer Doesn't Want to Let Go

Have you ever provided support to a customer who will not hang up? Maybe it is a familiar customer and they want to engage in small talk. Or maybe it is a customer who doesn't feel comfortable with the solution you have offered or is afraid to lose live support. How have you handled these calls in the past?

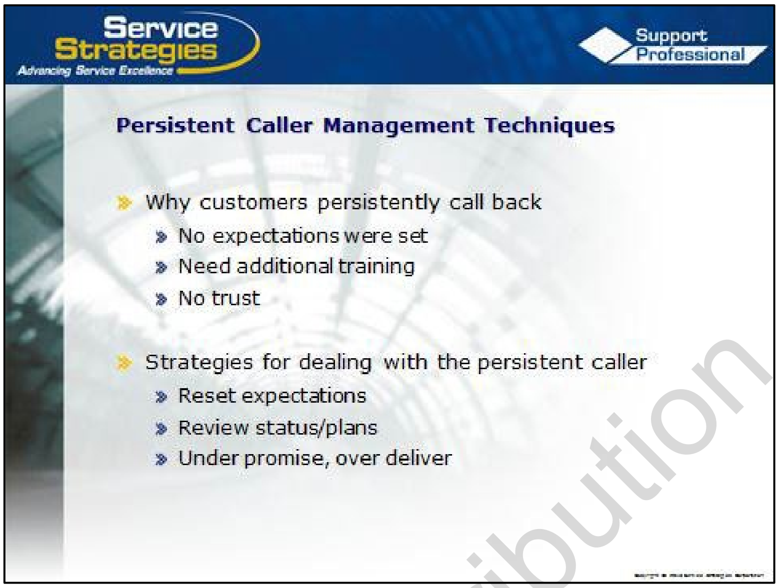
You should **disengage from the customer when no further progress can be made** on the phone.

Terminating the call may require you to use certain techniques to convey the message that the call has reached its end and that no further discussion is needed on the issue. You can **reach closure by asking closed questions** such as "When do you think you'll have the log files available?" or "Is there anyone else who needs to review this?"

If the call has generated action items, **reiterate the action steps** so you both understand what is needed to be done after the call concludes. **Use past tense** phrases such as "We said we would…" and "We addressed all the issues…"

Be sure to **set your customer's expectations again** by reviewing your action plan before you end the call to prevent any misunderstandings. If you say that you will deliver a solution to the customer by 4:00pm, you better meet that deadline. Failure to follow-through on a promise will affect your credibility going forward. Remember, **"plan what to do; do what you plan."**

Persistent Caller Management Techniques



The persistent caller can be annoying and difficult to handle. Persistent callers are people who call three or four times per day, and tend to ask the same questions over and over again.

<u>Customers persistently call back because of the following reasons:</u>

- **No expectations were set** – An action plan was not discussed or agreed upon. Are they supposed to be getting logs? When were you going to follow up etc?
- **They need training or didn't understand something** – Maybe the instructions weren't clear or not at their Level of Learning.
- **There was no trust** - You did not do what you said you were going to do, (i.e., call them back at the agreed upon time).

<u>Some strategies for dealing with the persistent caller include:</u>

- Reset expectations
- Review status and plans
- Under promise / over deliver when possible

Voice Messaging

When you call your customer, you may likely need to leave a voicemail message.

Keep these goals in mind when leaving a voice mail:

- **The voice message will be listened to** – Know what you want to say before you call the customer. State your name and purpose of your call at the beginning of the message and in as few words as possible. Your message will most likely be listened to if it starts out properly.

- **It will be understood** – Ensure that your message has a logical flow in addition to being accurate, brief, and clear. For example, when leaving a phone number, annunciate and repeat the number to ensure it is understood.

- **Will not annoy** – Again, know what you want to say. You can damage your rapport and sound less confident if you are stumbling on your words or leaving a confusing message.

- **Doesn't take too much time to listen to** – Respect the receiver's time by keeping the message brief. A recommended length for voicemail messages is 30 seconds or less.

ACTIVITY – TELEPHONE COMMUNICATION

Instructions:

1. Read the SCENARIO given to you by your instructor.

2. What problems do you anticipate?

3. How can the support professional best handle the situation?

Types of Online Communication

The processes of electronic-based communication follow the same standard steps of resolution as phone support: getting the request to the right person, setting customer expectations, and keeping the customer informed.

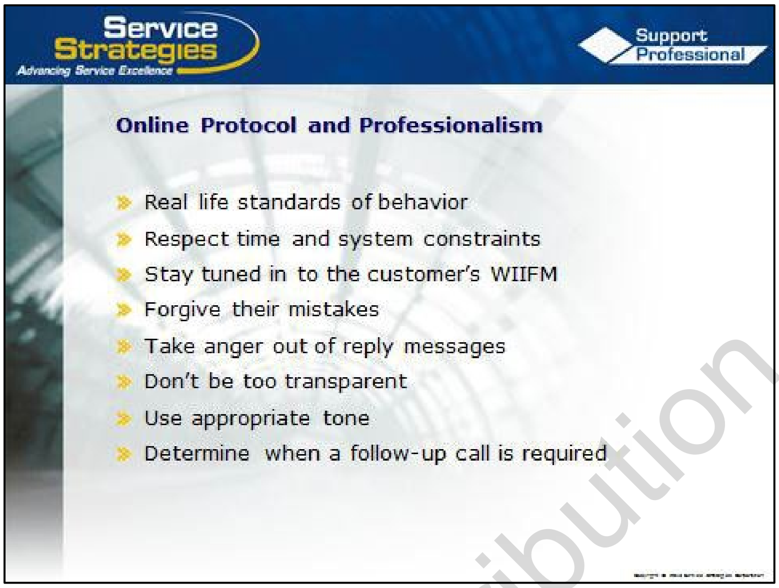
Types of online or electronic-based technology used in our job include:

- Email
- Chat
- Online case documentation
- ____

However, the technology is different and has its own unique set of rules, etiquette, and challenges such as:

- When should you use informal writing vs. formal writing?
- How should you present yourself on IM?
- What processes does your organization have regarding Chat/IM?
- What processes does your organization have regarding case documentation?

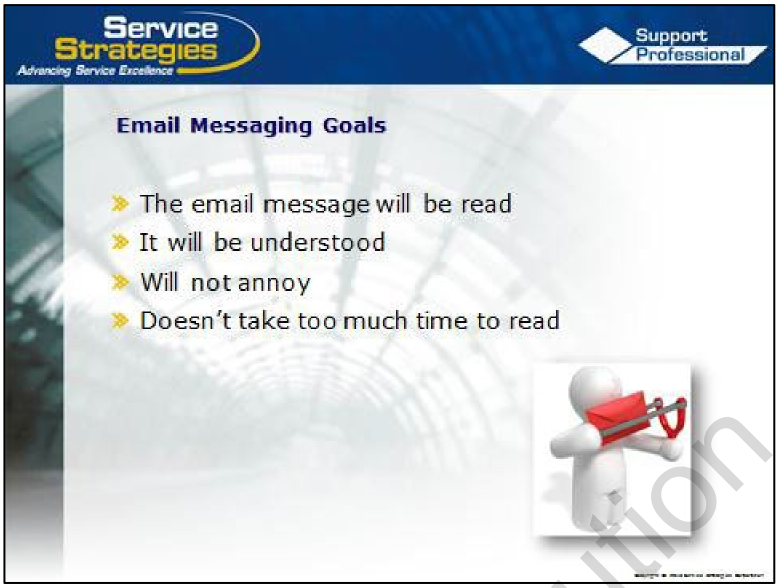
Online Protocol and Professionalism



You can maximize the benefits of online communication by following basic **protocol and professionalism** rules in your everyday communications with customers.

- Follow the same standards of behavior that you follow in real life.
- Respect other people's time and system constraints.
- Make sure the customer knows WIIFM.
- Be forgiving of other people's mistakes.
- Take anger out of reply messages. Walk away if you need to; send the message later when emotions aren't high.
- Do not be too transparent. Tell only what the customer needs to know.
- Use a positive online response tone.
- Emotions are not eliminated because it's online; determine when a call is needed to better serve the customer.

As with telephone communication, you are the company so keep these guidelines in mind when communicating online.



Remember the goals we talked about earlier regarding leaving a voicemail message? Well, those goals are also applicable for email communication. When you have multiple points or a complex message to tell your customer, the best course of action is to send an email.

<u>Keep these goals in mind when writing email:</u>

- **The email message will be read** – Ensure the subject line is concise and pertains to the topic discussed. State the purpose of your message at the beginning of the email and in as few words as possible. Remember the WHY before the WHAT.
- **It will be understood** – Ensure that your email has a logical flow in addition to being accurate, brief, and clear.
- **Will not annoy** – Be brief and to the point! Over the next few pages we will learn techniques on how to organize your email to ensure it is easy to read.
- **Doesn't take too much time to read** – Respect the receiver's time by keeping the email brief.

8 Steps to Responding

While it is important to respond professionally, it is just as important to perform specific steps to ensure complete and efficient information transfer.

1. **Interpret the initial message:**
   - Their subject line – Is it what they want or a symptom of what's wrong?
   - Is what they say what they mean?

2. **Find the problem:**
   - Locate the real problem – This will be discussed in more detail in the <u>Information Gathering Module.</u>

3. **Organize the email response:**
   - Heading – Create your subject line to include action or central point
   - Greet with first name, if appropriate
   - Identify yourself and context, if it's the first interaction
   - It is recommended to use 'we' rather than 'I' at first, and move to "I" as the comfort level between you and your customer increases

4. **State the problem:**
   - Restate the original message
   - Use reply so the original message is included
   - State your understanding of the issue or customer's need

5. **Request further information if necessary:**
    - Explain why information is needed
    - Provide a clear description of your request

6. **Describe causes:**
    - Keep explanations at user level – remember the Levels of Learning
    - Take time to give extra information

7. **Explain remedies and procedures:**
    - Give options and alternatives – "We recommend…", "we've found…"
    - Adhere to company standards
    - Let the customer know where you are in the process

8. **Write a professional, helpful closing:**
    - Avoid Sincerely, Yours Truly – Use "Regards" or "Thank you"
    - Encourage the reader to send further emails or to call
    - Use signature at end – Include your name, position, company, email, phone number, and URL (if applicable)

Following the eight steps above will ensure a well-organized response that provides the customer with acknowledgement, information, and a feeling of professionalism and confidence in you. Including each of these steps also provides a department wide guideline that promotes consistency and efficiency.

ACTIVITY – INTERPRETING EMAILS #1

Read the email below and answer the following questions.

Subject: Screen keeps freezing

Body: Every time I use this computer the screen freezes up on me and I'm getting FED UP WITH THE WHOLE THING! I don't have time to restart this machine every time I turn around it takes 10 min's to bring it all back up and the email, word processor, desktop publishing, and photo shop all going again just to have it happen all over again! I called a week ago & couldn't get thru so I'm trying email. Do you not have enough support people or what? I get just so far, then for no reason that I can see it locks up. It seems like it happens most when I try to open photo shop. Also, it seems to happen late in the day, like it's tired or something. I just know it has to get fixed soon.

John Simpson

1. What is your reaction to this email?

____

2. Should you respond to the accusation that the company needs to hire more staff?

____

3. Does this sound like an emergency? _______________

4. Do you have enough information to solve the problem?

____

ACTIVITY – INTERPRETING EMAILS #2

Read the email below and answer the following questions.

Subject:	run time error
Body:	I'm trying to set up SQL statements in VB and get Run Time Error 40069. It's not consistent but appears at times when adding field names to the SQL statements. I'm using VB 5.0. I've tried different things to trigger it, it's driving me crazy! Please respond ASAP, as I have a deadline on completing this project. Stuart Kluger

QUESTIONS:

What is the learning level of this user? Why?

____

____

Does this sound like an emergency? Why or why not?

____

____

Read the response to Stuart Kluger's email and answer the questions below:

Subject: Resolution to run-time error 40069

Body: Dear Stuart,

We understand your frustration, we have researched the problem & lo & behold it turns out to be a known problem that others have seen and there is luckily an answer for this really frustrating issue.

Let me briefly summarize what we believe to be the cause. When adding field names to an SQL statement it is really crucially important to make sure the name you type exactly matches the field name in the table, in other words, if the table name starts with a capital letter then the statement name has to also start with a capital letter so they match exactly. So always go back & check the table names before adding the statement names, that should solve the problem. Or another thing that will help is to after opening the record set, manually specify the Source Table property of the problematic columns prior to doing any data access.

If you have any trouble with this please call or email, and please know that we appreciate your business very much.

Regards,
Jose Suarez

Is this a clear response? Why or why not?

____

____

____

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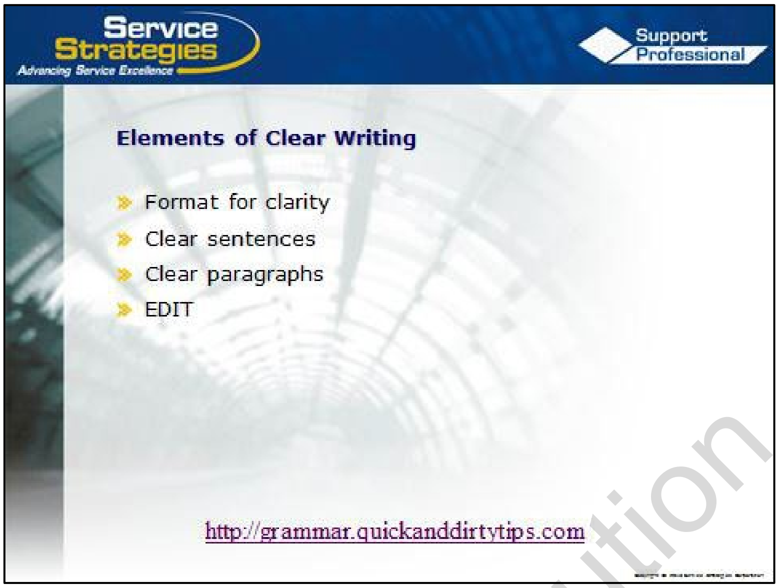


Clarity is as important as content in a written response. A well-written response conveys all the information the reader requires with ease of understanding.

Elements of Clear Writing:

Format for clarity
- Use caps, lower case, fonts, italics, and bold appropriately
- Write central message towards the beginning of your response
- Limit line length to 65-70 characters
- Consider adopting a template for the support center

Clear sentences
- Use concise, complete sentences
- Be concrete – who, what, where, when, why, and how
- Avoid euphemisms, sarcasm, humor, and acronyms

Clear paragraphs
- Use headings
- Use clear, simple key words and keep them consistent
- Use white space between each paragraph
- Break paragraphs with each new idea

Clear procedures

- Task orientation
- Include only processes the customer needs
- Number steps, break into lists
- Include information that will help if things go wrong

Edit

- 30 second review before sending or saving as a permanent record
- Use basic grammar rules. A good grammar web site can be found at http://grammar.quickanddirtytips.com/
- Eliminate redundancies and wordy phrases

When you use the elements of clear writing, this increases the probability that the issue will be resolved quickly and positively.

> ***"I endeavored to write you a considerably shorter letter, my dear, but I simply did not have the time."***
> *-Mark Twain*

ACTIVITY – INTERPRETING EMAILS #3

Compare the previous run-time error response with the revised response below.

Subject: Resolution to run-time error 40069

Body: Dear Stuart,

We understand your frustration with adding field names to the SQL statement in VB. Our research of the run-time error msg 40069 has resulted in the resolution below.

To summarize the cause, when adding field names to an SQL statement it is important to match the field name in the table, including case.

Follow one of these steps to prevent the error msg:

- Type the field names using the same case as the field names in the ODBC table.
- After opening the recordset, manually specify the Source Table property of the problematic columns prior to doing any data access.

For further questions please call or email. We appreciate your business.

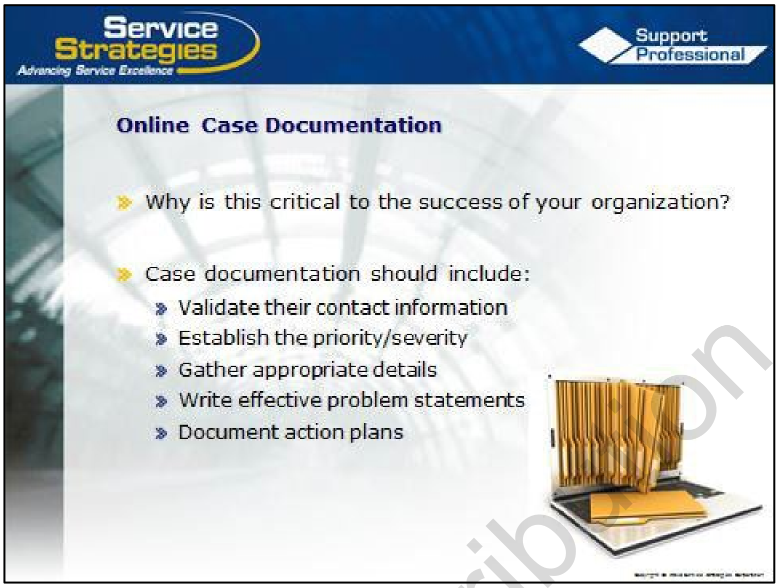
Regards,
Jose Suarez
Senior Support Engineer
Datanow, Inc.
Juarez@datanow.com 897-437-5719

1. What elements of clear writing did the support professional use to optimize understanding?

2. Did he properly utilize the “8 Steps to Responding”?

3. What else could be done to make this response even clearer?

Online Case Documentation



Why is case documentation critical to the success of your organization?

