Workbook 1 - Communicating professionally in a customer service environment

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<td>Learner:</td>
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<td>Assessor:</td>
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Welcome!

This workbook has been designed to support your learning within the workplace and to provide you with a reminder for top tips, skills and knowledge you have gained along the way for your day-to-day role.

It has been written to assist you and should not be relied upon to complete the qualification.

Your Assessor will be reviewing the workbook. It will be used as part of the assessment process for one of your core units for the qualification in conjunction with being observed to see that you are applying the knowledge within your role. You may also be asked to elaborate on the answers you have provided in the workbook through discussion with your Assessor, and you could also be asked to provide further supporting evidence to ensure you meet the full criteria.

To ensure you meet the criteria of the qualification please answer the questions fully, providing as much evidence from your own role and workplace to support the answers you have given.

Additional notes pages have been allocated at the back of the workbook, enabling you to make notes when you have experienced a particular situation or found something that works well from the learning you have completed.
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Getting to Know You!

Introduce yourself and your company

**TASK**
Provide an overview introducing your company including information such as what it does, the number of employees it employs

What is your job title?  

Who is your line manager?  

Do you have previous experience in this role?  
If, so how much and where?
Who are the nominated First Aider and Fire Marshall/Warden for your company?

If there is a fire what is your company procedure, state the process below:

State what the process is for reporting an accident in your workplace
101 - Communicating using customer service language

1.0 - Why is customer service important for your organisation?

73% of consumers end a relationship due to poor service and the root causes are:
- Having to repeat information
- Feeling trapped in automated self – service
- Having to wait too long
- Interacting with staff who have no knowledge of the service history (or customer value)
- Unable to easily switch between communication channels

Source: Genesys Telecommunications Laboratories Report – The Cost Of Poor Customer Service

In your organisation what is meant by the term Customer Service?

Record your answers below:

Why is Customer Service important to your business?
Consider, why it is important & record your answers below.

Understanding what customer service involves is essential for your role, not in terms of an actual job description/role but in terms of what is expected from/of the parties involved when delivering & receiving it.
1.1 - Who is your customer?

You have established what customer service is and what it involves; you are now going to look at the most important factor in customer service: the actual customer.

Who are your customers?

Describe your “typical” customer:

What is an external customer?

Provide examples of your external customers

What is an internal customer?

Provide examples of your internal customers
1.2 - What are your customer needs, what do they expect?

The Institute of Customer Service has completed some research to understand what customers want/expect from an organisation and their service and/or product.

ACTIVITY – Identifying Customer Wants
Review the 10 pictures which reflect the Top 10 Customers Wants from the survey completed by the Institute of Customer Service. Score the images from 1 to 10, 1 being the top priority, 10 being the least in the boxes provided.

- FRIENDLINESS OF STAFF
- COMPETENCE OF STAFF
- BEING KEPT INFORMED
- EASE OF DOING BUSINESS
Considering your experience and knowledge, are there any surprises from this survey? Please list below, with examples and reasons.
State what your customers wants/needs are? Provide examples from your work place below

How do they decide on what they want/need from you? Providing examples from your work
1.3 - Customer Expectation

You have identified what your customers want. Your organisation needs to understand how your customers identify these wants which become their expectations. Understanding these expectations will enable your organisation to influence and maintain their customers and their expectations of the organisation, its products and services. Think about the customers you interact with & serve on a daily basis when answering the next section.

What do you think is meant by the term customer expectations?

**TASK**

With your colleagues and Line Managers, discuss what your customers expect from you & your organisation, record your discussion below:
Reflecting on your customers expectations and thinking about the experiences you have with your customers provide examples for the following;

Provide an example of a time when one of your customers had mentioned they were impressed with your company.

Identify what impressed them and why?
Provide an example of when a customer/s have been annoyed with your company

Identify what annoyed them and why?
ACTIVITY - Demonstrate your understanding of your customer expectations

Take a real life example from your place of work. How would a customer decide on buying something from your company, what forms their expectations from their wants/needs and how do they make their decisions?

