

CHAMPION CUSTOMER CARE WORKBOOK

A BASIC BUSINESS VICTORY GUIDE

This book was developed by James H. Saylor

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FOREWARD

This basic business workbook is part of the VICTORY Basic Business series. For over 30 years, the pursuit of a simple, easy-to-use, proven, inexpensive management system for any organization has been my focus. *MANAGING FOR VICTORY™* is this system. The *MANAGING FOR VICTORY™* system includes:

Visioning creates a common focus

Involving everyone establishes a superior organization

Continuously improving achieves excellence

Training, educating, coaching, facilitating, and mentoring develops a learning culture

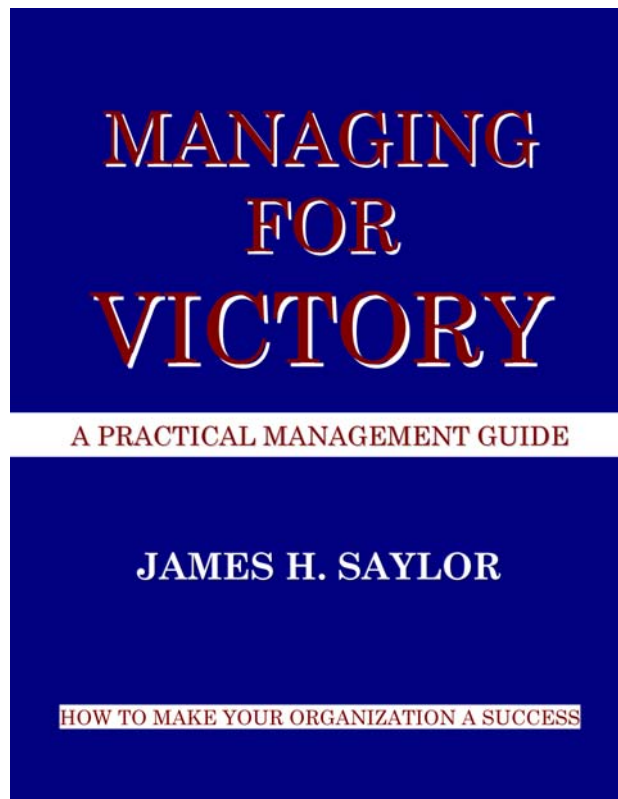
Owning the work fosters empowerment

Recognizing and rewarding builds high performance

Yearning ensures success

Customers drive VICTORY

Progressive Leaders guide VICTORY



ABOUT THE AUTHOR

James H. Saylor is the founder of The Business Coach, an organization focusing on helping other organizations achieve their specific VICTORY. He has assisted many organizations in discovering, designing, developing and doing successful management systems. In addition, he has led, managed, coached, trained and facilitated many individuals and organizations in achieving their specific VICTORY. Jim has over 30 years experience in operations, organizational development, sales, marketing, training, project management, quality and logistics. He has prepared and presented many highly proclaimed training seminars and workshops globally. Jim is a widely recognized leading champion of Total Quality Management in the 1980s and 1990s. Jim is the author of *TQM Simplified*, and co-author of *Customer-Driven Project Management* published by McGraw-Hill. Jim's latest book is *MANAGING FOR VICTORY™*. For further information about Jim's books, guides and workshops see websites: www.managingforvictory.com or www.thebusinesscoach.org or email coachjim@thebusinesscoach.org.

CHAMPION CUSTOMER CARE

A champion customer care organization can make a difference. First, a champion customer care organization creates a continuously improving customer focused culture. Everyone in the organization champions customer care. Second, the customer care organization has a benefit to the organization. It is the image of the organization. Third, the customer care organization allows empowerment. This empowerment is defined by boundaries of authority, responsibility and resources. Fourth, the customer care organization makes a difference in profitability by getting and keeping customers. In addition, they offer cost effective solutions to customers. Fifth, the customer care organization provides a focus of the organization to gage success. This incites the passion to care for customers. Sixth, the customer care organization optimizes productivity by continuously improving processes and using the using latest technology. Finally, the customer care organization nurturers total customer satisfaction. This is the essence of champion customer care. A champion customer care organization:

Creates a continuously improving customer focused culture

Has a benefit to the organization

Allows empowerment

Makes a difference in profitability

Provides a focus for the organization

Incites passion

Optimizes resources

Nurtures total customer satisfaction

CREATE A CUSTOMER FOCUSED CULTURE

Everyone in the organization must have a customer focus. The organization must focus on customer satisfaction of both internal and external customers. Figure 1 shows the relationships of internal and external customers. Each process is the customer of the next process. These are the internal customers. If each internal customer satisfies the next internal customer while focusing on external customer satisfaction, the ultimate customer -- the external customer -- will be satisfied.

