Masterclass: Customer is king AND queen

*Evidence-based insights for social entrepreneurs*

Louise Wheeler
Director, Research Oxford Ltd

23rd March 2016
SESSION OBJECTIVES

1. Establish a useful definition for ‘great customer service’ (GCS)
   - Pinpoint key factors in the delivery of GCS
2. Explore obstacles to delivering GCS and how to overcome them
3. Understand why delivery of GCS is pivotal to the success of any venture
4. Identify what you need to do next
WHO ARE YOUR CUSTOMERS?

- Those who purchase your goods & services
- Those who you’re aiming to help - beneficiaries
- Funders

*Includes internal and external customers*
EXERCISE:
WHAT ARE THE CHARACTERISTICS OF GREAT CUSTOMER SERVICE?
DEFINING GREAT CUSTOMER SERVICE

• Positive & helpful attitude
• Professional
• Proactive & responsive
• Solution-focused
• Accountable
• Respectful
# GREAT CUSTOMER SERVICE: THE PROCESS

<table>
<thead>
<tr>
<th></th>
<th>GREAT CUSTOMER SERVICE: SIX KEY STEPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Warm welcome</td>
</tr>
<tr>
<td>2</td>
<td>Identify needs</td>
</tr>
<tr>
<td>3</td>
<td>Explore option(s)</td>
</tr>
<tr>
<td>4</td>
<td>Manage expectations</td>
</tr>
<tr>
<td>5</td>
<td>Agree next steps</td>
</tr>
<tr>
<td>6</td>
<td>Positive close</td>
</tr>
</tbody>
</table>
## GREAT CUSTOMER SERVICE: KEY FACTORS

<table>
<thead>
<tr>
<th>STEP</th>
<th>KEY FACTORS: ATTITUDE &amp; BEHAVIOURS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Warm welcome</td>
<td>Positive, friendly, trustworthy, professional, attentive</td>
</tr>
<tr>
<td>2. Identify needs</td>
<td>Open questions, listening, non-judgment, patience, empathy, treat as individual, focus on positive</td>
</tr>
<tr>
<td>3. Explore option(s)</td>
<td>Flexible, innovative, two-way process</td>
</tr>
<tr>
<td>4. Manage expectations</td>
<td>Honest, clear, positive assertiveness, check satisfaction</td>
</tr>
<tr>
<td>5. Agree next steps</td>
<td>Summarise &amp; clarify, take ownership</td>
</tr>
<tr>
<td>6. Positive close</td>
<td>Positive, friendly, trustworthy, professional, attentive</td>
</tr>
</tbody>
</table>

*walk in the customer’s shoes*
EXERCISE:
WHAT CAN DERAIL / OBSTRUCT DELIVERY OF GREAT CUSTOMER SERVICE?
OBSTACLES AND CHALLENGES

• Maintaining positive verbal AND non-verbal behaviour
• Achieving consistency
• Preserving GCS during times of stress
• Ensuring availability/responsiveness
• Developing a GSC organisational culture
• Monitoring customer service – is it working?
HOW CAN THE OBSTACLES BE OVERCOME?
# OVERCOMING OBSTACLES

<table>
<thead>
<tr>
<th>CHALLENGE/OBSTACLE</th>
<th>SOLUTION/MANAGING RISK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintaining positive verbal AND non-verbal behaviour</td>
<td>Team development: Training, mentoring, coaching; reflective practice</td>
</tr>
<tr>
<td>Achieving consistency</td>
<td>Develop, communicate and develop a customer service strategy with minimum standards. Regularly review. Proactive recruitment</td>
</tr>
<tr>
<td>Preserving GCS during times of stress</td>
<td>Identify &amp; preempt ‘red flags’ / pinch points; manage &amp; secure adequate human resources</td>
</tr>
<tr>
<td>Ensuring availability/responsiveness</td>
<td>As above. Check user-friendliness of contact channels</td>
</tr>
<tr>
<td>Developing a GSC organisational culture</td>
<td>Proactive recruitment based on CS values &amp; ethics as well as ability &amp; ‘hard’ skill</td>
</tr>
<tr>
<td>Monitoring customer service – is it working?</td>
<td>Implement process evaluation including customer feedback. Start simple but do something!</td>
</tr>
</tbody>
</table>
WHY IS GREAT CUSTOMER SERVICE IS SO IMPORTANT?


- 5-20%: probability of selling to a new prospect
- 60-70%: Probability of selling to an existing customer

**Marketing Metrics**

- News of bad customer service reaches more than twice as many ears as praise for a good service experience
  
  *White House Office of Consumer Affairs*

- A typical business hears from 4% of its dissatisfied customers
  
  *“Understanding Customers” by Ruby Newell-Legner*

- In the last year, 67% of customers have hung up the phone out of frustration they could not talk to a real person
  
  *Consumer Reports Survey, 2011*

- 70% of buying experiences are based on how the customer feels they are being treated
  
  *McKinsey*
FURTHER INFORMATION

Please contact:

Louise Wheeler, Director
louise.wheeler@researchoxford.co.uk
+44 (0)77869 25969
+44 (0)1865 596771
https://twitter.com/researchoxford1
http://uk.linkedin.com/in/louisewheeler

http://www.researchoxford.co.uk/