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# Top-Notch Concierge: Problem Solving Playbook

This micro-learning course is designed for all Customer Care Associates and will take approximately 10 minutes to complete. Throughout, we'll explore a simple six-step guide to problem solving in preparation for any challenge that comes our way!

By the end of this course, we should be able to:

- Apply a problem-solving framework when handling a challenge
- Effectively assist our customers with complex issues while delivering a concierge experience
- Improve our collaboration by exchanging ideas and solutions

Let's dive in!



**Problem Solving Playbook**

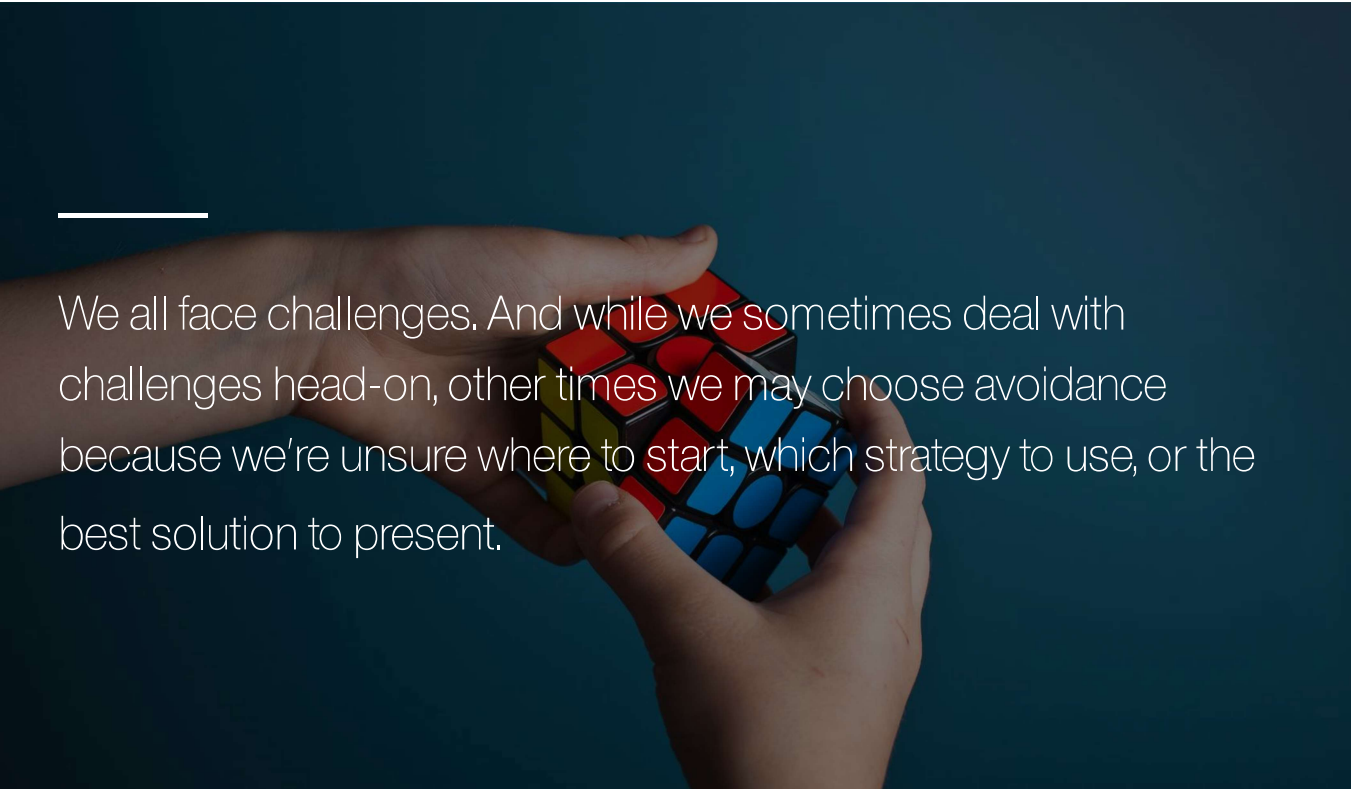


**Crack the Code**



**Evaluation and Resources**

# Problem Solving Playbook

A photograph of a person's hands holding a Rubik's cube against a dark blue background. The cube is partially solved, with red, blue, and yellow faces visible. The text is overlaid on the image.

We all face challenges. And while we sometimes deal with challenges head-on, other times we may choose avoidance because we're unsure where to start, which strategy to use, or the best solution to present.

Thankfully, problem-solving is a strategic process. We **identify** an issue and then **determine** the best action to help us move forward.

While there isn't one perfect solution for everyone, using a problem-solving framework can help boost our results.

## Step 1

# Reduce Customer Effort

The very first thing we should do when handling a challenge is **reduce the customers effort** meaning, make it as easy as possible for them!

Here are tips to make things seem simple:

- Use [REDACTED] to search for recent orders.
- Ask for their [REDACTED] to locate their order - don't waste precious time waiting for them to find it themselves!
- Scroll up and read the entire conversation in [REDACTED] so we don't need to ask them to repeat themselves.
- Call the customer! If we are actively assisting them and they have not responded or the call was disconnected reach out to them. This way, the customer doesn't need to wait to reach another associate.
- Use [REDACTED] to help with questions you may not know the answer to. This can improve our response time and accuracy of the information we are providing.
- Create [REDACTED] in [REDACTED] to help us stay accountable. [REDACTED] will ensure we follow up with the customer when we said we will or just to keep track of the order.

