

7 Steps to Excellent Customer Service:

**Using Customer Touch Points
for Success**

By: Dr. Ronald L. Hollis

Overview

The following document describes the *7 Steps to Excellent Customer Service* that can be integrated into any business that serves customers and ensure excellent customer service throughout the organization. Excellent customer service is the result of defining expectations on how to interact with customers; consistent training; and leadership. With execution, these steps ensure consistent and excellent customer service between a team member (Team Member) and a customer (Customer). The items provided here are the primary guidelines to ensure that all the key aspects of the process are covered and clearly defined.

The following are defined terms used through-out the document to ensure clear and consistent communication of the various interactions that may occur between a Team Member and a Customer.

Defined Terms

- **Touch Point** - an single interaction point between a Team Member and a Customer
 - *example* – Answering the phone
- **Job Procedure** – a single process that a Team Member completes as part of their position
 - *example* – Document customer notes
- **Contact Scenario** – a collection of Touch Point(s) and Job Procedure(s) that define the complete start to finish of a scenario
 - *example* – Customer calls requesting a quote

The overall outline for the steps for the company and the functionals are based on:

1. **Steps to Excellence**
2. **Required Script Content by Type**
3. **Script Samples**
4. **Training**
5. **Expectations**
6. **Procedures**
7. **Potential Pending Touch Points**

Step 1 – Steps to Excellence

A summary of steps that outline the Touch Point and Job Procedure a Team Member will execute to complete a contact scenario.

Requirements

- Limited to 1 – 15 steps
- Directed by an action verb
- Must contain all Touch Point(s) and Job Procedure(s) to execute entire Contact Scenario

Sample

1. Receive notification¹
2. Review customer request
3. Identify customer expectations
4. Prepare paperwork and process
5. Send to operations for confirmation
6. Call customer for thank you

Special notes

1 - Do not specify notification type. Distinct contact methods should be detailed in script content

Step 2 – Require Script Content by Type

The following section details the various type of contact methods that be encountered by the Team Member from the Customer. The section also details the specific contact that must be communicated through each of the various contact methods.

Defined Terms

- **Contact Type** – method of interaction between Team Member and Customer
 - *example* – Phone call
- **Contact Reason** – purpose of interaction between Team Member and Customer
 - *example* – Thank you for order
- **Contact Script Content** – information that MUST be communicated/addressed to the customer during dialogue
 - *example* – Contact information

Sample

Contact Type - Phone call

Contact Reason –

- Customer Service Representative calling customer to confirm appointment

Contact Script Content

- Thank for order
- Review appointment and instructions
- Provide Customer Service Representative contact info

Step 3 – Script Samples

Script samples contain various example dialogues between a Team Member and a Customer. The samples provide methods to successfully handle a Customer's needs, objections, or concerns.

Sample (Customer Service Representative calling Customer to confirm appointment)

PM: May I speak with John

Customer: This is John

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PM: John, I am Bill Jones, your Customer Service Representative with ABC Company. We have your appointment scheduled for tomorrow at 9:00am. Thank you for the opportunity to serve you.

JOHN: OK

PM: I have reviewed your appointment and everything looks great!

JOHN: Sure

PM: Are you still able to make the appointment?

JOHN: Yes

PM: Great! We will look for you in the morning.

JOHN: Sure.

PM: Great. My name is Bill Jones. My direct number is 333-444-5555. Please call me if you have any questions.

JOHN: Ok.

PM: John, thank you again for letting us serve you.

John: Ok

PM: Great. Have a great day!

John: Ok

PM: Good-bye

John: Bye

Step 4 – Training

Training contains the Methods, Tools, and Testing required ensuring proper and comprehensive execution of the Contact Scenario.

Defined Terms

- **Method** – type of training format
 - *example* – Role playing
- **Tools** – documents/software that will help in the facilitation of training
 - *example* – TBD
- **Testing** – validation that the training was comprehensive and learned
 - *example* – Pop Quiz

Step 5 – Expectations

Expectations are the subjective desires of the contact scenario. The following is a listing of expectations that are acceptable:

1. Demonstrate appreciation to the customer by thanking them
2. Process the touch point professionally

3. Identify all potential issues
4. Be attentive and focus on making it easy for the customer to be served
5. Quickly engage the customer on all touch points
6. Over-communication on every touch point
7. Achieve a thorough understanding of all issues and their causes
8. Demonstrate expertise of the position
9. Instill confidence in our capability to meet the customer's needs
10. Be informative and detailed
11. Demonstrate our ability to address the needs of customer
12. Accurately record and represent all information
13. Build rapport with the customer
14. Provide alternate options / resolutions
15. Be courteous and friendly
16. Advise director or team leader

Step 6 – Procedures

Procedures are the detailed step by step descriptions and instructions to complete each and every Touch Point(s) and Job Procedure(s) necessary to complete the Contact Scenario.

Defined Terms

- **Job Procedure** – Use of internal systems and tools needed to complete Contact Scenario
 - *example* – Creating paperwork for a project
- **Touch Point Procedure** – Direct Customer interactions which requires the use of script contact and script samples
 - *example* – Call a customer to thank them

Step 7 – Potential Pending Touch Points

Additional Touch Points may be required as new customer interactions are discovered or developed with the growth of the business. It is imperative to have a system that allows Team Members to communicate their perspective for new Touch Points and a timely response to the development of these Touch Points.