

## Managing Expectations

Helping customers set appropriate expectations can help them avoid unexpected surprises. Use the worksheet below to identify techniques you already use to manage customer expectations as well as some new ones you might like to try. You can also write in a few techniques that aren't on this list.

**Onboard new customers.** Welcome new customers and explain any unique or unusual aspects of your service so they won't be surprised.

**Explain processes and procedures.** Explain service processes to customers so they know what to expect. This includes providing an overview of what will happen and approximately how long it will take.

**Give worst-case scenarios.** Avoid giving a range of best- and worst-case scenarios to customers, such as saying their order will arrive in 2 to 4 business days. The customer may only hear the best-case (2 business days) and could be disappointed if it actually took 3 days. Instead, give the worst-case scenario by saying it can take up to 4 business days. That way, the customer's expectations will be met if it comes in 4 days and they'll be exceeded if it comes in 2 or 3 days.

**Provide specific time estimates.** Customers may interpret ambiguous terms like "right away" or "very soon" differently than you intended. Try to provide a specific time frame, such as "in one hour" or "tomorrow by 8 a.m."

**Tell the truth.** Be honest when giving customers bad news. They may be upset, but they'll be upset and feel misled if they find out the bad news later.

## What other techniques have you used?

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2.

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3.

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