The organization needs to adopt a customer-focused organizational culture. This is a culture where everyone in the organization is driven by customer value. In order to build a customer-focused organizational culture, customers need to be included in internal process planning. In addition, the organization should create opportunities for customer interaction.

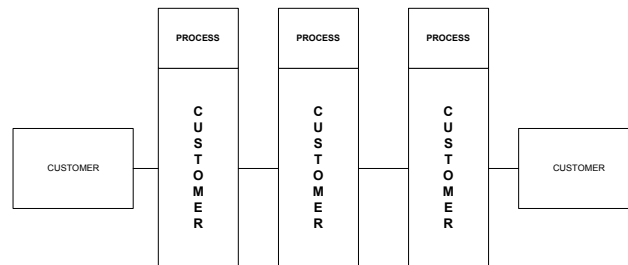


Figure 1 Customer relationships.

Orient Everyone in the Organization with Customer Focus Considerations

Adopt a customer-focused organizational culture

Include customers in internal process planning

Maximize customer interaction

HAS A BENEFIT TO THE ORGANIZATION

Champion customer care has many benefits to the organization. The customer allows the organization to exist. This is true of every organization (profit or non-profit), company, partnership, sole proprietorship, department, function, group or team. Without customers and the organization's ability to fulfill customer's needs, there will be no organization. Customers influence profit. They pay the wages of the organization's employees. The customer brings into being the organizational structure. It is the customer that dictates product quality and service quality. The customer determines inventory. It is the customer that determines on-time delivery. The customer defines performance of the organization. The customer pulls all the organization's processes. The customer defines organizational excellence. Therefore, the customer drives everything for the organization.

In summary, customers can make or break the organization. The customer is the reason for the existence of any organization. They expect satisfaction. Customers allow payments. They set quality standards. Customers receive the output of the organization's processes. Therefore, customers drive the organization.

Can Make or Break Organization Considerations

R Reason for existence

Expects satisfaction of needs

Allows payments, including wages

Sets product quality and service quality

Obtains output of processes

Needs to be focus of the organization

ALLOW EMPOWERMENT

Empowerment is an essential element of champion customer care. Empowerment means a person can do whatever is necessary within their area of responsibility, authority, and resources to perform, improve or satisfy the customer. You own what you have the power to do. This builds on an optimistic and positive approach of guiding people. People want to contribute and work hard, and management's job is to provide the environment where they can do so. The challenge is to find the balance between empowerment and control. Empowerment is the process of enabling employees at all levels to exercise wide discretion in meeting customer needs, both within and outside the organization. Control is the process of setting boundaries on that discretion, through guidelines, so that employees are clear on the extent of empowerment.

The organization's role in empowerment should be a supportive and enabling one. The organization develops their people's capacity to perform and assume more responsibility to serve the customer, whether inside or outside the organization. Organizations remove the barriers to empowerment and draw the boundaries of discretion for each employee. The empowerment process involves the gradual shifting of responsibility, authority, and resources to people in the organization performing and improving the work. As the organization empowers the people, the whole organization improves.

The organization wants empowered people because they:

Energize themselves and others

Make things better and better

Promote teamwork

Own their work

Work on vital issues

Encourage open and honest communication

Recognize achievements

Enjoy their work

Devote themselves to continuous improvement

MAKES A DIFFERENCE IN PROFITABILITY

Profit is the result of customer care. Therefore, the organization's customer care is a profit center. Customers affect profit in two ways. Customers quit which leads to a loss of profit and customers join which leads to a gain in profit. Most customers quit because of an attitude of indifference toward the customer. The cost of losing a customer can be enormous. In addition, the cost of getting customers is many times more than the cost of keeping customers. The main goal of any business is getting and keeping customers. This is the essence of any organization. Organizations must continuously get and keep customers to survive and thrive.

Customer care profit considerations include:

Provide champion customer care

Recognize everyone as a customer care champion

Orient everyone with a customer care attitude

Focus on keeping and getting customers

Identify customers' contributions to profit

Treat customers as special

PROVIDES A FOCUS FOR THE ORGANIZATION

Customers provide the focus for the organization. Customers power purpose, people, process, performance, pride, praise and passion in the organization. The organization's success or failure depends on customers. Customers can make or break an organization. Different customers have unique needs and expectations. Therefore, each customer sets its own requirements for satisfaction. Customers are always customers and they deserve to be treated special. By orienting everyone in the organization with the importance of customers, they can all work toward getting and keeping customers. The key is to listen to the customer to ensure the organization's offering meets the customer's requirements. Finally, the organization should always be aware of customer relationships.

Customer considerations include:

Can make or break an organization

Unique needs and expectations

Set total customer satisfaction targets

Treat customers as special

Orient everyone in the organization with a customer focus

Make getting and keeping customers the goal

Engage the "voice" of the customer in product/service design

Relate to customers as long-term partners

INCITES A PASSION

Passion is essential for champion customer care. Champion customer care requires people to be committed, enthusiastic, loving, sparkling, zealous, positive, and fervent to achieve success. Passion is a major factor in determining the climate in the organization. People in the organization must demonstrate appropriate passion. Passion gets more passion. Passion inspires others to work toward a common purpose. Passion involves people in the vision. Passion induces others to act with enthusiasm toward common principles. Passion stimulates love of customers. Passion strengthens the spirit to keep growing. Passion instills zeal for perfection. Passion with a positive attitude influences an obsession with the positive. Passion nurtures success.

People that love their customers take care of their customers. A passionate loving attitude has definitive impact on care for customers. It has been proven that a negative organization cannot have a positive outcome with customers. Attitude has the most impact on the customer experiencing total customer satisfaction. Customers may value your organization, but they will go elsewhere over a negative interaction. Therefore, a passionate loving attitude is very important to success for any organization.

Passion considerations

Pursue commitment

Act with enthusiasm

Stimulate love of customers

Spark the spirit for progress

Instill zeal for perfection

Obsess with a positive attitude

Nurture fervor for success

OPTIMIZES RESOURCES

Champion customer care optimizes resources. By focusing on the customer, the organization can organize resources with the aim on the customer. This provides the common goal that teaches ownership while increasing value. All of the above factors lead to managing costs. In today's world appropriate technology is a difference maker for success. The champion customer care organization seeks to use appropriate technology for effective and efficient internal operations while satisfying the customer. The technology must link customers, the organization and suppliers.

Champion customer care means optimal resources:

Organizes with focus on customer

Provides common goal

Teaches ownership

Increases value

Manages costs

Uses appropriate technology

Links customers, organization and suppliers

NURTURES TOTAL CUSTOMER SATISFACTION

The target for any organization is total customer satisfaction. Customers are the only ones who can determine total customer satisfaction. In order to know if the customer is satisfied, intense interaction and observation is necessary. Only through interaction, observation, communication, especially listening, and measurement can the organization determine total customer satisfaction. The organization must use every means available to set total customer satisfaction targets.

It is important to keep in mind that the target is total customer satisfaction. Customer satisfaction implies fulfilling the customer's needs and expectations, and not just providing the product or service. By going beyond just servicing customers, you will satisfy both yourself and your customers.

The total customer satisfaction considerations provide a starting point for defining total customer satisfaction metrics.

The following are total customer satisfaction considerations:

Service and product quality

Adaptability

Time, speed and responsiveness

Integration with customer's systems

Support

Flexibility

Availability

Consistency

Technology

Involvement of customer

Optimization of business processes

Needs and expectations

Are You a Champion Customer Care Organization?

	NO	Yes
Do you have a customer focused culture?		
Does everyone in the organization understand that the customer allows the organization to exist?		
Are people in the organization allowed to do whatever is necessary within reason to satisfy a customer?		
Do people in the organization know their specific impact on customer influence on profit in the organization?		
Does everyone in the organization focus on customer satisfaction?		
Is everyone in the organization passionate about satisfying customers?		
Is everyone in the organization aware of obligation to optimize resources while satisfying customers?		
Does the organization have total customer satisfaction targets/		
Does everyone in the organization care about customers?		
Is your organization a champion customer care organization?		

Based on the questions above, you can determine if you are a champion customer care organization.

Are you a customer care champion? Yes No

If yes, congratulations you should celebrate your organization's success?

If no, would you like to become a customer care champion?

Maybe your organization needs improvement to become a customer care champion?

CHAMPION CUSTOMER CARE PLAN

If you strive to be a champion customer care organization, you must start planning today. Planning makes the organization's focus a reality. Planning involves determining the gap between today and the future, and then deciding what needs to be done to get from where you are now to where you want to be in the future. Once the organization determines the gap, the organization takes action to achieve the future state.