<table>
<thead>
<tr>
<th>Customer Expectation</th>
<th>Information they would use to form expectations &amp; why?</th>
<th>Where they would source that information</th>
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<tbody>
<tr>
<td>e.g. They want to buy a mobile phone but can only afford a £30 per month contract, due to restricted budget.</td>
<td>e.g. They would look at contract offers at the time from network operators. Most accurate information to use against the budget they have to spend</td>
<td>e.g. Network operator high street shop, product catalogue online, friend has the same contract &amp; is happy</td>
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1.4 - Supporting Your Customers with their Specialist Needs/Requirements

How your customer is treated by you and your organisation will heavily influence whether or not they return. Customers expect organisations to meet their needs and special requirements. It is important to establish what is meant by special requirements and how they can be supported by you and your organisation.

Specialist Customer Requirements
List the types of special requirements your customers have or may have

What could be the impact on your organisation for not supporting the special requirements of your customers?

How do you and your company support your customers and their specialist requirements?
Providing an example from work, how & why would you adapt your behaviour and communication style to meet a customer’s need?

How can your behaviour/communication style affect a customers experience with you & your organisation?
Your Organisation

**TASK**
Find out what your organisation structure is and create your organisational chart below, depending on the size of your organisation will depend on the structure continue on the next page if required.
1.5 - Identifying customer service roles within your organisation

Describe what a customer service deliverer does in your organisation

What is your role within the organisation and in relation to delivering customer service?
Using your organisational chart, identify and list below the individuals and their job roles who deliver customer service within your organisation.
1.6 - Customer Service Procedures

When interacting with customers it is important to maintain a consistent level of customer service in order to meet their expectations.

**TASK**
Research what your company customer charter is and state what your company procedure is for delivering customer service

Your Company Customer Charter:
How do you greet your customers?

________________________________________________________

________________________________________________________

________________________________________________________

Do you have a company policy/standard for meeting and greeting customers? If so, state what the policy/standard is and how you follow it?

________________________________________________________
Using examples from your work, explain why company procedures are important for you to follow in order to deliver effective customer service.
Record all the types of information you need to be able to deliver good customer service to your customers

Where is this information stored?
Customer opinion and levels of satisfaction are crucial to the success of an organisation. To be successful your organisation should ideally monitor how they are meeting and exceeding their customer expectations and satisfaction levels.

**TASK**
Find out if your organisation has processes in place to check/monitor the satisfaction levels of your customers? Provide examples of the types of processes they use.
Explain how customer expectations link to their level of satisfaction with customer service. Provide examples from your work place.
A team can be made up of lots of different personalities & skills, as team members we need to appreciate how our personal behaviours/personalities can impact on our teams.

TEAM = Together Everyone Achieves More

Think of the key skills you need to be an effective team player, list them below?


When delivering customer service, why is teamwork essential to delivering good customer service and satisfying customer need? Explain using personal examples from work
Stop! Before you dismiss last week’s customer complaint as unimportant, consider this: research by US firm TARP shows that for every 26 unhappy customers, only one will lodge a formal complaint with Management. The real concern, however, comes from the finding that an average of 1,560 people will hear about at least one of these unhappy customers' experiences. On average, each unhappy customer will tell 10 people, who in turn will tell 5 others. This finding makes for a compelling wake up call for businesses that take the task of collecting and responding to customer feedback lightly.
List the standard customer service problems you encounter in your work.

Considering your organisational chart identify who you should inform about the customer service problems you encounter in the work place.
ACTIVITY! – The Impact of Your Behaviour

Thinking about past experiences when delivering customer service for your company, creating a spider diagram record your answers to the following question:

How you react to a customer and a particular situation can either make the situation worse or calm it down.

How can your behaviour impact on your customer’s experience with you?
1.8 - Your Organisation’s Products and Services

Being effective delivering customer service means you should be positively promoting your organisation and you should know your organisations product range & service offers.

What is the difference between a product and a service? Provide examples to demonstrate the differences:

What products and services does your company offer? List them below:
What type of information do you need to give customers in order to deliver a good level of customer service?

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

How do you keep yourself updated with the company’s products and services?

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

Where do you source this information?

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
1.9 – Make a note!

Take some time to make a note of your top tips and learning outcomes gained during this qualification and your work experience.
Statement
All work completed within this workbook belongs to the candidate and all information provided is accurate and correct.

LEARNER SIGNATURE & DATE:

ASSESSOR SIGNATURE & DATE:

EMPLOYER SIGNATURE & DATE: