


Customer 1st Program Overview



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For ABC Corporation
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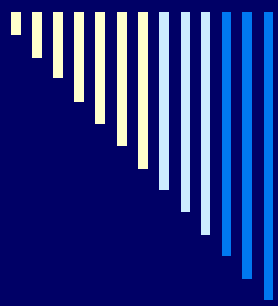
ABC's Ultimate Intent With Its
Customer 1st Program Is:

**Provide total and quality care
worthy of a premier global brand**



ABC's Goals for Customer 1st Program

- ❑ Offer world class Customer Service --- make it legendary
- ❑ Make Customer Service a key/strategic differentiator (and a competitive weapon)
- ❑ Make customer focus the linchpin of ABC's corporate culture (customer-centric culture)
- ❑ Turn Customers into Clients



For This Program To Succeed We Must Have Client Care/Service Core Competencies

□ ABC's Client Service Core Competencies:





Clarification

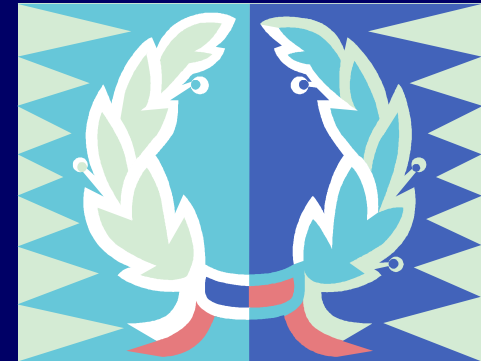
□ In our internal communications we will use the words of:

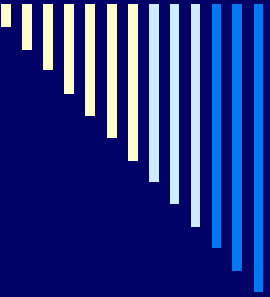
- Customer 1st Program
- Client Service or Customer Care
- Total Customer Experience
- Customer Delight or Customer Enthusiasm

... interchangeably, as if they are one and the same thing.

Key Ingredients To World Class Client Service

- ❑ Professionalism
- ❑ Respect
- ❑ Listening
- ❑ Solving
- ❑ Offering alternatives
- ❑ Being action-oriented
- ❑ Follow-through and follow-up
- ❑ Satisfaction
- ❑ Relationship building





What Do These Nine Words Collectively Mean or Imply To You?

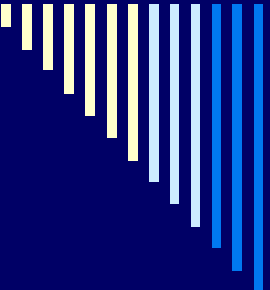




Question

□ Do these key ingredients apply to:

- Sales?
- Marketing?
- Creditor Relations?
- Contracts?
- Managers?
- All employees?



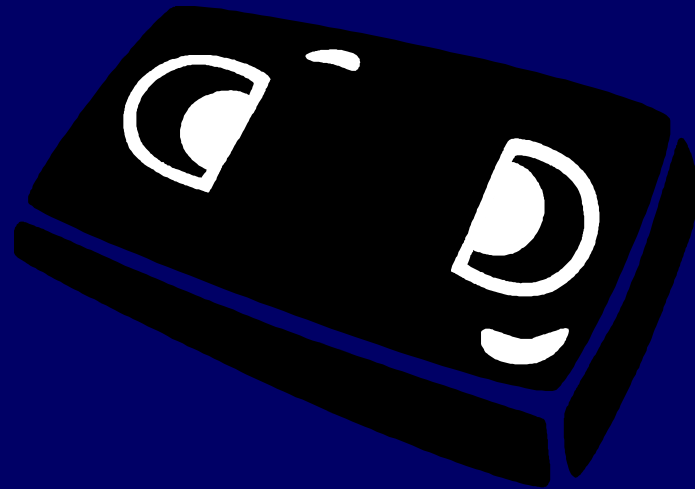
If The Answer Is Yes, Then What Does This Say About The Importance Of Client Service?

Client Service is not a department or a discipline, but what we do across all organizations, all the time!

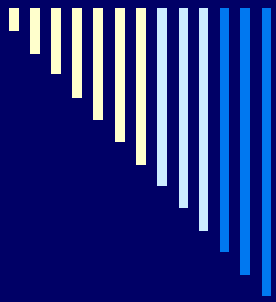
In a way, Client Service is every one, and everything we do in **ABC**.

Video Time

- “If It Weren’t For Customers” (22 minutes)



- Discussion/Debrief



So, What Is Your Personal Plan?

List 3 – 5 action items that you plan to introduce in your organization to improve Client Service:

- 1.
- 2.
- 3.
- 4.
- 5.

Memo: Make sure that the changes are noteworthy and lead to measurable gains



What Do You Need To Execute Your Plan For Your Department?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.



There Are 3 Options In Executing Your Plan

- ❑ Option 1: Do it alone --- you have the resources and skills to take care of the action items.
There are in-house courses that may help you and your people improve and progress
- ❑ Option 2: Seek the help of others --- may require forming a multi-discipline team that executes certain tasks informally or formally (in a project management setting)
- ❑ Option 3: Seek the help of outsiders (consultants).
This option is reserved for special projects only



Customer 1st Philosophy





Best Practices

1. Ensure that our website “listens”
2. Give customers what they want quickly

1. **ABC's** Customer 1st Program offers surveys and e-mail feedback to both prospects and customers
2. Responsiveness and immediacy are keys to success



Best Practices

3. Make Client Service resources easy to find and easy to use.

Give clients an indication how long it will take to hear back from you

3. ABC's website has a link for Client Service

Be sensitive to the stress that our customers are feeling



Best Practices

4. Provide multiple contact channels

- e-mail
- Phone
- Web self-service
- Live chat
- Face-to-Face

4. **ABC** today offers only two channels (e-mail and phone), but it is planning to add more channels in the future (especially Social Media)



Best Practices

5. Pay attention to the 80% - 20% rule (80% of all questions are aimed at 20% of the content)

5. ABC today is trying to address content questions either through the two channels that were mentioned in the last slide, and through the industry's most robust Learning Center



Important Note

- The 80% - 20% rule is also known as Pareto's Curve or the "vital few, trivial many" rule. This rule applies to many other things besides Customer Service, such as:
 - 20% of customers generate 80% of revenue (this will become evident when ABC becomes a full service provider in the financial services arena)
 - 20% of customers create 80% of the havoc in terms of complaints, late payments, and dropping out of the program



Best Practices

6. Let clients rate you (because you cannot improve what you cannot measure)

6. **ABC** is planning to add this feature in the future. There are two ways to rate us:

- Online
- Direct Mail

Reminder: Disgruntled customers rate us when they ask to speak to “the boss”



Best Practices

7. Leverage your knowledge Base across all customer channels

7. **ABC** will consider this option when it implements a new CRM system (well beyond Telemagic)

The new CRM system will allow us to perform data mining and collect intelligence for future products and services



Why Intelligence Is Critical

- In order to build new products and services, we need to understand what **ABC's** clients need and want. We need to ask the right questions in the most polite way possible and record it in the CRM system.

By offering new products and services that **ABC** clients need and want, we increase dramatically the probability of gaining clients for life. Clients for life implies that **ABC** becomes a major player in the finance world



Best Practices

8. Leverage expertise within and outside the enterprise. In other words:

- Share knowledge, share experiences, share “tricks”
- Learn from best-in-class companies
- Emulate best practices

8. **ABC** encourages a “Learning Organization” environment, which implies:

- Right culture
- Right leadership style
- Right attitude (for teamwork, listening, learning, and continuous improvement)
- Great communication skills
- Ongoing dialogue --- everything is a conversation



Important Note

- **ABC** has already developed a “corporate culture” which will be communicated through formal classroom sessions, intranet, handout materials, and “leading by example” (walking the talk)

The corporate culture will be institutionalized in the next few months by integrating it in the performance evaluation forms and in the policies, procedures, and processes of every organization



Best Practices

9. Automate, automate, 9. automate.

There are several ways to perform Client Service, including web-based Client Service. The intent is to keep the cost down

ABC will look at these options in the future when it is in position to develop and implement a complete technical infrastructure that incorporates EDW, EIP, BIS, CRM, ERP, and other alphabet soup systems



Best Practices

10. Outsource all non-strategic functions, processes, and tasks.

For example, website hosting eliminates 50% of TCO (total cost of ownership)

10. **ABC** will also entertain this best practice with the intent to become the most “lean and agile enterprise” in the industry. Becoming lean and agile translates into longevity and prosperity



Clarification

- **ABC** promises to transfer employees to better assignments if their work is either automated or outsourced.

ABC does not want to turn its operation into a sweatshop. As a Learning Organization **ABC** is committed to treat employees as a corporate asset that adds value. Value creation only comes from people that work on important things. The mundane, routine, and trite tasks and work need to exit the enterprise.