Document the following pieces of information:

- Validate the customer's contact information
- Establish priority/severity
- Gather appropriate details for you AND others
- Write effective problem statements
- Document the action plans; yours and theirs

Poor call documentation will slow, if not stop, the resolution and escalation process. Also, complete and accurate documentation is one of the means by which company call performance is measured.

MODULE 6 REVIEW QUESTIONS

1. In telephone communication you should explain the WHAT before the WHY.
    a. True
    b. False

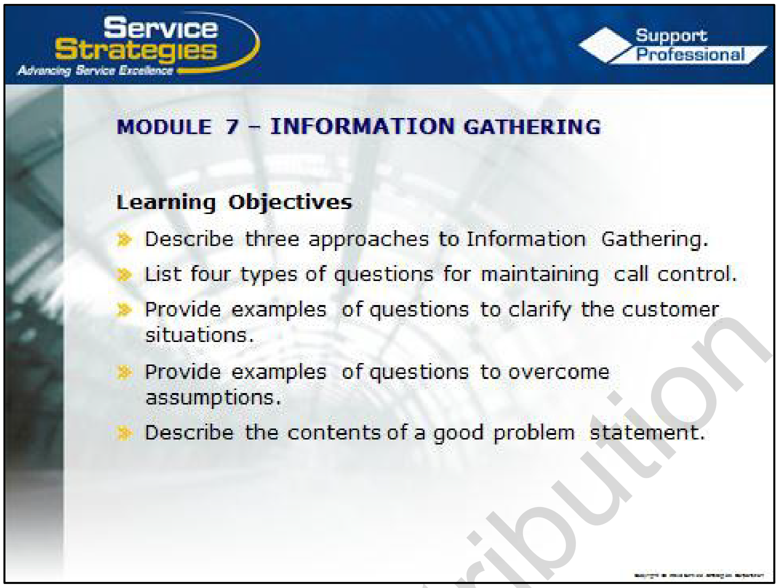
2. Which of the following will NOT damage your rapport with your customer?
    a. Negativity
    b. Using jargon
    c. Dominating the conversation
    d. Summarizing

3. Which of the following is NOT part of the documentation process?
    a. Write an effective problem statement
    b. Establish priority/severity
    c. Cost of resolving the issue

4. What response step is recommended in the “8 Steps to Responding” after interpreting the initial message from the customer?
    a. Find the problem
    b. Request further information
    c. Organize the email response

5. One of the goals when writing an email is to ensure it does not annoy the recipient.
    a. True
    b. False

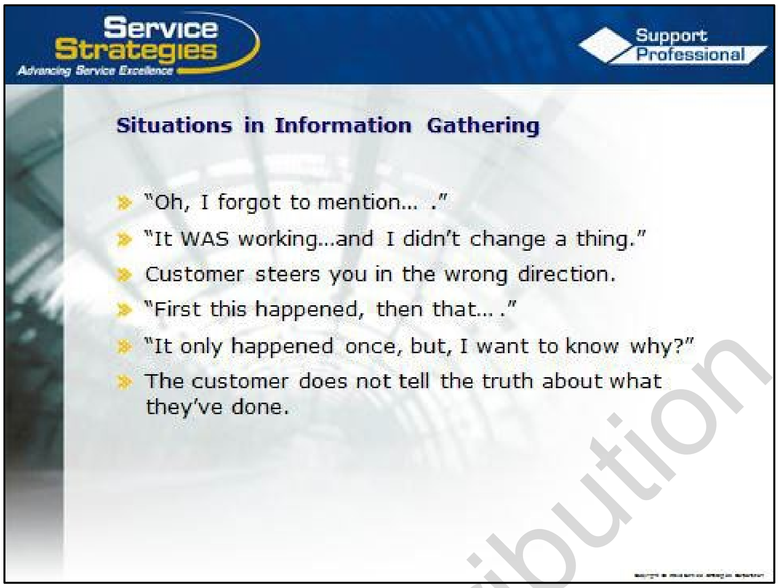
MODULE 7 – INFORMATION GATHERING



Learning objectives for Module 7 - Information Gathering:

- Describe three approaches to Information Gathering.
- List four types of questions for maintaining call control.
- Provide examples of questions to clarify the customer situations.
- Provide examples of questions to overcome assumptions.
- Describe the contents of a good problem statement.

Situations in Information Gathering



Information Gathering is the first step in problem solving. If you are going to be successful, you must use an appropriate approach and ask effective questions.

Effective information gathering and questioning will overcome some of the frustrating circumstances that occur in day-to-day problem solving efforts. These situations delay solutions and in some cases waste time. It is your responsibility to manage the situation.

"Oh, I forgot to mention…"
The customer has 'selective memory' of the information that may be important to your efforts to efficiently provide them an answer or a solution. Again, it is your responsibility to ask all the pertinent questions to gain a thorough understanding of the situation.

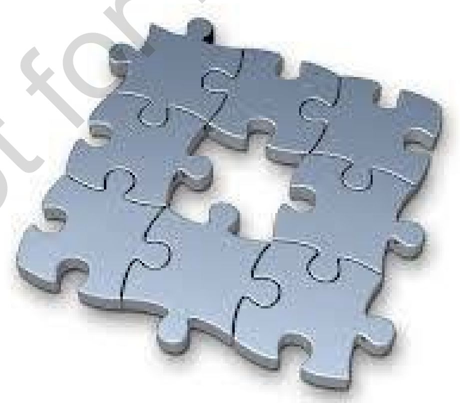
"It WAS working…and I didn't change a thing."
You have heard this statement all too frequently. The customer just doesn't remember making a change. It may appear unrelated, or in fact, someone else may have initiated the change. Whatever the situation, you should explain to them what may have happened.

Customer steers you in the wrong direction.
It is very easy for the customer to misdiagnose the situation and provide information that is confusing or not even related to the real problem. Do not make assumptions about what is said by the customer.

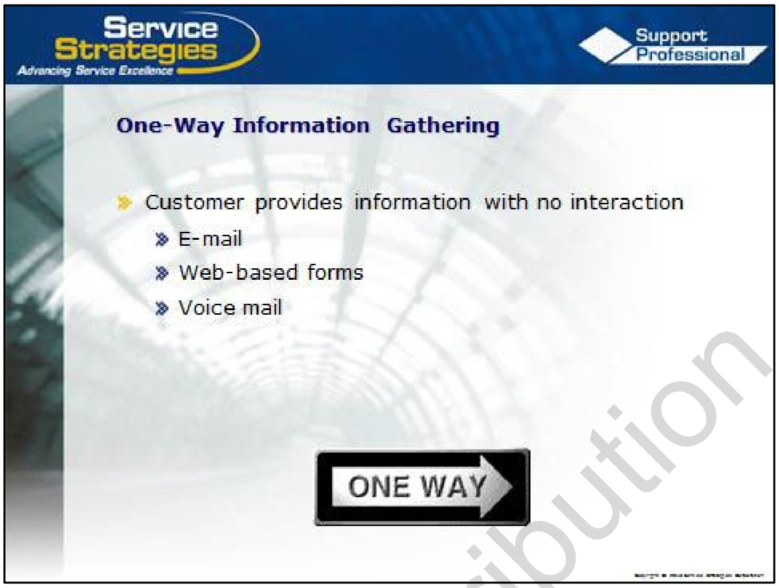
"First this happened, then that…"
Sometimes the customer provides far too much information. Lead them by using questions to control the dialogue. When appropriate, the situation should be broken down into multiple problem statements (separate "cases").

"It only happened once, but I want to know why?"
How often does this happen? The customer noticed a deviation and without any information about the circumstances leading up to the problem, expects a solution. Do not waste valuable time when there are no answers. Instead, tell the customer about common possibilities that could explain the situation, but also give them some help to collect relevant information the next time the problem occurs.

The customer does not tell the truth about what they've done.
While this is not always intentional, ask questions that verify the assumptions and evidence. Find a way to question the customer to get all the facts i.e. print screens.

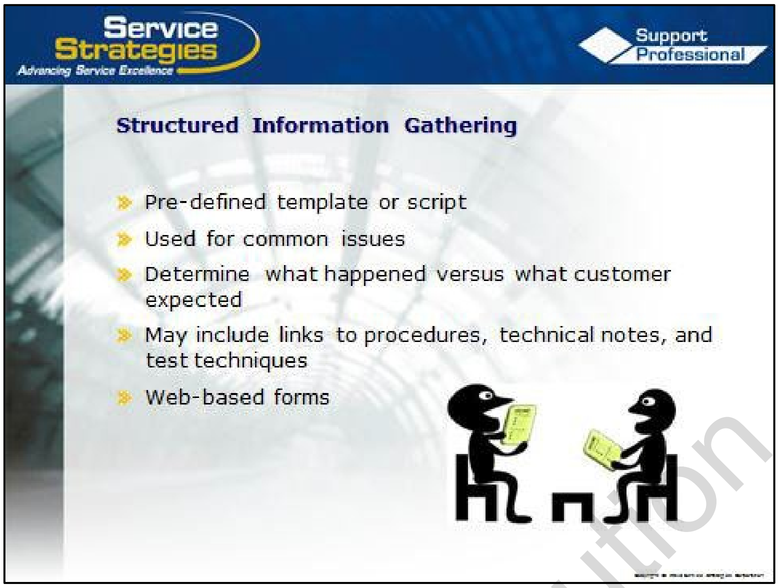


Information Gathering Approaches



One-Way information gathering can be obtained using electronic technology such as e-mail, web-based forms, or voice mail. There is no immediate interaction or feedback and it is usually applicable in lower priority situations.

The Unstructured approach is the most common technique used by support staff. The customer volunteers information about a problem and the support professional asks questions in a free-form fashion. This is a more conversational style of gathering information.



The Structured information gathering approach uses a pre-defined template or script and is typically developed for common issues. The questions focus on what happened versus what the customer expected.

<u>Examples of questioning areas in templates include:</u>

- Priority
- Product/application information
- Environment information
- Error codes and messages

ACTIVITY – INFORMATION GATHERING APPROACHES

Instructions:

1. List THREE advantages (pros) of each approach.
2. List THREE disadvantages (cons) of each approach.
3. Explain under what circumstances you should switch from that approach to another approach?

One-Way Information Gathering

Pros	Cons
______________________	______________________
______________________	______________________
______________________	______________________

When should you switch to another approach?

____

____

____

Unstructured Information Gathering

Pros

Cons

When should you switch to another approach?

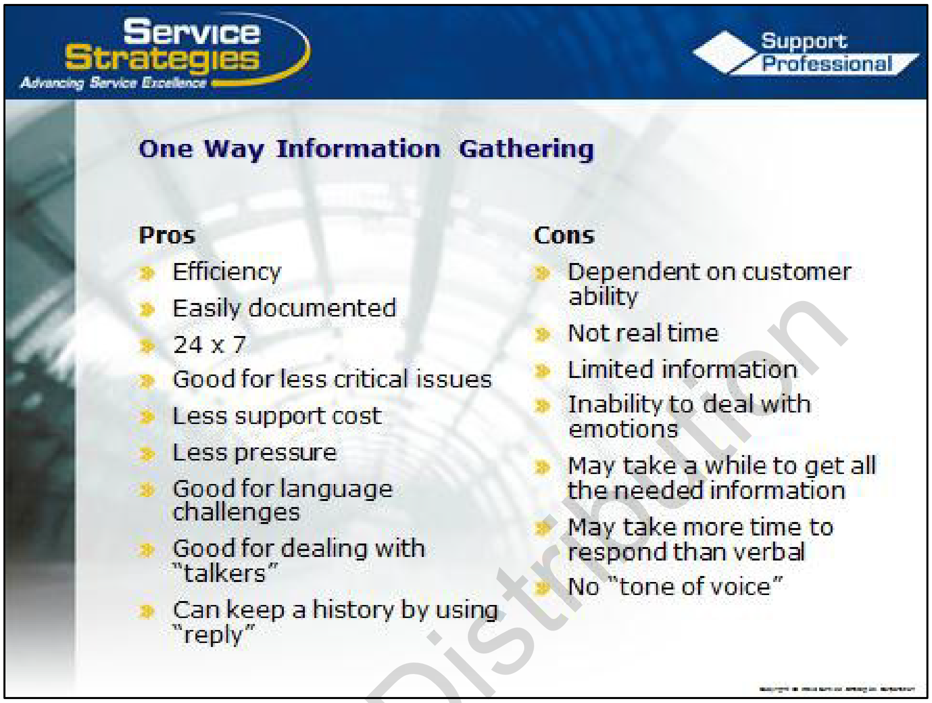
Structured Information Gathering

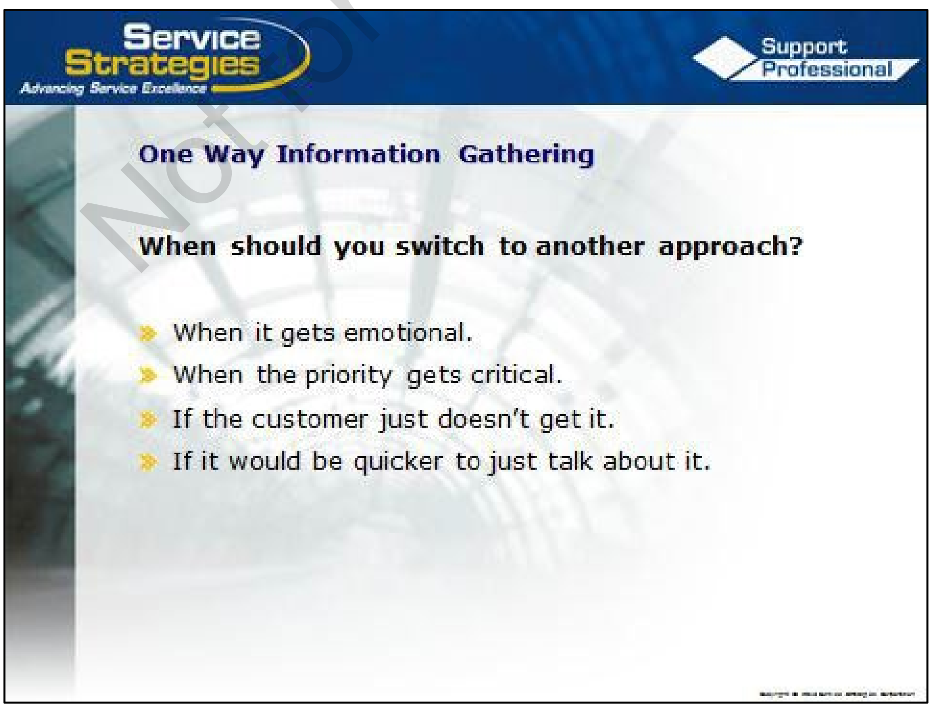
Pros

Cons

When should you switch to another approach?

As with all Information Gathering techniques, you will find many pros and cons associated with each approach.





Service Strategies
Advancing Service Excellence
Support Professional

Unstructured Information Gathering

Pros

- Good for experienced support professional
- Flexibility and give and take allows for efficient clarification
- Good approach to deal with "undefined" problems
- Can deal with emotional issues
- Useful to establish rapport

Cons

- Less effective with inexperienced support professional
- More stressful than electronic
- Wrong questions lead to misleading results
- Relies on communication skills
- Difficult when customer doesn't want to talk
- May miss key questions and have to call back

Service Strategies
Advancing Service Excellence
Support Professional

Unstructured Information Gathering

When should you switch to another approach?

- When it is a common problem and a structured approach is available.
- When a process can more effectively be transmitted via an electronic method.
- When dealing with language issues.
- When you're dealing with a talker.
- When the customer just cannot articulate the problem (recommend they document it in an electronic request).

Service Strategies
Advancing Service Excellence

Support Professional

Structured Information Gathering

Pros

- Focused on the relevant information
- Fewer call backs for more information
- Credibility of less experienced
- Consistent across organization

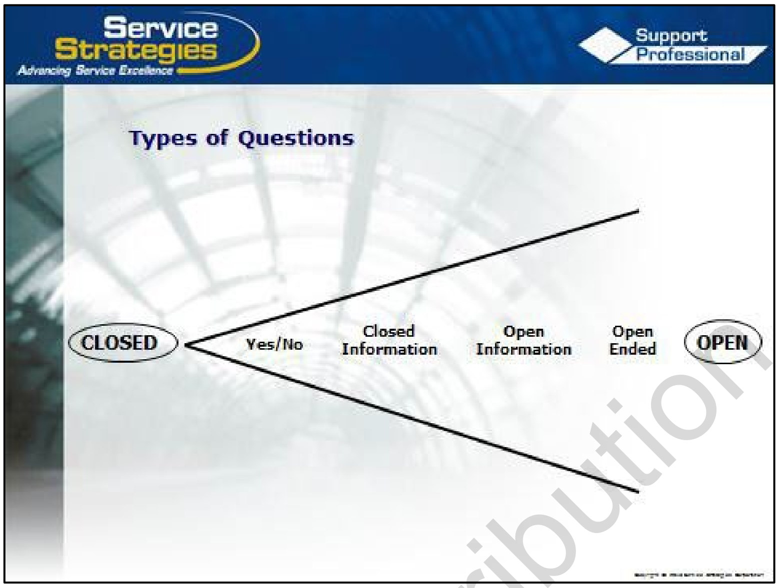
Cons

- Training is required
- Initially the problem identification process may take longer
- Questioning may need to go outside its scope
- Time to develop and keep updated

When should you switch to another approach?

- When you've finished asking the questions.
- When it doesn't fit the situation.

Types of Questions



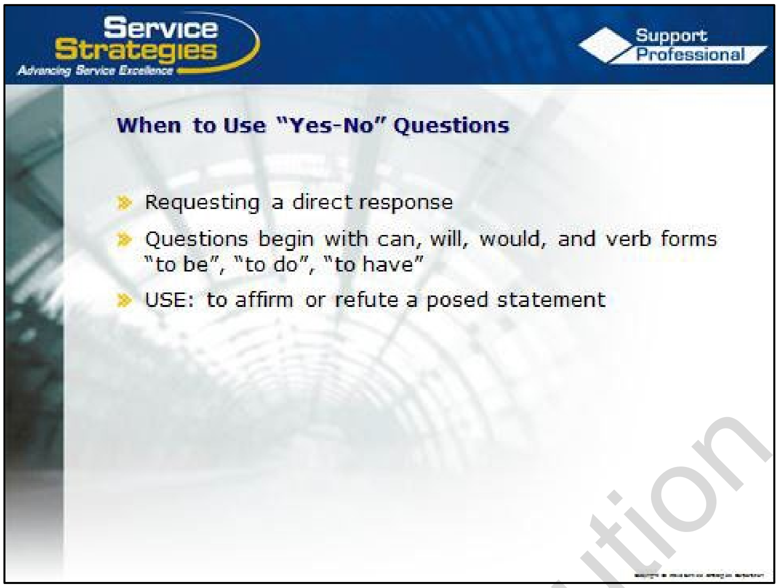
In order to maintain control of the call and manage talk time, it is necessary to use the appropriate questions. The types of questions range from closed, to open questions.

The most closed questions are **"Yes-No"** questions where YES and NO are the only answers available as the customer response.

With a **"Closed Information"** question, you are allowing the customer to select from a finite list of answers.

Opening things up a bit more, you get to the **"Open Information"** questions. This still puts restrictions around the answer by telling the customer the subject matter, but you are asking for descriptive information.

For the most descriptive answer, you ask an **"Open-Ended"** question. This allows the customer to describe something to any extent they choose with no limits. This includes opinions, possible causes, and effects.



With the "Yes-No" question, you are simply asking the customer to select from two choices. You're not expecting "maybe," but a direct "Yes" or "No" response. "Yes-No" questions might begin with "can, will, would," and verb forms of "to be," "to do," or "to have." Such as "Is that …?", "Did you…?", "Has that…?"

Our purpose here is to affirm or refute a situation, position, etc.

Use "Yes-No" questions to maintain control and to verify and validate information about the problem, the customer situation, etc.

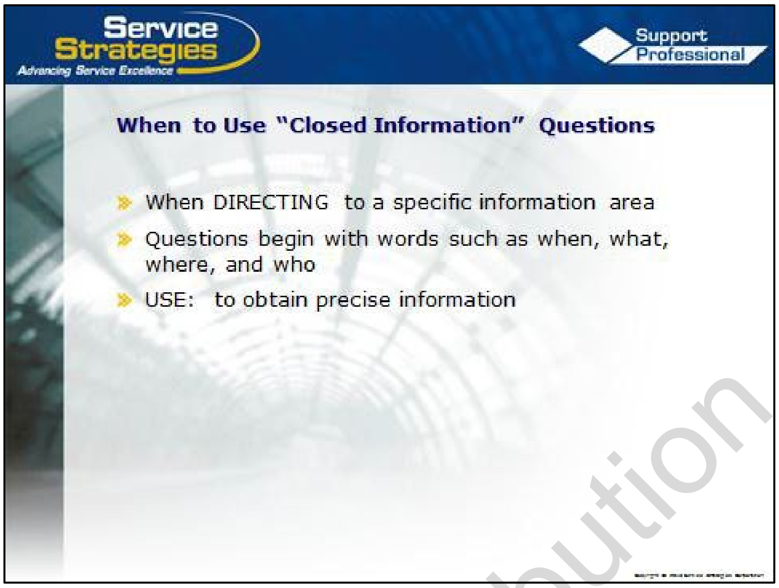
ACTIVITY – "YES-NO" QUESTIONS

Write examples of "Yes-No" questions:

____

____

____



Sometimes you require short and specific answers that involve facts or objective observation about the problem. You need more information than simply "yes" or "no," but you still want to maintain control.

With "Closed Information" questions, you direct the customer to a specific information area where there is a finite set of choices.

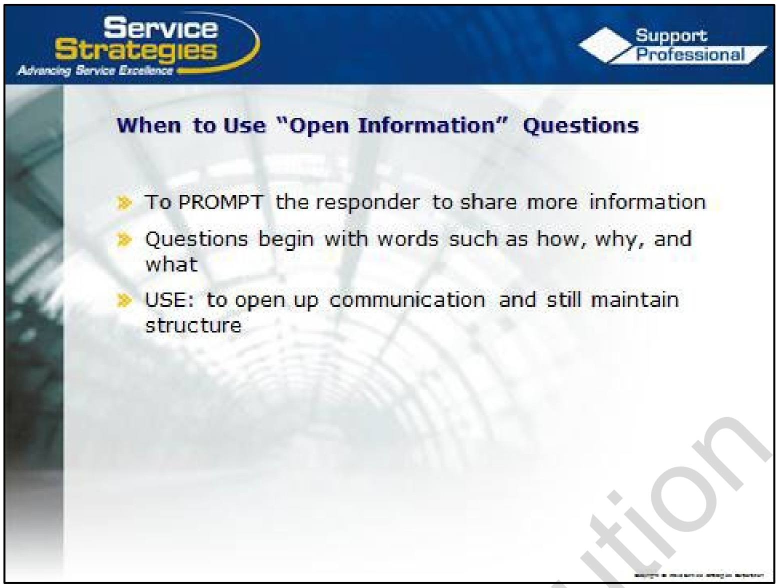
ACTIVITY – "CLOSED INFORMATION" QUESTIONS

Write examples of "Closed Information" questions:

____

____

____



Closed questions don't always provide the detail that is needed to effectively resolve the problem. When you need more details, but want to retain some control of the subject matter, you utilize "Open Information" questions.

"Open Information" questions are used to allow the customer to expand on a SUBJECT of interest at some length. You want them to give a description, but you are still putting some boundaries around the information the customer is to provide.

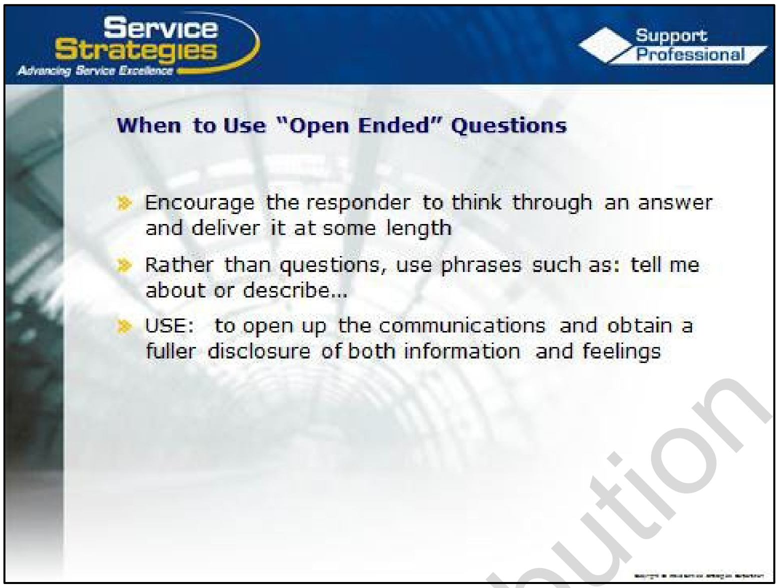
ACTIVITY – "OPEN INFORMATION" QUESTIONS

Write examples of "Open Information" questions:

____

____

____



When you want information from the customer with no constraints, you ask "Open Ended" questions.

With the additional information, you are allowing the customer to provide opinions, feelings, discuss effects, etc.

You need to use "Open Ended" questions to obtain full disclosure from the customer.

ACTIVITY – "OPEN ENDED" QUESTIONS

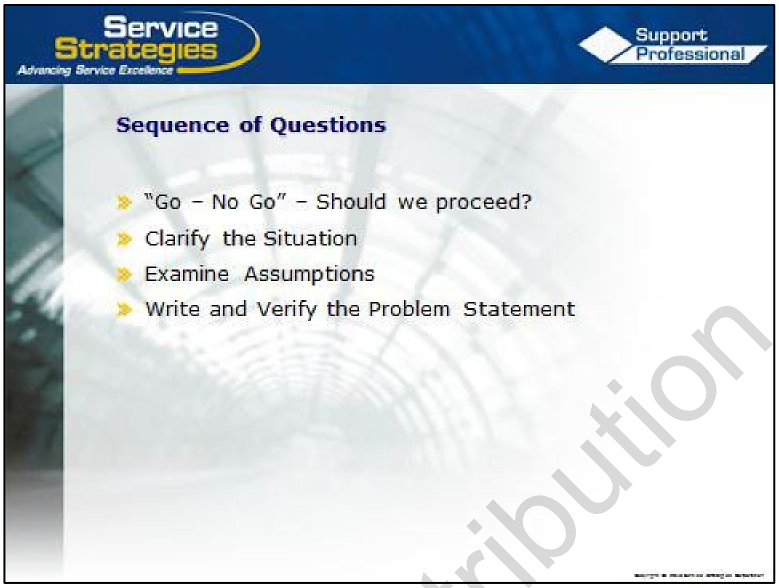
Write examples of "Open Ended" questions:

____

____

____

Sequence of Questions



<u>You need to systematically ask questions to gather information in order to determine the REAL problem of the customer.</u>

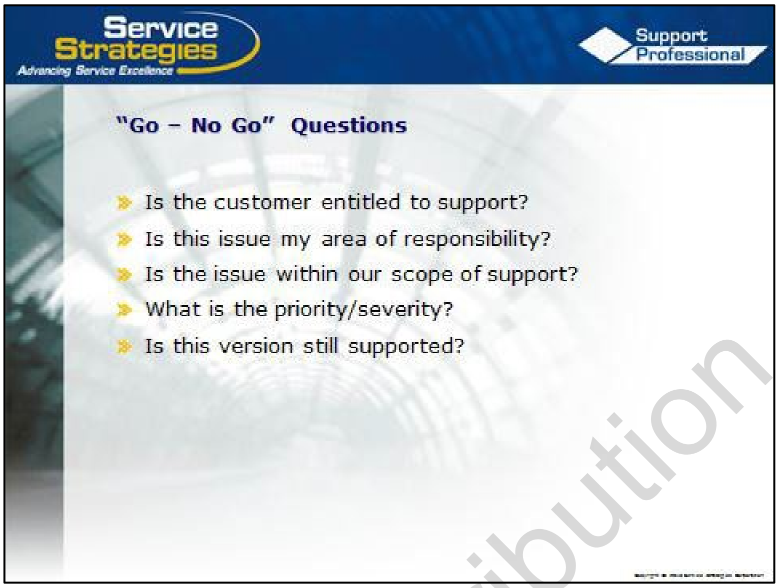
- **"Go – No Go"** – Before you spend a lot of time working with the customer, determine whether you SHOULD proceed and also gain an initial understanding of the issue.

- **Clarify the Situation** – These questions need to be asked to ascertain exactly what the customer means.

- **Examine Assumptions** – It is important that you examine assumptions and verify that the information given by the customer is accurate and true.

- **Write and Verify the Problem Statement** – During the course of your questioning, you should reach the point of creating and verifying the statement of the problem you intend to analyze.

In order to efficiently get to the actual statement of the problem, a systematic process of asking questions is required. Then, before you start analysis of the problem, you need to be sure you are working on the correct problem.



When you begin with the customer, you need to decide whether to start, stop, postpone, or redirect them to another area.

<u>Questions such as the following will aid in this process:</u>

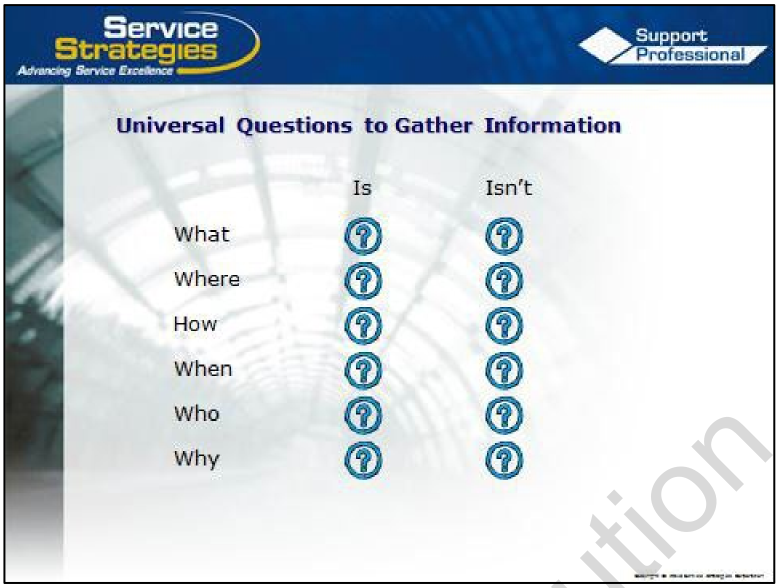
- Is the customer entitled to support? Is their contract up-to-date?
- Is this issue my area of responsibility? Is this the correct technical area or does the customer need to be redirected to another person?
- Is the issue within your scope of support?
- What is the priority/severity? You should understand the impact from a business, technical, and marketing perspective.
- Is this version still supported?

ACTIVITY – "GO - NO GO" QUESTIONS

What are the "Go - No Go" questions you would ask for the following customer issue:

"I have a problem with the program. I am getting error message 545. I tried rebooting and running the application again, but got the same error."

What "Go – No Go" questions should you ask?



Effective questioning is key to your success in information gathering. The universal set of questions is a good start. The universal questions are the classical newspaper reporter set to gain immediate information about a situation.

You can double your set of questions by asking both the "is" and "isn't" relative to the issue.

You should be careful with "Why?" as it can be intimidating to the customer. For example, "Why did you do that?" can come across as critical of them or condescending.

ACTIVITY – UNIVERSAL QUESTIONS

For each of the following questions, write the opposite, or the "isn't" question.

1. **What** symptoms did you see?

___

2. **Where** in the process did this occur?

___

3. **How** often has this happened?

___

4. **When** did the problem occur?

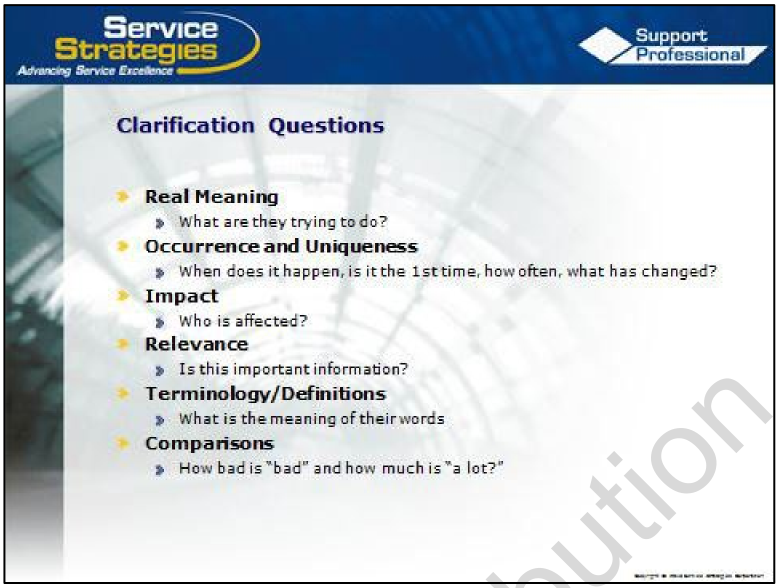
___

5. **Who** is affected?

___

6. **Why** did this happen?

___



The customer's problem likely requires clarification as to what is really meant.

<u>You must work your way through vagueness, ambiguity and uncertainty.</u>

- **Real Meaning** – What is the real meaning of the customer's statement? Just what are they trying to do? To what extent are they attempting something?
- **Occurrence and Uniqueness** – How often has this occurred? When does it happen? Is it the first time? What has changed?
- **Impact** – Who is affected? How is their business affected?
- **Relevance** – Is this important information? Is it related to the problem at hand or another issue? Is this a symptom or effect?
- **Terminology/Definitions** – What do they mean by that? Have them define the term or acronym.
- **Comparisons** – How bad is "bad" and how much is "a lot?"

You need to identify ambiguities and vagueness early in the process. When you pick up signals that the message is not clear, you need to ask the right questions to ensure you are efficiently solving the right problem.

ACTIVITY – CLARIFICATION QUESTIONS #1

Instructions: In one minute, write as many clarification questions as you can about this telephone message.

Telephone Message:

"I'm flying in tomorrow at 8:00. Meet me at the airport."