## Step 2

### Identify the Root Cause

We need to figure out the **root cause** of the problem, which is the reason **why the problem is occurring**.

It's important to use our time and energy targeting the root cause rather than a symptom, which is the result of the problem.

For example, let's say our customer has received her dinnerware shattered. The symptom would be shattered dinnerware and the root cause could be there wasn't enough packaging in the box to protect the dinnerware.

To target the actual problem, ask yourself, *"What's causing this problem?"* Scroll up through the conversation to get as many details as we can about the customer's situation.

*Reflect on the challenge you jotted down earlier...*

### Step 3

## Brainstorm Solutions

Once we know our root cause, think of the steps we might take to solve the problem. Consider what resources we have and the specific needs of the current situation at hand. It's helpful to have multiple solutions in mind.

To **think of more than one solution**, reflect on similar scenarios you may have encountered in the past, what would your peers do, or what would leadership recommend?

Generate as many ideas as possible, we will evaluate them in the next step!

*Reflect on the challenge you jotted down earlier...*

## Step 4

### Evaluate Possible Solutions

Now that you have possible solutions in mind, let's start to **evaluate** them, ask yourself:

- What resources or forms are needed to implement this solution?
- Has this solution been offered before and how did it turn out?
- What benefits does this solution offer for the customer? What about the company?
- What would be a successful outcome?

As we assess our information, create a pros-and-cons list to compare the solutions. This helps us determine which solution is the best.

*Reflect on the challenge you jotted down earlier...*

## Step 5

### Implement the Best Solution

The next step is to **implement your solution**. Let the customer know what your solution is and the actions you plan to take to make it happen!

If the customer is not pleased with the solution we offer, we can always try one of the other solutions we brainstormed earlier or ask the customer what their thoughts are. This can help us move forward in the process.

*Reflect on the challenge you jotted down earlier...*

## Step 6

### Evaluate Your Results

The last step is to **evaluate the outcome** of our solution to determine if it was successful.

We should collect feedback by using Stella scores or in certain situations calling the customer after a successful delivery to make sure we exceeded their expectations.

We can create a task in Gladly for ourselves to check back on the order and ensure the problem has been resolved.

*Reflect on the challenge you jotted down earlier...*



## Summary

Here is a quick recap of the steps!

1. Reduce Customer Effort
2. Identify the Root Cause
3. Brainstorm Solutions
4. Evaluate Possible Solutions
5. Implement the Best Solution
6. Evaluate Your Results

## Boost Your Skills

Now, let's say you've got the six-step process down. You follow it perfectly every time. But you're still struggling to problem-solve effectively.

Expand the rows below to explore three strategies for boosting your problem-solving skills:

### Be Solution Focused

Be solution-focused by turning your thinking from the problem to the solution. Here's how to check if you're solution focused:

- You focus on what can be done, not what can't be done.
- You maximize strengths, not weaknesses.
- You focus on the positive, not the negative.

### **Adopt a Positive Mindset**

Your thoughts are key to the energy and motivation you have to tackle your problems.

Instead of viewing a problem as a burden, think of it as an opportunity to grow and learn something new! Be enthusiastic about the opportunity to learn and how your efforts can have a positive effect on the problem's outcome and the customers experience.

### **Take a Brain Break**

When you spend a long time problem-solving, you can lose focus. Even when you aren't actively puzzling over a problem, your brain is still processing it in the background.

Taking a mental rest and doing something different allows your brain to get a quick refresh.

So, the next time you feel like you're mind blocked, take a short break to reboot your brain. Go for a quick walk outside, get a refill on your coffee, or get a nice change of scenery.

**CONTINUE**

# Crack the Code



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Remember, problem-solving is all about finding effective solutions to the challenges we encounter.

You have been equipped with a strategy to do *just* that! So let's get some practice.

Below are questions and/or activities to help us apply what we have learned throughout this course.

Fill in the blanks. The \_\_\_\_ \_\_\_\_ is the reason why the problem is occurring.

Type your answer here

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**SUBMIT**

Match the step to the description:

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# Evaluation and Resources



## Helpful Resources

Problem solving is an important soft skill that can effect various aspects of our lives. It allows us to navigate complex situations, deliver exceptional service, and drive positive results with our customers.

If you would like to learn more about problem solving during your spare time, check out these reads!

### What is Problem Solving?

This article will provide tools and resources like the '5 Whys' to enhance problem-solving skills and help uncover the root cause of a problem.

[VIEW ARTICLE](#)

### What's the Problem? A Different Approach to Problem Solving

This article by Forbes will explore a different method to problem solving. Although this method is slightly different, it carries many of the same principles.

[VIEW ARTICLE](#)



## **Your Feedback**

We would like to hear your thoughts! Please take a moment to share your feedback using the Evaluation Feedback Form below - we anticipate that this will take approximately 3 minutes to complete.

We greatly appreciate any feedback you provide as we use it to help improve not only this learning experience but all other learning and development opportunities for our associates.

Thank you in advance!