Lessons Learned From Other Companies

(per Fast Company October, 2004)

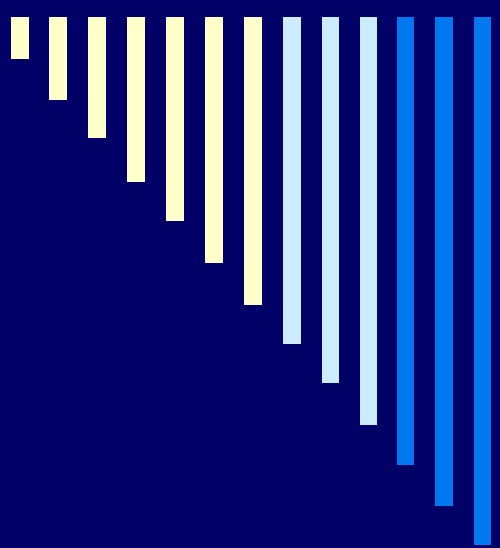
- ❑ Leaders in Customer 1st programs must be champions of the client experience
- ❑ Employee empathy creates distinctive service
- ❑ In the rules of engagement, technology rules
- ❑ Data helps, but using it to the benefit of the customer is crucial
- ❑ Cutting costs doesn't have to mean cutting service



Best Practices Conclusion

Best practices need to be viewed as ideas that can become strategic weapons for the enterprise. We need to leverage as many strategic weapons as we can if we are to become a formidable force in our industry.

ABC does not want to be an “also-ran” company — — but rather an industry leader



Client Service and Total Customer Experience (TCE)





Client Service Is:

- Giving the client what they want, when they want it, and how they want it
- Good communication and human relations skills = good client relations

What Is Wrong With This Picture?



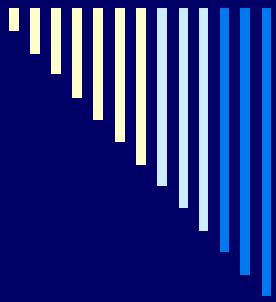


When In Doubt Apply The Golden Rule



Treat others as you want to be treated

... However, great CSRs know that it is even more important to treat clients the way they want to be treated



Must Ensure That Client Service Is:

- ☐ Scalable
- ☐ Efficient
- ☐ Flexible/Adaptive
- ☐ Value-added
- ☐ Supportive and complementary of the sales cycle



Key Realizations

1. Client Service offers a competitive advantage. Having the right mentality in dealing with Client Service is important because everyone responds according to the perspective that is laid out in front of them

Key Realizations

2. Every one that has the opportunity to come into contact with the client, automatically becomes a CSR --- Client Service Rep





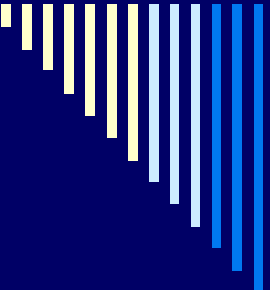
Key Questions

- Where do we “meet” the client first?
- What is the impression we want to leave the client with?
- Are we achieving this impression? Are we happy with what the prospects/clients see and feel?

Key Realizations

3. Client Service aims at creating a total customer experience (keeping the client happy (= enthused/delighted) and close during the complete lifecycle of dealing with the client – a.k.a. total care “from womb to tomb”)





From a customer's perspective TCE is all these:

- ❑ A great sales experience --- believing our value proposition, relieving the “pain”, improving cash flow
- ❑ A grand after-sales or client service experience
- ❑ Ability to communicate with us as needed in the “any-five” mode (with any one (ABC person or organization), any time, any place, in any language or culture, and in any way or means). This includes receiving updates and notification-only messages, responding to surveys, and offering feedback (including complaints)



TCE is also this:

- ☐ Cross-selling and up-selling
- ☐ Helping sales staff close deals faster
- ☐ Discovering new customers
- ☐ Discovering new latent customer needs that need to be fulfilled
- ☐ Simplifying sales, marketing, and support processes
- ☐ Making Contact and Call Centers more efficient



TCE is also about HELP:

- ☐ Help the client overcome mental barriers, including shame, guilt, fear, victim cycle, etc.
- ☐ Help the client see the problem, understand the problem in depth and its ramifications, understand the options available to her/him
- ☐ Help the client own the problem and its solution
- ☐ Help the client find the right solution
- ☐ Help the client execute the agreed solution
- ☐ Help the client with ideas and advice



HELP Cannot Happen If:

- ☐ You don't put yourself in the client's shoes
- ☐ You go through the processes in a mechanical and casual way
- ☐ You do not show enthusiasm and passion
- ☐ You are not a good listener and a caring person
- ☐ You are not willing to do some "baby-sitting" and "holding the client's hand"
- ☐ You are not client-centered
- ☐ You only think about your commission



... But More Importantly, TCE is
About ...