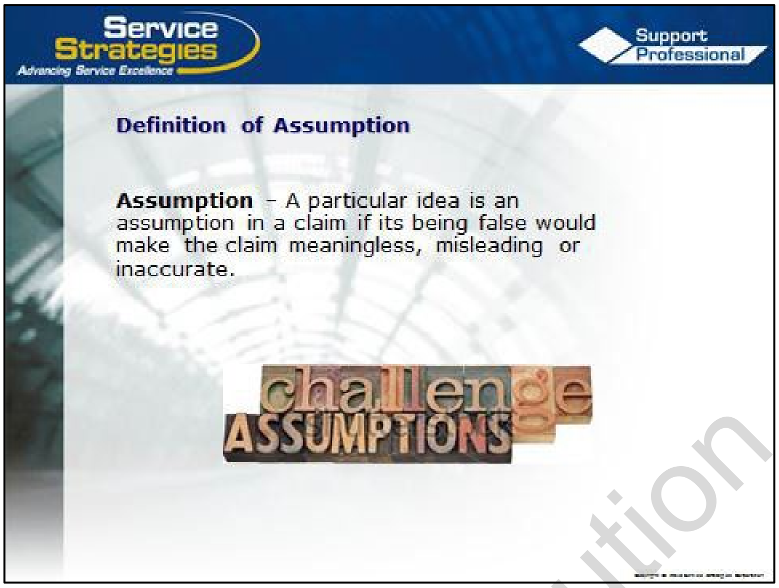
ACTIVITY – CLARIFICATION QUESTIONS #2

Instructions: In one minute, write as many clarification questions as you can about this customer issue.

Customer Issue:

"Your product is not working. It runs for a while and then just fails. It does this frequently. It is creating a mess for our business. What can you do for us?"

What clarification questions should you ask?



We routinely draw conclusions in situations. The conclusions we draw are often based on assumptions that operate at an unconscious level.

Assumption – A particular idea is an assumption in a claim if it's being false would make the claim meaningless, misleading or inaccurate.

<u>Here are some examples of assumptions:</u>

- A buzzing noise from your computer is **assumed** to be related to the hard drive.
- Making changes to the operating system parameters is **assumed** to be complex.
- The customer has a problem with a new software program. You **assume** it's the program, but maybe it was the installation.
- In talking with a Level 4, you **assume** they have done the basics. For example, rebooted, checked basic settings etc.

> **"Trust, but verify."**
>
> *-Reagan*

ACTIVITY – ASSUMPTIONS

Complete the following sentences.

1. We hear a door slam and assume that ______________________________
2. Your phone rings in the middle of the night and we assume that

   ____
3. The customer uses good terminology and sounds confident and we assume they ____
4. What other statements do you hear from your customers that contain assumptions?

____

____

____

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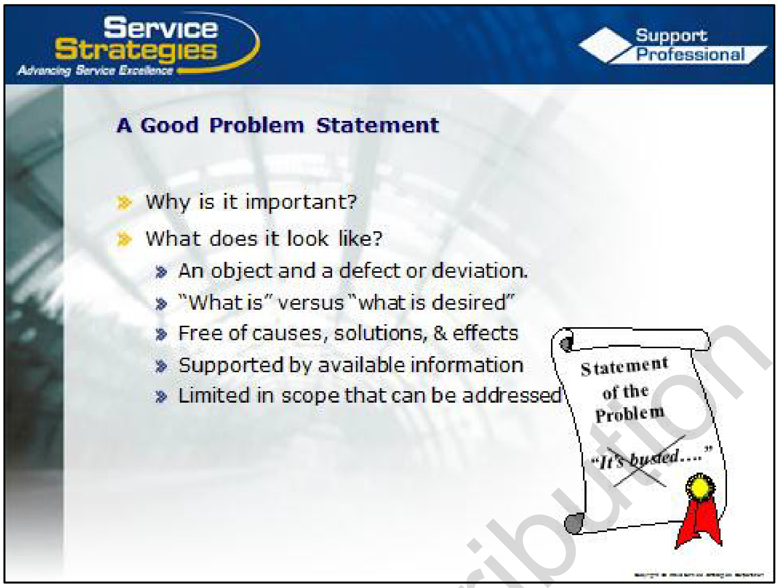
____

____

Problem Statements



Good problem statements allow you to verify your focus. The problem statement provides a succinct description of the case. It is also an effective "tool" for knowledge searches in the future.

Where do you see the problem statement and why is it important?

A good problem statement is as follows:

- Includes an **object and a defect or deviation**. Ask the customer, "When you try to do __ , you get _ . Is that correct?"
- Tells us **"what is" versus "what is desired**." An example would be, "When running the report in the DISPLAY mode, error 745 occurs."
- Is **free of causes, solutions and effects**. It should just include the facts.
- Is **supported by available information**. Traces, logs, and displays support the problem statement.
- Is **limited in scope that can be addressed**. Multiple problems should be treated as separate cases.

"A problem well stated is a problem half solved."
-Charles F. Kettering

ACTIVITY – PROBLEM STATEMENT ACTIVITY

Write a problem statement for an issue that might occur with your product(s).

MODULE 7 REVIEW QUESTIONS

1. Which Information Gathering Approach uses a pre-defined template or script?
    a. One-Way
    b. Unstructured
    c. Structured

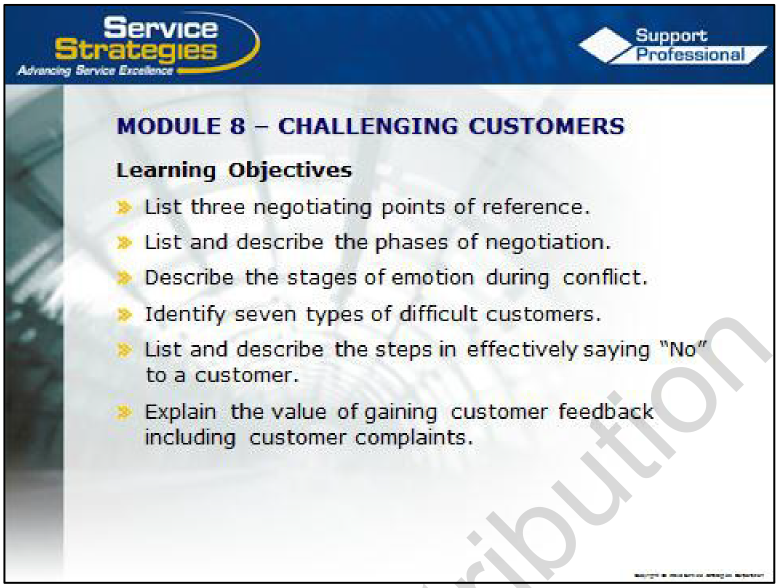
2. If the situation becomes emotional when using the One-Way information gathering approach, you should continue using that approach.
    a. True
    b. False

3. What question type allows the customer to select from a finite list of answers?
    a. Open Ended
    b. Open Information
    c. Closed Information

4. It is important that you examine the assumptions and verify that the information given by the customer is accurate.
    a. True
    b. False

5. How can you double the set of questions that you ask your customers?
    a. Repeat them twice
    b. Ask both the "is" and the "isn't"
    c. None of the above, you don't want to ask the customer too many questions

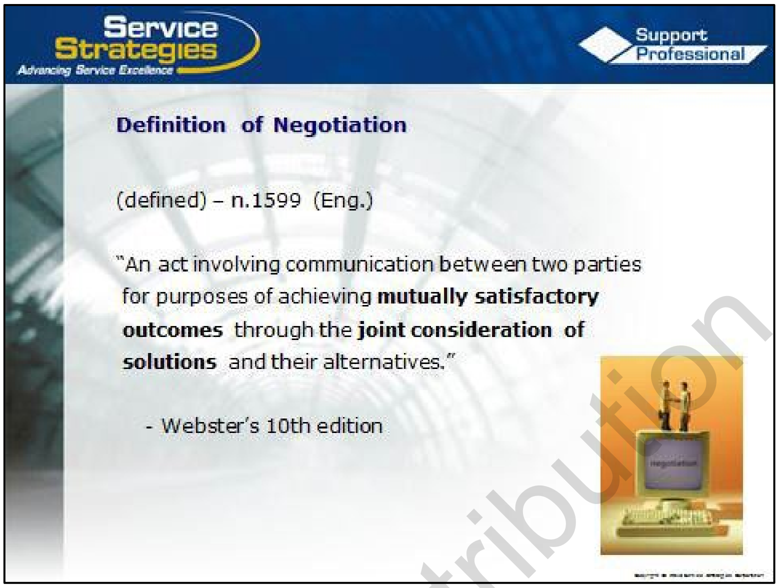
MODULE 8 – CHALLENGING CUSTOMERS



<u>Learning objectives for Module 8 - Challenging Customers:</u>

- List three negotiating points of reference.
- List and describe the phases of negotiation.
- Describe the stages of emotion during conflict.
- Identify seven types of difficult customers.
- List and describe the steps in effectively saying "No" to a customer.
- Explain the value of gaining customer feedback including customer complaints.

Customer Negotiations



Negotiation, though often considered an activity for management, is done every day in the technical support center between the support professional and the customer.

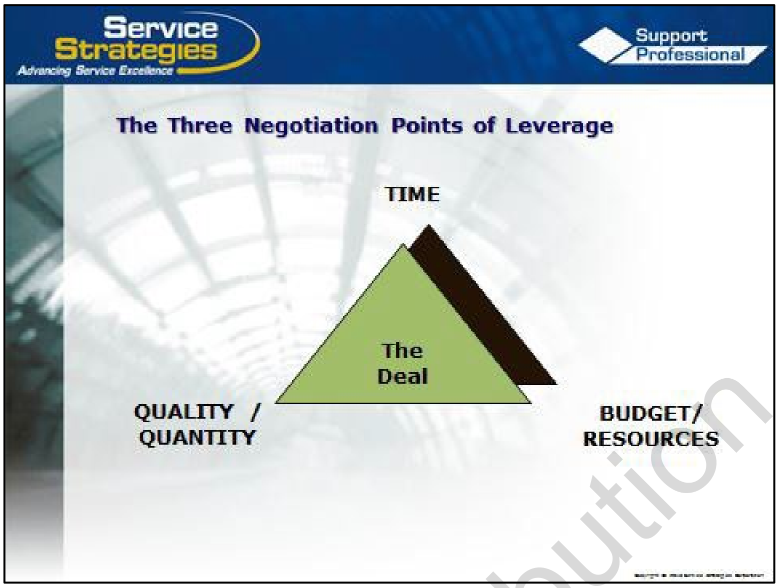
What kind of things do you negotiate?

____

____

____

Negotiation is a structured process based on a set of rules that, if followed, result in both sides being successful. Following the basic rules enables you to present yourself as an effective, confident negotiator.



Regardless of the product or issue, all negotiations are over one or more of the Negotiation Points of Leverage. Before entering into a negotiating session, evaluate your position in relation to all three points. Prioritize each of the three points from most to least important before entering into a negotiation.

Time – Time is a critical point in some negotiations because it has major impact on the other two points, i.e. Quality/Quantity, and Budget. Of the three points, time is the only one that money can't buy more of, or whose value cannot be reduced.

Quality / Quantity – Quality/Quantity also has a major impact on the other two points because it is the product of Time and Budget. It is infinitely adjustable up or down and as such is often one of the most hotly contested points in negotiations.

Budget/Resources – Erroneously considered to be the only point in most negotiations, it typically is no more a focal point than the other two. Most any budget figure can be reached if the negotiator is willing to give up Time or Quality in order to attain the budget goal.

When entering into a negotiating session, realize that you can successfully negotiate at least one of the points in your favor if you are willing to give your negotiation partner one or perhaps two of the other points.

Phase 1
LISTEN/PLAN to and with the negotiating partner to better sense their position relative to yours.

Phase 2
ESTABLISH MUTUAL GOALS AND OBJECTIVES through Phase 1 with discretion. Share information on a ‘need to know' basis.

Phase 3
IDENTIFY POTENTIAL CONFLICTS OR DISAGREEMENTS up-front. “Hidden agendas” destroy one's creditability – an important negotiating asset.

Phase 4
BARGAIN WITH A ‘WIN/WIN' AND ‘GIVE-to-GET' MENTALITY. This expedites the process immeasurably and preserves the possibility of doing business together again in the future.

Phase 5
AGREE OR SETTLE. Agree on what you ‘agree on' or ‘disagree on' but be clear on where you stand relative to the negotiating partner.

Phase 6
REVIEW THE STEPS. It is always good practice to review a process and see where improvement can be made for the next negotiating session.

ACTIVITY – PHASES OF NEGOTIATION

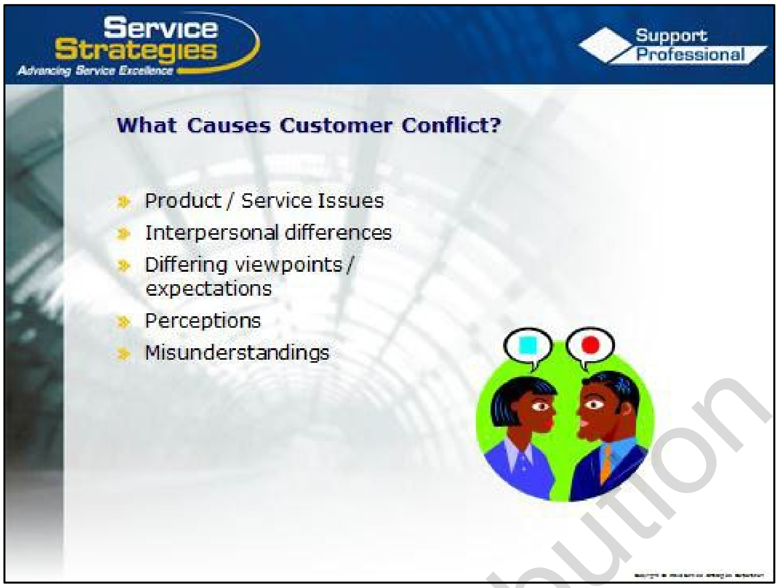
Match the examples on the left with the correct phase of negotiating on the right.

_____	1. Yes, I can have the patch delivered by next Tuesday.	a. Establish mutual goals and objectives
_____	2. I may not be able to get the patch to you by your deadline. Would a workaround for now work for you?	b. Agree or settle
_____	3. Although I can't make the Friday delivery date for the entire package, I can send part of it by then and the rest soon after.	c. Listen/plan
_____	4. What you're saying is that you need a workaround in the short term but a permanent fix eventually?	d. Bargain with a win/win mentality
_____	5. I want to solve your problem in the most practical way. What, specifically, do you need to accomplish?	e. Identify potential conflicts

Despite the well-intentioned rhetoric about developing 'Win-Win' negotiating partnerships, the fact is, many negotiating partners will be less interested in your 'win' than theirs. Towards this end, anticipate that they could utilize ploys and create artificial situations to make you settle for their latest offer.

<u>The following tactics may be used to win the negotiation:</u>

- **Good Guy/Bad Guy** – When participating in two on one (or more) negotiations, one person will be tough on you while the other apologizes and claims to be your friend.
- **Sympathy** – The partner empathizes with your 'unfortunate' negotiation position.
- **The Flinch** – Counts on shock-effect of their outrageous proposal to jolt you off your current negotiating position.
- **Authority-Limited or Higher** – In both cases they claim an authority greater than themselves must be consulted before considering your proposal.
- **Standard Practice** – Claims that "This is the way we've always done it!" as a ploy to get you to do it their way.
- **Deadlines** – Forcing a decision from you because of an impending deadline.

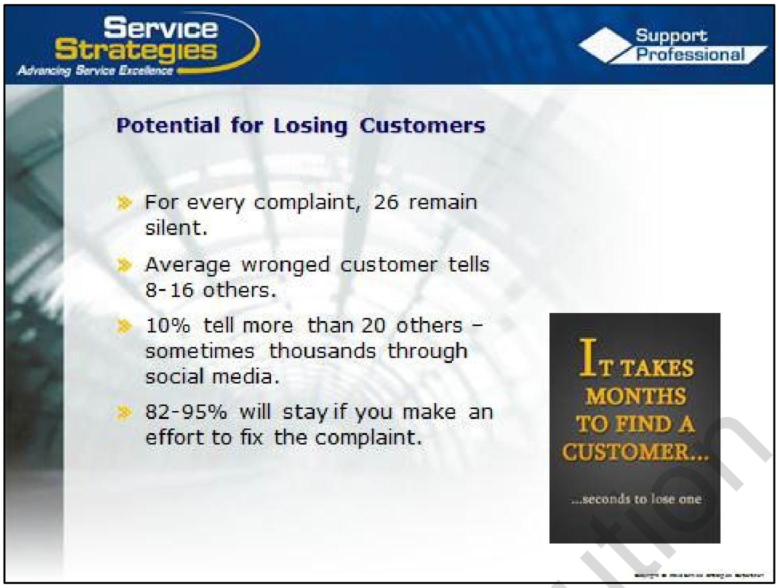


Conflict is inevitable in the daily operations of the technical support department. Conflict can be present before your interaction with the customer even begins or it may develop as the call progresses.

<u>Conflict may be product related or non-product related. Possible conflicts to be aware of include:</u>

- **Product/Service issues** – damaged or defective products, incomplete packaging, missing pieces, inadequate documentation, or unmet expectations of price vs. quality
- **Interpersonal differences** – conflicting differences in personality and communication styles
- **Differing viewpoints or expectations** – expectations of what the support professional is able to accomplish versus what the customer expects
- **Perceptions** – unmet expectations from past experiences
- **Misunderstandings** – placing blame, feeling that the support professional is defensive or not listening, having a 'bad day'

Awareness of common conflicts prevents you from being caught off guard, enabling you to anticipate and be prepared to handle them.



It's nearly inevitable that an occasional customer will be unhappy with your product or service. Studies have shown that **for every complaint that is made, there are 26 people who did not complain**. This is big! It means that if you receive 10 complaints, there are 260 other customers unhappy, but they didn't tell you.

Also, every **wronged customer will tell 8 to 16 others**. Think about it. The last time you were dissatisfied with service, how many people did you tell: Your colleagues, your friends, your relatives. When you are really upset, **you'll tell more than 20 (and 10% of the people who are dissatisfied do just that**). In fact, the Internet has become a powerful vehicle to tell thousands, if not tens of thousands, about dissatisfaction with a person or an organization.

Customers can now voice their frustrations with products and services to sites like Twitter, Facebook and YouTube. Customers know that by using social media, their issue will get a lot more attention and possibly a faster response than calling a support center. And sometimes, these complaints can go viral and really cause negative publicity for your company.

Even with social media, customers are still more likely to go through the support center first to complain about a product or service. This allows the support professional the opportunity to make an effort to please the customer and/or actually fix the complaint or issue. If you do this, as many as **82-95% of customers will stay with your company**. However, if resolutions aren't found or, more importantly, the customer feels ignored, be prepared for the consequences – social media consequences.

If taken in the proper way, customer complaints are 'gifts' that will tell you exactly **what needs to be fixed**, or is not working in your customer service center. Rather than speculate as to what the problem is, utilize direct customer feedback to focus on it quickly and decisively.

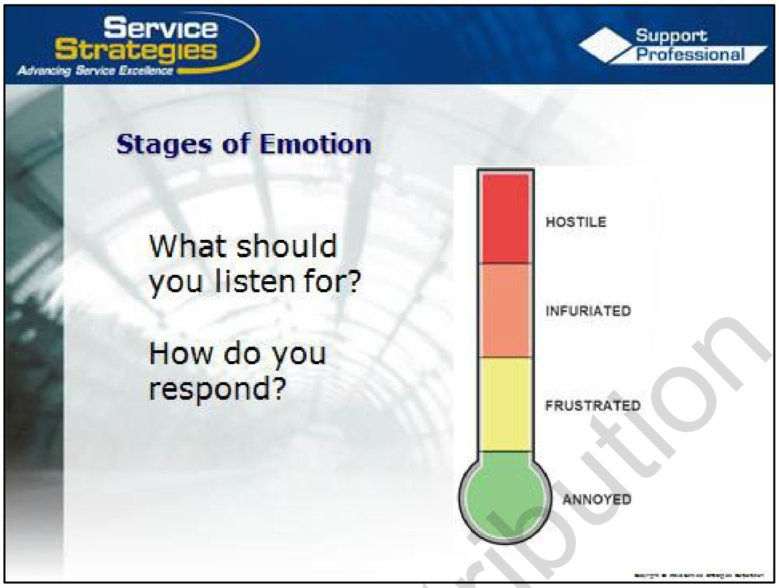
They **provide true insight into the customer thinking and evaluation process**. In many cases, the customer will not only tell you what the problem is, but how to fix it in a way that best meets their needs. These stated needs may be shared by the remaining client base.

The best way to **prevent a negative customer service experience from being passed on to other customers** is to discuss and resolve it with the original customer. In many instances, that will end it.

Since most voiced customer complaints can be considered to be 'exceptional' instances, those that are expressed can be considered to be critical in the eyes of the customer. **Criticality** is a factor that must be considered by customer service managers when prioritizing problems for resolution.

The voicing of a complaint by a customer is your clearest signal that something in your service center is wrong in their eyes.

Stages of Emotion

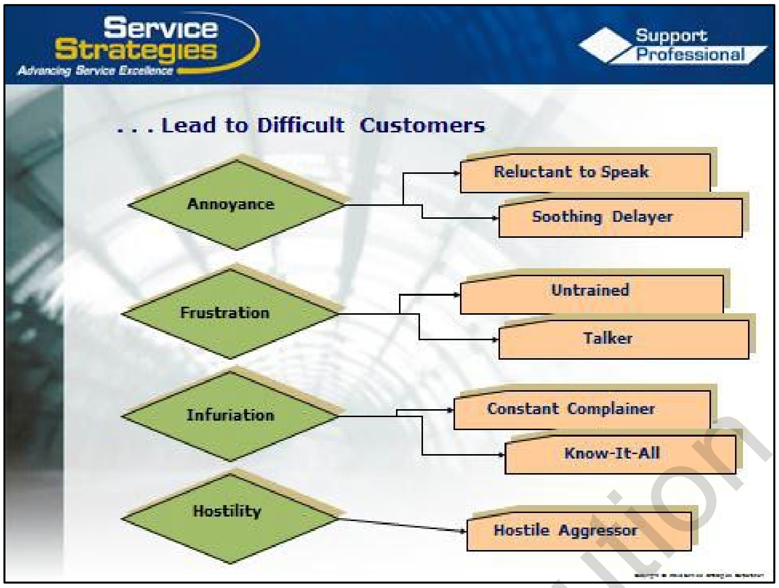


You can control the communication even in situations of conflict. Identify the stage of emotion and then use specific strategies to defuse the conflict and move forward.

Listening for the customer's signals of emotion, from annoyance to hostility, is critical in keeping your interaction on track. Any sign of conflict needs to be addressed before going forward.

Use the quick reference guide on the next page as a reminder of what to listen for and how to best respond to each emotional stage.

	What to Listen for	*How to Respond*
Annoyance	Inconvenienced. Listen for mild statements expressing the inconvenience of the issue. • I don't really have time for this today. • It worked fine before.	Convey understanding of the inconvenience and reassure that you can help. • I'm sorry that is happening. • I'd be happy to help. • We'll get this resolved as quickly as possible, how would this afternoon work?
Frustration	Unmet expectations. The customer will now start venting about the impact of the situation. • This is causing me delays in getting my work done. • This is driving me crazy	Convey your understanding of the impact of the situation and reassure that you will get it resolved quickly. • I understand you need to get this fixed right away. • Let's work together to get it taken care of.
Infuriation	Focus changes from the problem to your lack of action in solving it. • What do you mean you can't make that change right now? • I can't believe you have to transfer this simple problem.	Make a connection statement and then take control in moving forward with confidence to turn their perception around. • I apologize for this inconvenience and understand how frustrating it is. • This is what I can do. • What we need to do next is...
Hostility	Focus becomes an attack on you or your organization • I want your name and your manager's name right now! • What kind of organization are you running there?!	Specific steps need to be taken to defuse the anger and then begin resolving the issue • Let them vent just until they share information about the issue. • Begin with closed-ended questions to focus on issue once connection is made. • Be sure to follow through to be certain they buy into the answer you give.



It is important to recognize the types of behaviors exhibited by customers when they are in highly stressed, frustrated states of mind. The categories below are not necessarily tied to specific stages of emotion, but commonly appear during those stages.

<u>The seven common types of difficult customer are:</u>

- Reluctant to Speak
- Soothing Delayer
- Untrained
- Talker
- Constant Complainer
- Know-it-All
- Hostile Aggressor

These are not a continuum of behaviors nor are they exclusive of each other. A customer may exhibit more than one during the call and not in any particular order.

Familiarity with the categories of difficult behavior will help the support professional to plan responses that facilitate control of the call and the negotiation process.

Difficult Customers

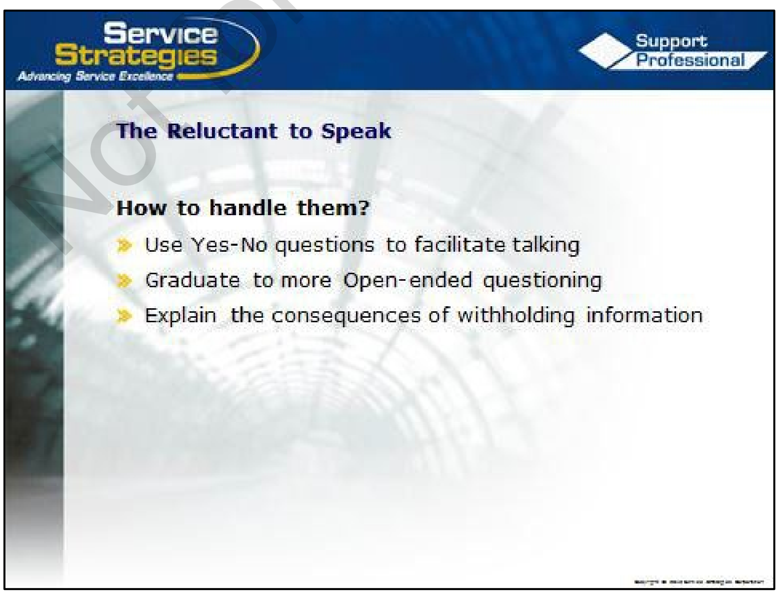
ACTIVITY - DIFFICULT CUSTOMER

1. Read about your "assigned" difficult customer

2. Prepare to share the
    a. **Characteristics** of your difficult customer
    b. **Feelings** or challenges for YOU
    c. **Strategies** you use to effectively communicate with them

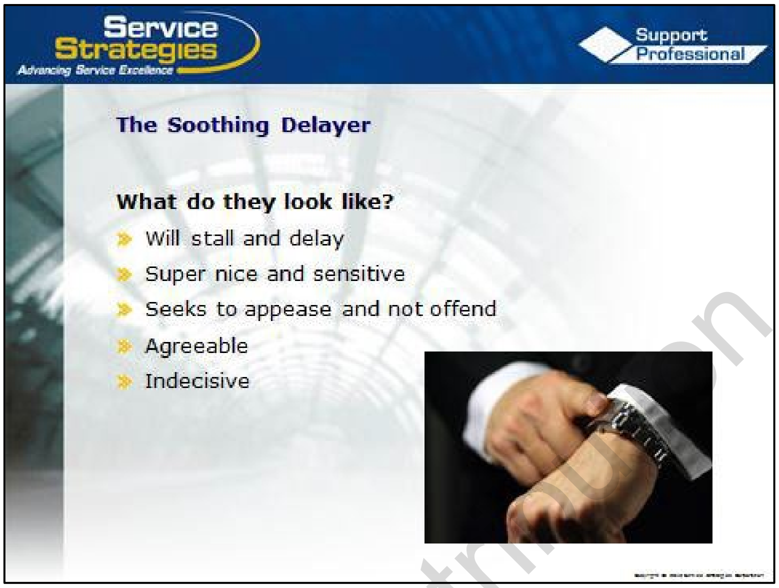
The Reluctant to Speak: This person is reluctant to tell you details of their problem. Is it annoyance over the inconvenience the problem has caused them or are they genuinely incompetent?

Feelings or challenges for you:

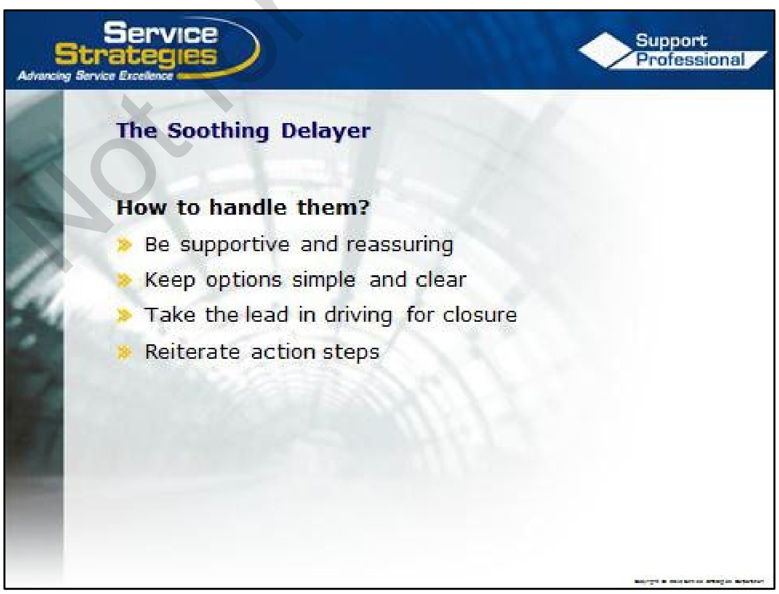


Additional Strategies:

The Soothing Delayer: This customer may be a Learning Level 2 who is embarrassed about their incompetence and wants to hide that fact by being indecisive.

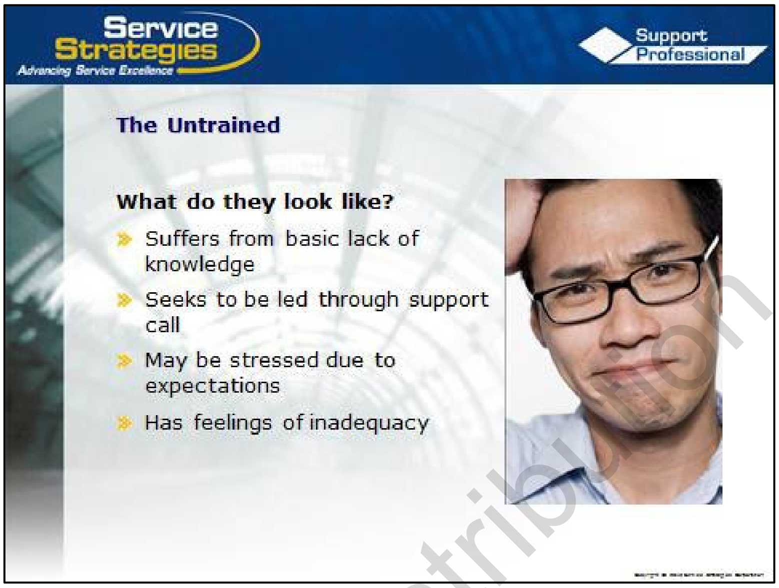


Feelings or challenges for you:

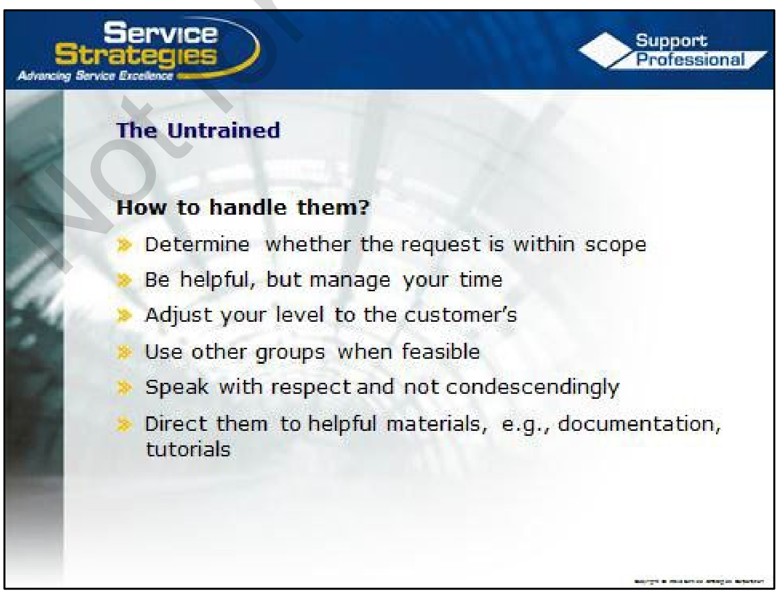


Additional Strategies:

The Untrained: This is typically a Learning Level 1 or 2 who needs help and knows it. The customer lacks knowledge and is extremely agreeable to your lead and accepting of your suggestions.