communications

With Clients



Client Communications

- ☐ Keep it simple
- ☐ Avoid jargon
- ☐ Listen for expression
- ☐ Be positive
- ☐ Never assume
- ☐ Never lead the discussion, unless you sense that the customer wants you to
- ☐ Verify their meaning
- ☐ Notice what is not said
- ☐ Stay on track
- ☐ Use the customer's words
- ☐ Speak slowly
- ☐ Remove anxiety
- ☐ Make it a pleasant experience



Suggestions To Stand Out To Clients

- ☐ Understand the client completely
- ☐ Help angry clients immediately
- ☐ Ask clients for more information
- ☐ Listen attentively
- ☐ Keep your word
- ☐ Resolve issues once the right way
- ☐ Strive to keep clients for life
- ☐ See clients as friends rather than foes --- despite the fact that some of them behave as such



Miscommunication

Miscommunication occurs when the message sent is not the message received.

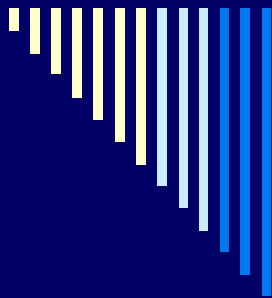
Many factors play a role, including:

- The people involved --- different cultures, values, vocabulary/definitions, and perceptions
- Biological needs interference
- Psychological and mental barriers
- The environment --- noise, distractions, stress, temperature, culture, prevailing attitude



How To Reduce Miscommunication

- ❑ Recognize your tendencies
- ❑ Reduce your distractions
- ❑ Recognize that communication is an effort
- ❑ Use your discipline to maintain focus
- ❑ Listen intently and carefully
- ❑ Increase your sensitivity --- put yourself in the customer's shoes



What Causes Miscommunication In Your Organization Today?

Internally

- ◆
- ◆
- ◆
- ◆
- ◆
- ◆
- ◆
- ◆

Externally

- ◆
- ◆
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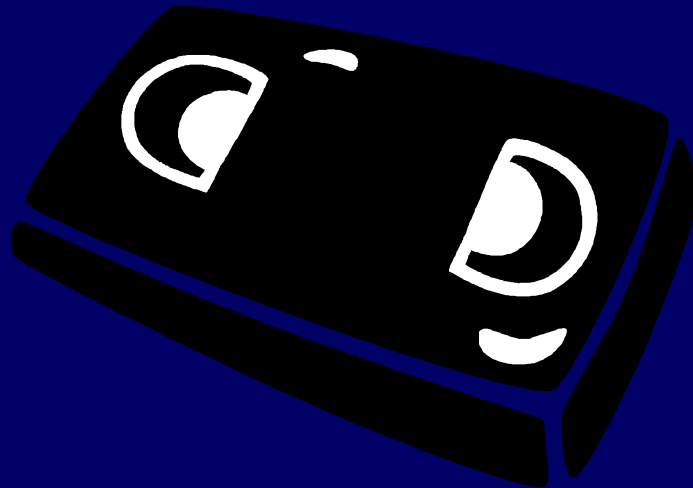


What May Prevent One From Being Sensitive

- ☐ Work deadlines
- ☐ Multiple tasks
- ☐ Job stress
- ☐ Personal stress
- ☐ Letting emotion block the message
- ☐ Poor listening skills
- ☐ Not asking probing questions
- ☐ Distractions
- ☐ Interruptions
- ☐ Hot buttons
- ☐ Cultural differences, personal biases
- ☐ One's history and emotional baggage -- already desensitized
- ☐ Tuned out

Video Time

- “We Are Here To Help” (5 minutes)



- Discussion/Debrief



Remember

- Every client's situation is unique, to some extent. We need to be sensitive to the client's needs and issues. When a problem arises, we should:
 - Be careful with humor --- phones and e-mail cannot properly portray your emotions (it is easy to be misunderstood)
 - Avoid generalizations and clichés. Avoid stereotypes
 - Check your style and tone of communicating. “One size fits all” is only good for socks, not people



What Makes Client Service Good?

- ❑ It is not the theory and the concepts
- ❑ It is not the theoretical value to the clients
- ❑ It is not the leader demanding it from her/his employees; it is the employee wanting to make it good ... wanting to make a difference
- ❑ It is the application of the theory and its execution

Bottom Line

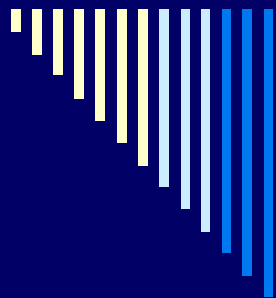
Remove headaches!

Make life less stressful!

Be the solution for the client!

Become the client's confidant and
trusted advisor





Questions?



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