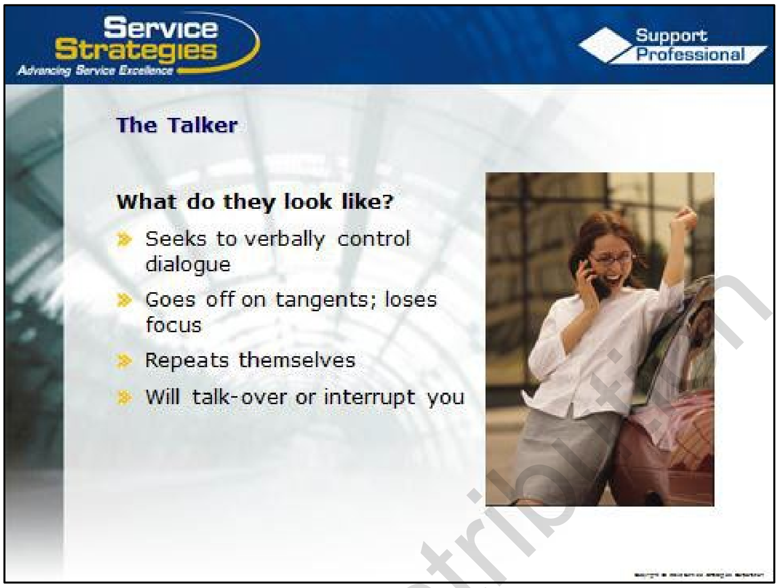


Feelings or challenges for you:

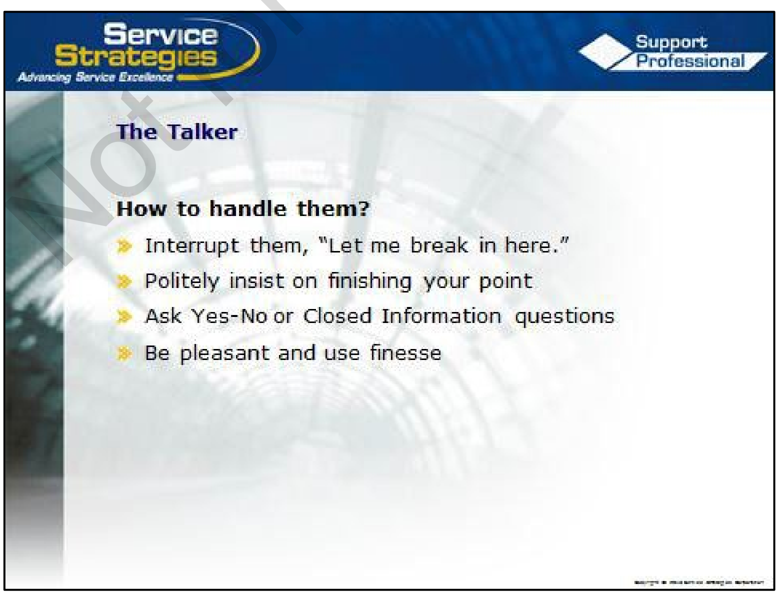


Additional Strategies:

The Talker: This customer may be a Learning Level 3 or 4. The challenge is that this customer is so busy talking, or planning what they want to say next, that they don't listen to you when you do speak.

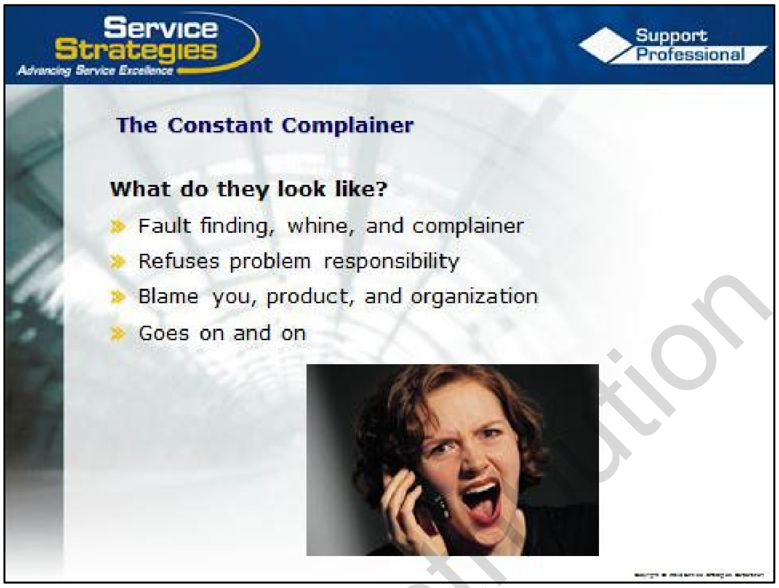


Feelings or challenges for you:

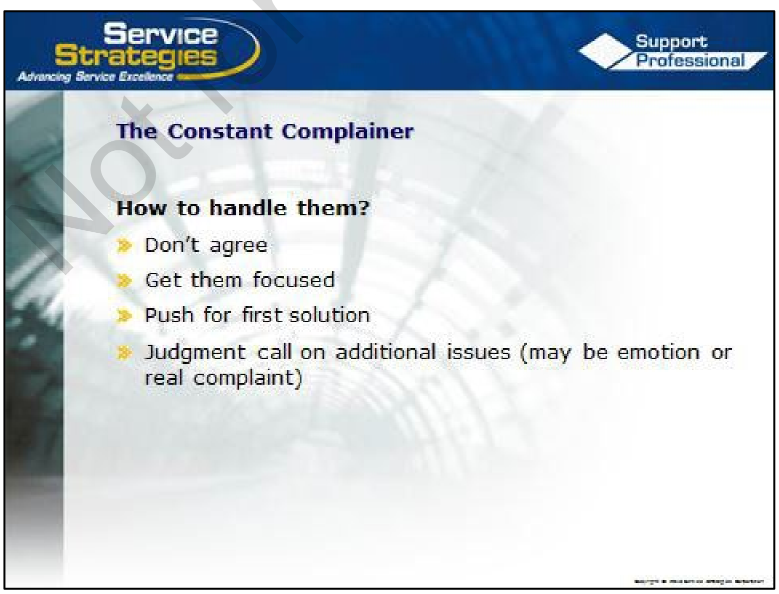


Additional Strategies:

The Constant Complainer: This customer is looking to place blame. The customer's willingness to talk provides the opportunity for you to check for consistency in their story. Is the issue based on fact or emotion?

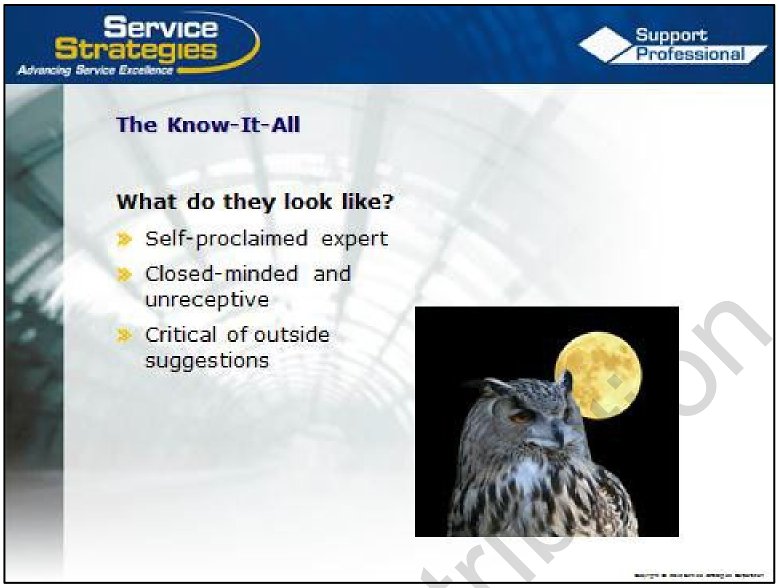


Feelings or challenges for you:



Additional Strategies:

The Know-It-All: This customer may be a Learning Level 4. They are impatient with troubleshooting questions and can be difficult to talk to.



Feelings or challenges for you:

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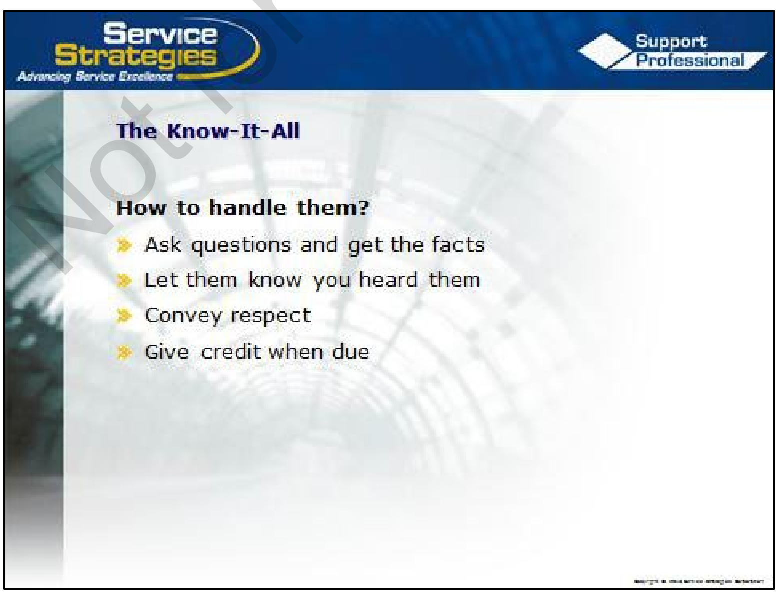

Additional Strategies:

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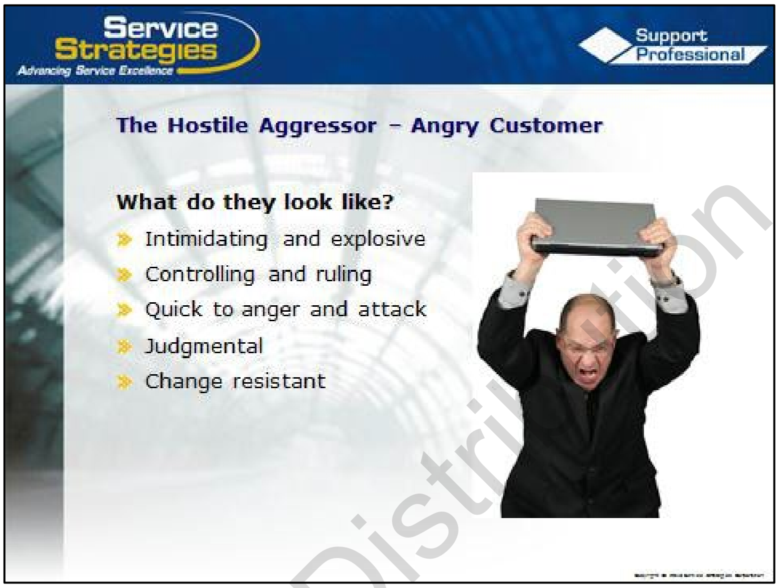
The Hostile Aggressor: This customer is filled with emotion and anger. It is important to take a structured approach to gain control of the call. As you maintain your emotional calm and consistency, the hostile aggressor customer will realize that you are the one in control, will calm down, and yield authority to you.



Feelings or challenges for you:

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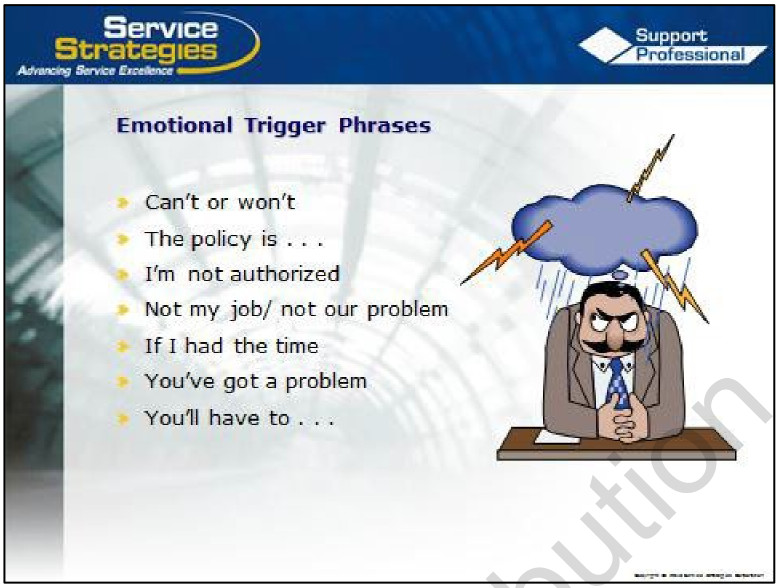
VIDEO – ANGRY CUSTOMER

As you watch the video clip titled “Angry Customer,” answer the following questions:

What things did Carlos say to further increase Warren’s anger level?

What could Carlos have done better during this conversation?

What did Angela do or say to make this call successful and diffuse Warren’s anger?



The angry customer is in a fragile state, even after defusing their emotions. All the hard work of calming the caller can be reversed with the use of the wrong phrase.

Avoid the following negative phrases:

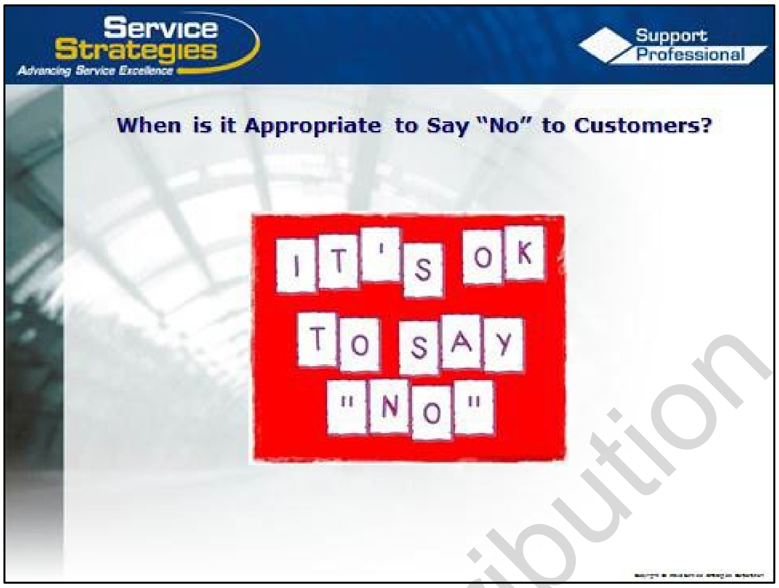
- I can't or won't
- The company policy is…
- I'm not authorized to….
- It is not my job to….
- If I had the time…
- You've got a problem….
- You'll have to….

Use the following positive phrases:

- We can do…
- I can help you with ……
- Together we can……
- Let me do….
- We need to
- Let me see if I understand what you just said…..

You'll be able to turn an entire support call around by not engaging in negativity, and by staying focused on the problem and what you can do to help the customer to resolve it. Positive phrases are tools that help you accomplish this.

When and How to Say "No"



Circumstances do occur when it is necessary to tell the customer "no" and awareness of them will help you be prepared.

Here are some examples:

- Not entitled to support
- Requesting assistance for a product version that is "unsupported"
- Proprietary information (e.g., documentation, source code)
- Product that is not supported by your company
- Anything illegal
- Modification/customizations to the standard product
- Request is out of your scope
- Some training requirements
- Speak with Development/Engineering
- Want your direct or home phone number
- Policy prohibits giving the customer what they want

What customer request do you find most difficult to say "No" to? (Select one from above or write one of your own)

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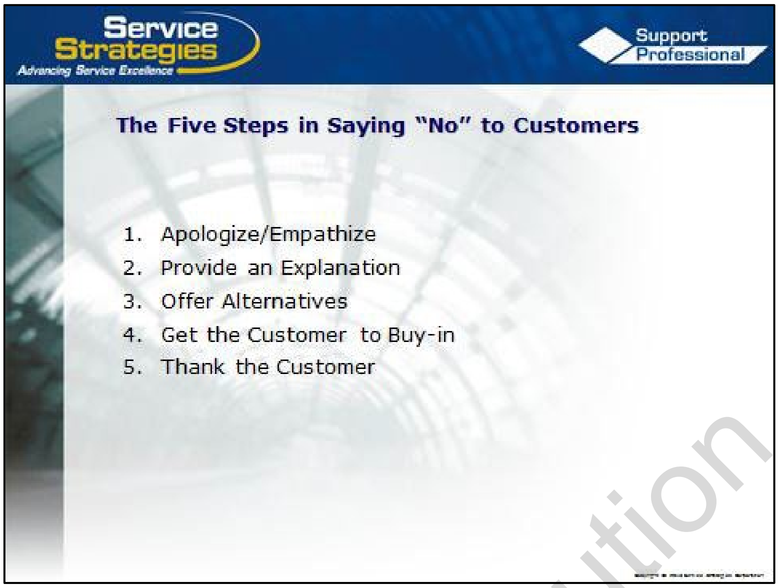

There is an effective approach to telling the customer "no" that you should utilize. Some people find this difficult to do, but the approach will help you stay on target.

Apologize/Empathize – You can tell the customer "I'm sorry" or "I understand" without taking responsibility for any problem or failure related to the request. It is a universally accepted statement that you recognize there will be some disappointment.

Provide an Explanation – Give the customer a description of your position on the matter and the "why" behind the "no."

Offer Alternatives – You don't actually have to say "no" to the customer in many instances. You can often offer an alternative, e.g., Professional Services or another vendor, who can assist them.

Get the Customer to Buy-in – It may be necessary to "sell" the customer on your recommendation. Tell them the benefits, use a third party reference ("this is what XYZ Company did."), or describe What's In It For Them.

Thank the Customer – Acknowledge and thank the customer for their consideration and acceptance of your explanation and recommendation.

We want to keep the conversation positive and try to help the customer achieve their business objectives whenever possible. Rather than telling them what you CANNOT do, it is better to tell them what you CAN do.

ACTIVITY – SAYING "NO"

Using the five steps, write a response to the situation you wrote down on the previous page.

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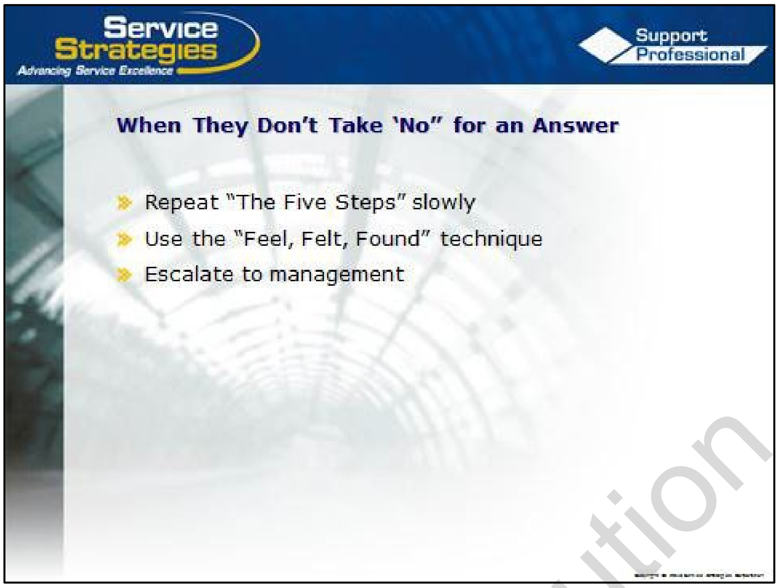


You can do your best to give the customer an alternative to their request, but they don't always accept it. Now what do you do?

The customer may "tune out" when you say, "I'm sorry" and begin to offer your explanation. When they don't accept your solution, you might try **repeating "the Five Steps"** slowly by using different explanations and paraphrasing to help them see your point of view from another perspective.

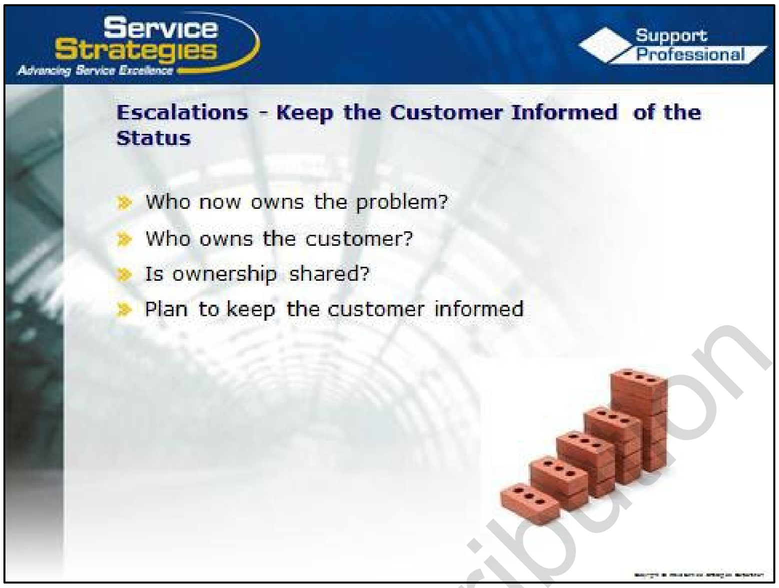
It may be helpful to use the **"Feel, Felt, Found" technique**:

"Mary, I understand what you're saying, and if I were in your situation, I'd want the solution quickly too. What we find though, is that the Consulting group has the expertise to do this task and you'll get the best result with them."

When all your attempts fail and the customer is still not happy with you, **escalation to management** may be required. In fact, they may ask to speak to a manager.

Don't give up when your attempt at saying "no" fails initially. Be persistent and repeat the steps using empathetic techniques to make your point.

Escalations



Escalating the customer's situation in a professional way is a key process that you utilize in your job. The criticality of the situation and the emotional state of the customer must be effectively managed to achieve success.

No matter what your company's escalation process, the most important step is **keeping the customer informed of the status.** This is an area of technical support that is sometimes weak. You need to do a good job of setting customer expectations and then keeping them notified. It should be clear within your organization as to who owns the problem and who "owns" the customer and will keep them informed.

Frequently, escalation issues cross product, technical level, or organizational boundaries. These issues can fall into the "black hole" between the entities unless it is clear as to problem and customer ownership.

The plan of communication should be discussed with the customer. Are you going to update them on the status hourly, daily, weekly, etc? You need to determine this plan and then be committed to it.

This is a critical piece of customer management. Too frequently, customers are "kept in the dark" as to what is happening with their issue. This can result in more time spent on dealing with emotions and anger and the situation can get worse.

MODULE 8 REVIEW QUESTIONS

1. Explaining the consequences of withholding information is a strategy for handling which type of difficult customer?
    a. The Talker
    b. The Untrained
    c. The Reluctant to Speak

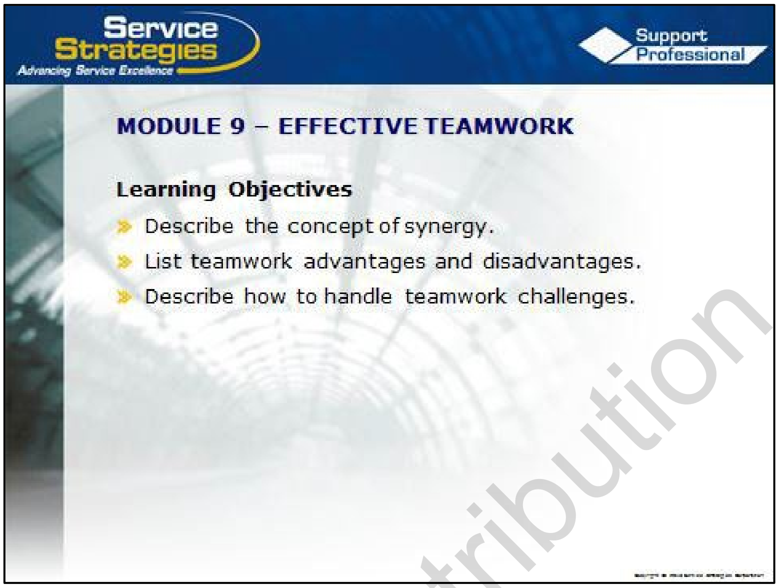
2. Time is one of the Negotiation Points of Leverage.
    a. True
    b. False

3. Customer complaints can provide you with insight into your customer's true perception of your service.
    a. True
    b. False

4. Your negotiating partner begins with a reminder that his company spends a great deal of money on your products and that your failure to meet his demand will cause a loss of revenue for your company. Which tactic is being used?
    a. Flinch
    b. Standard practice
    c. Deadlines
    d. Good guy/bad guy

5. The phrase "Our policy is" represents which type of trigger phrase when working with customers?
    a. Negative
    b. Positive

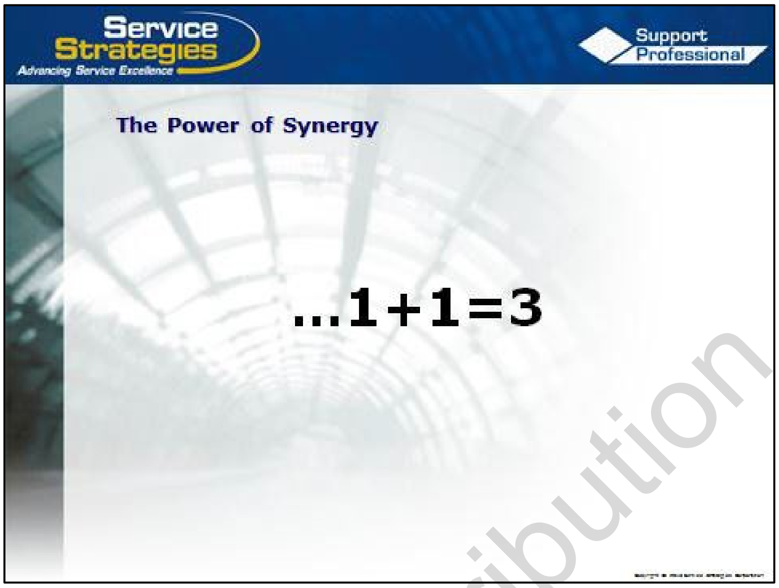
MODULE 9 – EFFECTIVE TEAMWORK



Learning objectives for Module 9 – Effective Teamwork:

- Describe the concept of synergy.
- List teamwork advantages and disadvantages.
- Describe how to handle teamwork challenges.

The Power of Synergy



If, as the saying goes, “Two heads are better than one,” then the question is, “Why don’t we use teamwork more and what are the benefits?”

Our interaction with customers is a one-on-one process, but no one can answer all questions or solve all the problems all of the time. For the sake of the customer, you should utilize the synergies of your team to extend your capabilities far beyond your personal boundaries.

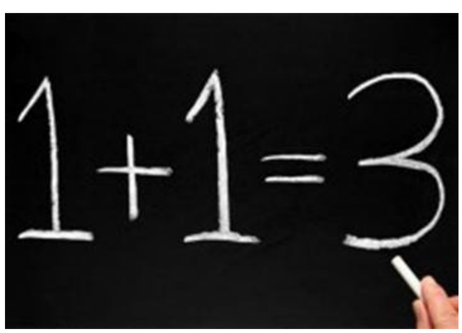
Synergy, or the combined effort of the team, means that 1+1=3. The result is greater than the sum of the parts.

ACTIVITY - SYNERGY

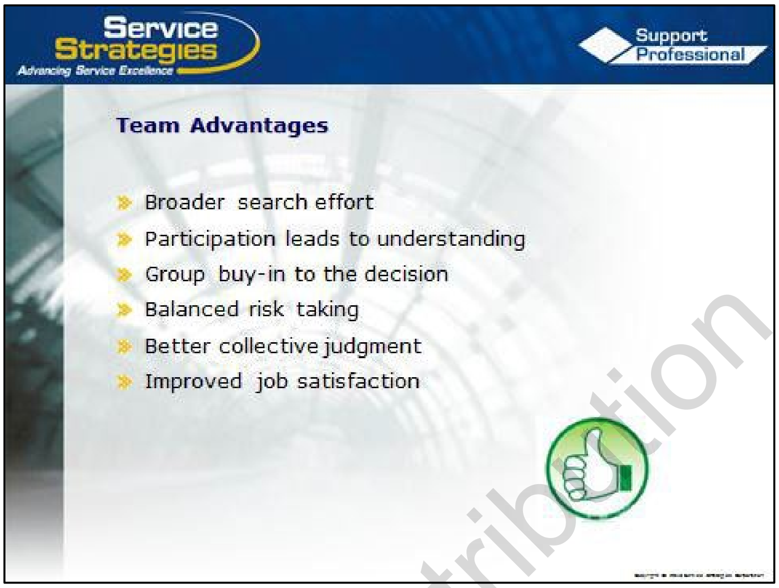
Using a letter provided by the instructor, make a list of as many four letter words as you can that begin with that letter. Be prepared to share this list with the group.

In sharing the list with the group, it should become apparent that many more words were created collectively than what any one person was able to list. This, of course, demonstrates the power of synergy, or working together.

By working with other contributing support professionals, productivity can be achieved far in excess of individual effort.



Team Advantages and Disadvantages



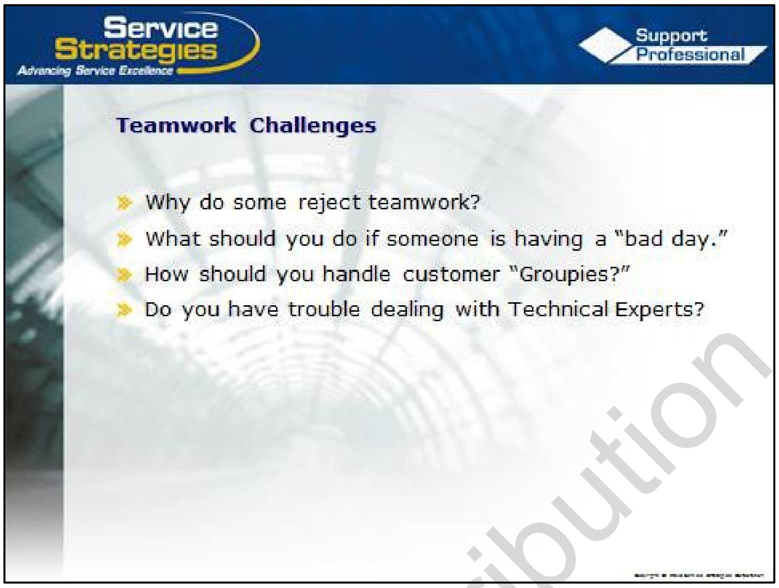
There are definite advantages to working together as a team. Recognize opportunities to take advantage of these factors.

- **Broader search effort** – More ideas are generated in brainstorming.
- **Participation leads to understanding** – In the process of discussing the issues, there is a better understanding of all the pros, cons, and success factors.
- **Group buy-in to the decision** – The team members are more likely to accept the decision if they are part of the process.
- **Balanced risk taking** – All the risk factors are more likely to be considered in a team effort.
- **Better collective judgment** – The overall judgment in making a decision will be better because of the synergy that is created.
- **Improved job satisfaction** – For many people, working together results in an improved attitude about our organization.

We must consider the disadvantages of working together as a team in the decision-making process and address these factors.

- **More time needed for decisions** – You should recognize that in decision-making it would take longer to discuss all the views. In troubleshooting though, time can be saved.
- **May take too long to reach consensus** – Getting everyone to agree and accept the decision can be time-consuming. Sometimes the time it takes can negate the advantages of teamwork. Customers may not wait!
- **Pressure to conform** – There will at times be pressure on those who don't agree with the majority view.
- **"Group think" may occur** – When we all start "going along" with the rest of the group without expressing our personal views or adequately discussing the concepts, we are in a "group think" mode. This will not result in a good decision.
- **One person may dominate** – When one individual takes over the team because of prior experience, expertise as a result of specialized training, or personality (dominance) factors, the team may transfer the decision-making authority to that individual and synergy will not occur.
- **Superior individual makes better decisions** – When there is an individual who truly has specialized knowledge, experience, or training that does apply, they can potentially make a better decision.

Teamwork Challenges



<u>While we want to realize the benefits of working together as a team, sometimes there are challenges.</u>

- **Why do some reject teamwork?** Not everyone on your team is a team player. Some are insecure and thus desire to retain their specialized knowledge. The knowledge they have is perceived as POWER to them when in reality it would have more power if shared with the whole organization. Efforts should be made to identify their issues and help them under-stand the value of teamwork.

- **What should you do if someone is having a bad day?** When one of your peers is having a bad day, you can tell. What should you do? You could leave them alone, but this may not resolve the problem on a timely basis and YOU may be the next person to talk with the customer they just encountered or YOU may get into a confrontation with them. Perhaps, if you don't have a good relationship with them, someone else on your team does and can try to help them out.

- **How should you handle customer "Groupies?"** Customer "groupies" want to talk with one person. While we use processes to try to avoid this, some customers are very creative and find a way (possibly using a previous case number). How should you handle it? One of the best ways is to talk to them about the BENEFITS of using resources from the whole organization.

- **Do you have trouble dealing with Technical Experts?** Technical experts are very busy and aren't always team players. This can be made worse if you are relatively new to the organization and they've heard your question 10 times before. Respect their time, take notes, and do some homework before going to them. In some instances, you can help them out, too.

You must overcome the challenges of teamwork to be successful.

MODULE 9 REVIEW QUESTIONS

1. "The result is greater than the sum of the parts" is the definition of synergy.
    a. True
    b. False

2. "Group think" can be defined as:
    a. Taking a long time to discuss all views
    b. Putting pressure on those who don't agree with the majority view
    c. Expertise as result of specialized training
    d. Going along with the rest of the group without expressing personal views

3. Which of the following is NOT a team advantage:
    a. Balanced risk taking
    b. Improved job satisfaction
    c. More time needed for decisions
    d. Broader search effort

4. When a customer calls in and wants to talk to a specific person, this is called:
    a. Synergy
    b. Group think
    c. Customer groupie

MODULE 10 – PERSONAL PRODUCTIVITY

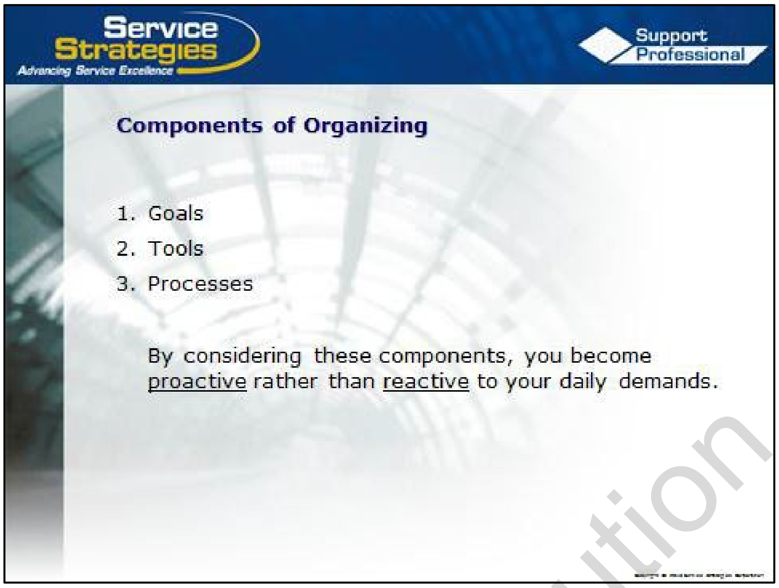
Learning objectives for Module 10 - Personal Productivity:

- Organize daily activities into goals, tools and processes.
- Write goals in SMART format.
- Describe tools available to categorize and track activities.
- Follow designated processes to complete daily tasks.
- Identify the factors that lead to job burn-out.
- Identify techniques to eliminate stress.

Basic Organization and Productivity

This section will address time management issues and methods to successfully accomplish daily and long-term tasks. In the world of customer support this is a daily, if not hourly, process, but it can be managed in this fast-paced environment with focus on goals, tools, and processes.

"You'll never get there if you don't know where you're going".
-Robert Mager



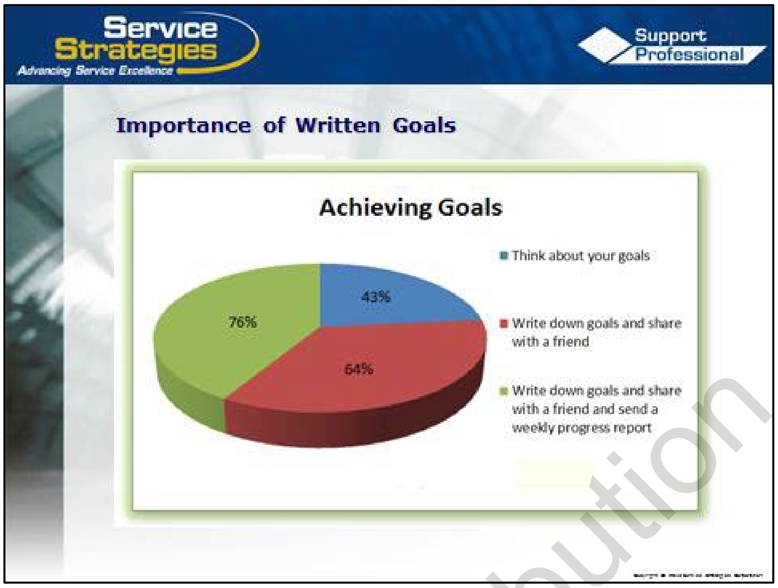
The ways in which support professionals organize and prioritize their activities will have a significant impact on efficiency and productivity.

The greatest challenge in time management is developing a plan that will help to structure a busy schedule and at the same time be flexible enough to be practical in a support environment. Consideration of goals, tracked with available tools, and organized into designated processes, can provide that structure.

Planning is an ongoing process consisting of the following components:

- **Goals** – Set goals that are specific, measurable, achievable, realistic and timed.
- **Tools** – Use tools to track goals and activities.
- **Processes** – Follow an organized process to determine what actions need to be taken and who should take them.

A plan that includes goals, tools and processes is essential in keeping a hectic day from becoming an overwhelming one.



Psychology professor Dr. Gail Matthews conducted a study that showed if people wrote down their goals, shared this information with a friend, and sent weekly updates to that friend, they were on average 33% more successful in accomplishing their stated goals than those who merely formulated goals.

Matthews recruited 267 participants from around the world in a wide variety of businesses, organizations, and networking groups. The participants were assigned to one of five groups:

- Group 1: Simply think about the goals they hoped to accomplish
- Group 2-5: Write their goals
- Group 3: Write their goals and action items for each goal
- Group 4: Write their goals, action items and share these with a friend
- Group 5: Write their goals, action items, share with a friend and send a weekly progress report to a friend

Of the original 267 participants, 149 completed the study. These participants were asked to rate their progress and the degree to which they had accomplished their goals.

At the end of the study, the individuals in Group 1 only accomplished 43% of their stated goals. Those in Group 4 accomplished 64% of their stated goals, while those in Group 5 were the most successful, with an average of 76% of their goals accomplished. **This study shows the effectiveness of accountability, commitment and writing down one's goals.**

SMART Goals

How do you begin to develop goals? Set observable, measurable goals that provide a clear picture of what you need to accomplish. Set S.M.A.R.T. goals:

S — **Specific:** State exactly what you want to accomplish by using an action-oriented verb.

M — **Measurable:** How will you demonstrate and evaluate the extent to which the goal has been met?

A — **Achievable:** Goals should be challenging yet attainable. Is the goal within your control and influence - is it feasible?

R — **Relevant:** How does the goal tie into your key responsibilities? How is it aligned to organizational objectives?

T — **Time-bound:** Set one or more target dates for successful and timely completion. Include deadlines, dates and/or frequency.

ACTIVITY – GOAL SETTING

Evaluate the following goals and determine if they are SMART. Check the appropriate boxes if the goal is Specific, Measurable, Achievable, Relevant, and Time-bound.

Goal	S	M	A	R	T
"Close an average of 8 calls every day."					
"Teach training classes for all new support professionals."					
"Write one new knowledge document every month."					
"Attend the xxx course by the end of Q2."					
"Email weekly status updates to each client by 4pm every Friday."					

Time Management Tools

Using tools to organize daily tasks and goals helps to identify tasks, prioritize them, and organize them so they become manageable, rather than overwhelming.

Some tools you may use include:

- Call tracking system (CRM)
- Email/Outlook
- Paper/sticky notes
- Day-Timer

What additional tools are available to help manage your tasks?

Managing Your Tasks

	Urgent	Not Urgent
Important	I – Manage i.e. Crisis, pressing problems, time bound deadlines	II – Focus i.e. planning, prevention, exercise, relationship building
	Quadrant of Necessity	**Quadrant of Quality & Personal Leadership**
Not Important	III – Avoid i.e. interruptions, some emails etc.	IV – Avoid i.e. mindless TV, trivia/busywork, time wasters
	Quadrant of Deception	**Quadrant of Waste**

Effective time management requires a lot of discipline. *__In Stephen Covey's 7 Habits of Highly Effective People__*, he cited a Time Management Matrix which could be a guide for everyone.

Quadrant I - Urgent and Important: There are two types of tasks here, the ones that you could not foresee and the ones you've left to the last minute. You can avoid the latter by planning ahead and not procrastinating! For those tasks that are unforeseen, the best approach is to leave some time in your day to handle unexpected issues. Know that there may be instances where the crisis causes you to reschedule other tasks.

Quadrant II – Not Urgent, But Important: These tasks help you achieve your goals and complete important work. Make sure that you have plenty of time to do these tasks so they do not become urgent.

Quadrant III - Urgent and Not Important: These tasks keep you from achieving your goals and completing your work. Ask yourself if these tasks can be rescheduled or delegated. A good example of this type of activity is interruptions from other people. This is where saying "No" is valuable!

Quadrant IV – Not Urgent and Not Important: These tasks are distractions and should be avoided if at all possible. Some can simply be ignored or even cancelled. Another area where saying "No" will be beneficial.

<u>For maximum results, Covey suggests:</u>

- Tasks in Quadrant I should be done first, then Quadrant II, III and IV.
- Avoid spending time in Quadrant IV.
- Spend more time in Quadrant II.

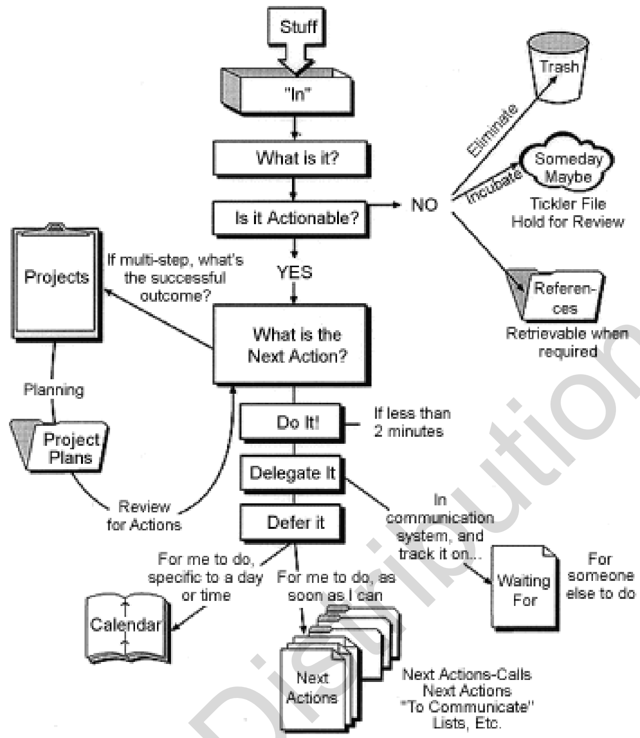
Planning right and getting things done earlier will help you avoid problems in your life.

ACTIVITY – TIME MANAGEMENT

For each of the four quadrants, list 1-2 tasks that you encounter on a typical day.

	Urgent	**Not Urgent**
Important		
Not Important		

Process of Organizing



Without a process in place to accomplish the daily tasks, they become disorganized, overwhelming and impossible to complete. The process helps determine the steps to take for completion as well as who may be most appropriate to complete them. Remember to use your team for support and expertise.

David Allen, author of the book "Getting Things Done," has created a process that can be very effective in the customer support environment.

<u>Note some key steps:</u>

- What is the activity?
- Is it Actionable - check the priority (which Quadrant is it in)?
- Next action – If a project, plan it, if a task, decide the next action.
- Determine what tool to use.
- Decide who should complete the task.

Using a process is critical to task completion. It not only tracks the task, but also determines the most efficient way to complete it. Again, use your team's synergy for increased productivity.

Stress Management

Stress, which can sometimes lead to job burnout, is the #1 reason why support professionals leave the technical support industry. Although the factors that cause the stress are an everyday occurrence, your job burnout can be minimized or eliminated by understanding how burnout occurs and then engaging in stress relieving activities.

Stress and the burnout it causes not only leads you on a path that could result in your quitting or losing your job, but also do tremendous damage to customers and your company along the way.

> *"The greatest weapon against stress is our ability to choose one thought over another."*
>
> *-William James*

Components of Stress

Every job contains a certain amount of stress. We need some stress to stay stimulated and challenged on the job, this is considered positive stress. Too much stress, however, can lead to job burnout, which is negative stress.

<u>The following are the components of stress and the strategies to deal with them:</u>

- Too much demand and not enough time to meet it
  - Strategy: Effectively handle demands
- Too much responsibility and not enough control
  - Strategy: Building control
- Too much caring and not enough detached concern
  - Strategy: Develop detached concern
- Too much stress over an excessive amount of time
  - Strategy: Deal with your stressors of long duration

By understanding the things that cause the stress, you can begin to implement these strategies to counterbalance them.

Because demand and time are two factors that contend with each other daily, it is important that you develop tactics to balance the two.

Sometimes you become overwhelmed and burned out because you lack practical skills that can help your job become more manageable. Instead of changing your job, your customer, your boss, or other people, you should focus on yourself.

- **Prioritize your case management** – Make sure you are clear on the priorities and the commitments that have been made; keep a record of WHEN you told the customer you would respond.
- **Manage talk time effectively** – You can spend too much time with a customer, especially with the Untrained or Talker i.e. waiting for them to do a process or giving them information beyond the need of the situation.
- **Set limits for what you can do** – Recognize your limits; sometimes you must say "no" or "not now" to maintain your stress levels within your limit.
- **Communicate effectively** – Make sure you are clear about your commitments and your priorities. Set the customer expectations and establish priorities and clear work agreements with your manager.

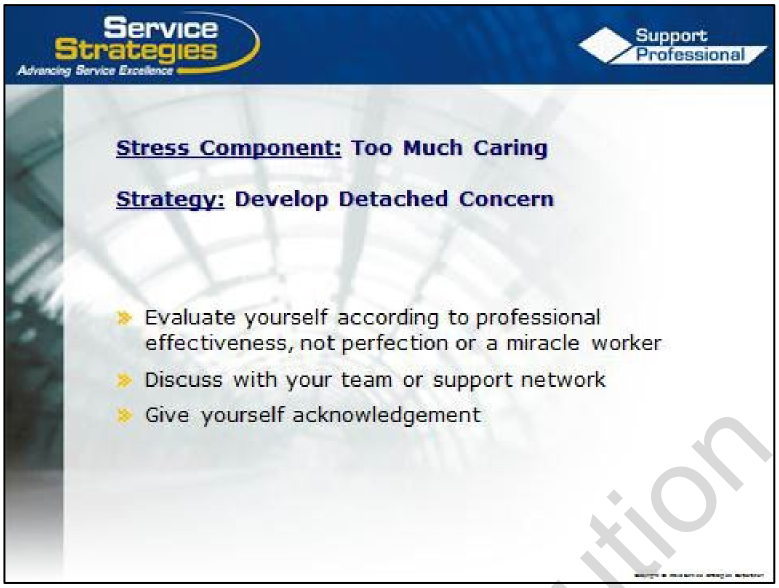
> ***"Until we manage TIME and the demands it places on us, we can manage nothing else."***
>
> ***– Peter Drucker***

The job of technical support is sometimes difficult to control. Demanding customers and priority changes are a normal part of our workday.

Here are some suggestions on how to build control:

- **Tackle tough problems when you are fresh** – Sometimes it is better to work on tough problems when you are most productive. For some that is in the morning and for others that is in the afternoon. You may also want to set aside the problem for a short period of time when you feel you are not making any progress.
- **Try to control interruptions** – When you are interrupted and lose focus, you need to manage these distractions by going to another location, specifying your available/unavailable times etc. Try to limit your interruptions to 2 minutes, after that you are getting sidetracked.
- **Volunteer for tasks you feel are important and challenging** – Do a task that gives you satisfaction and challenges you. Of course you can take on too much and you must guard against this.
- **Try to keep your life in balance** – Be aware of your life space. Do you have enough areas of interest and involvement or too many? Variety helps us to sustain our effort, but too much is overwhelming.

We must accept a certain high level of interruptions and the lack of control in the job of technical support. On the other hand, you need to also take action to try to neutralize the stressful effects of this.



While you certainly care about your customers, your job, and your responsibilities, you must take care of yourself. If you are a "relationship" energy person, you need to be especially aware of the impact upset customers will have on you.

A key skill to prevent burnout is to literally "let go" and develop detached concern. You care, but you cannot let the stress harm you. When you react and view situations emotionally, you make poor decisions.

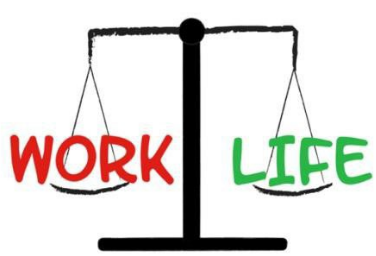
<u>Try the following techniques to overcome "too much caring:"</u>

- **Evaluate yourself** – Don't expect perfection or to be a miracle worker. Let go of how you would like things to be and accept things as how they are.
- **Discuss with your team or support network –** These are people that make you feel good, make your life easier and can help you during times of trouble.
- **Give yourself acknowledgement** – Don't be so hard on yourself. Accept who you are and celebrate the accomplishments and contributions you've made.

Most of us can handle immediate challenges; it is the prolonged demand upon us that can pose a threat to health and job satisfaction.

Here are some techniques to help deal with stressors of everyday life:

- Find time to relax
- Regular exercise
- Nutritious, high performance diet
- Look for humor in situations



<table>
<tr><td>Too much demand/Not enough time
Work load increases, I work harder. The work load increases again. I never seem to catch up.
Demands from several different sources create conflicting goals and priorities. I spin around in circles trying to get through the day.
I just don't have enough support to get my work done well.</td><td>What can you do?
Prioritize
Manage time well.
Get clear on objectives.
Practice good communication skills.
Analyze problems.</td></tr>
<tr><td>Lack of control
I support many different areas and people, and am constantly "on call." I wind up having to react to situations.
I am caught between my customers and the policy makers at work. I feel pressured by both sides.
I am constantly interrupted and find it difficult to complete a task when I would like to.</td><td>What can you do?
Schedule your work tasks to fit the peaks and valleys of your energy.
Volunteer for tasks you feel are important and challenging.
Switch activities more frequently.
Tackle tough problems when you are fresh. Let them rest when you know you can't think clearly.</td></tr>
<tr><td>Too much caring
I tend to "take my work home" and worry about clients or problems after hours.
I feel badly when I have to disappoint someone, even when it isn't my fault.
When I have to say "no" to someone, I often feel guilty.</td><td>What can you do?
Evaluate yourself according to your professional effectiveness, not your ability to work miracles, or achieve perfection.
Bounce tough situations off a colleague who can give you an objective reading.
Practice giving yourself acknowledgement for our accomplishments and contribution. Make a list if you have to!
Develop detached concern.</td></tr>
<tr><td>Stressors of long duration
I don't foresee any let up in the immediate future.
I get into a rut at work and can't seem to dig my way out.
It seems as if the pressure will never end. It's one thing right after another.</td><td>What can you do?
Use your morning and evening commute times to relax and clear your mind.
Discipline yourself to exercise regularly.
Take time to follow a nutritious, high-performance diet.
Look for the humor in situations.</td></tr>
</table>

MODULE 10 REVIEW QUESTIONS

1. Which of the following is NOT a component of stress or job burnout?
   a. Detached concern
   b. Lack of control
   c. Too much caring

2. One key to dealing with stressors is to look for humor in situations.
   a. True
   b. False

3. SMART can be defined as:
   a. Strategic, Meaningful, Attainable, Relevant and Time-bound
   b. Specific, Meaningful, Attainable, Relevant and Tedious
   c. Specific, Measurable, Achievable, Relevant and Time-bound

4. Stephen Covey recommends that you spend most of your time in Quadrant I – Urgent and Important.
   a. True
   b. False

5. There just doesn't seem to be enough time to get everything done. I am constantly feeling out of control and behind. What can be done to remedy this?
   a. Assign projects and problems to individuals rather than teams to avoid the problem of disagreement that often stalls the team process
   b. Implement a plan that utilizes goals, tools, and processes
   c. This is a reality of the support center world and the only remedy is to hire more staff

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