Planning considerations include:

Provide understanding of where you are today

Learn where you want to go in the future

Analyze how to get from today to the future

Navigate to get to the future state

Provide Understanding of Where You Are Today

In order to understand where you are today, the organization performs various assessments. The assessment of the organization starts with the focus on total customer satisfaction. By knowing its customers, the organization focuses the development of relationships to keep and gain customers both internal and external. In addition, the organization must know itself, its product/service, and the competition. By knowing itself, the organization understands what it can do to satisfy its customers. By knowing the product/service, it allows the organization to position the deliverable to maximize total customer satisfaction. By knowing the competition, targets can be established for gaining advantages in the marketplace. Figure 2 shows the elements that must be assessed in order to achieve total customer satisfaction. All of the elements must be assessed with the environment in mind.

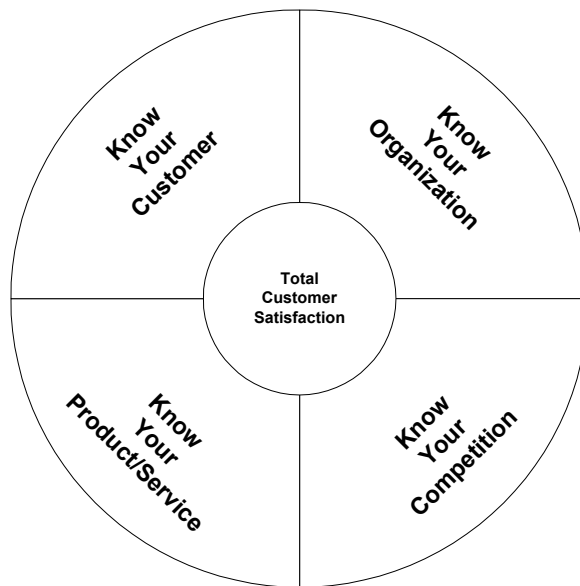


Figure 2

Know Your Customers

Find out what your customers value.

The champion customer care organization knows its customers best. With the customer as the driver of the organization to include products and services, the organization knows its customers intimately.

There are many ways to know your customer. You can do market research, focus groups, and many other methods. There is only one “best” way to know your customers. You must communicate and especially listen to them. You must make personal contact with as many customers as possible. It is particularly important to have dialogue with your major customer(s) or customer base. There are too many organizations that do aloof customer intelligence or they believe they know what is best for their customers. These organizations will never reach perpetual prosperity.

✎ **Action:** In the table below, list your customers in column 1 and then list in column 2 the value you provide to the customer.

CUSTOMER	THEY VALUE ME FOR:

Know Yourself

Find out what you are and what you can give.

The organization must know itself to achieve organizational excellence focused on total customer satisfaction. In the process of knowing yourself, the organization looks inward to its organizational culture and internal processes. In this process, the organization is examining its own way of doing business.

It must examine its culture to discover the true nature of the organization. The organizational culture includes: language, behavioral norms, ceremonies, informal and formal social and work process, organizational management style, reputation, image, philosophies, values, attitudes, beliefs, assumptions and traditions. The organizational culture has a major impact on performance of any success effort. The organizational culture affects the following:

Communications, internal and external

Unity for cooperation and teamwork


Leadership and followership styles

Time and urgency factors

Uniqueness in the marketplace

Relationships

Effectiveness, efficiency, productivity and quality

 **Action:** In the space below, describe your customer organizational culture.

Know Your Product/Service (Deliverables)

Deliver what the customer values plus.

The organization must know all there is to know about its product to achieve total customer satisfaction. This includes knowing all the aspects of the product. The product is an output of a process that is provided to a customer (internal/external) and includes goods, services, information, etc. The product is all aspects contributing to customer satisfaction. This can include such items as: product quality, reliability, maintainability, availability, customer service, support services, supply support, support equipment, training, delivery, billing, marketing, etc. Again, every one of these elements of the product and/or service must focus on customer satisfaction. The goods or services may be the best in the marketplace, but it is the entire product that contributes to total customer satisfaction. If the product does not provide total customer satisfaction, the customer will not be satisfied and most likely will go elsewhere to find a product that gives total customer satisfaction.

When striving for total customer satisfaction, the product and/or service, at a minimum, must be comparable to the product offered by the competition. Obviously, a competitive advantage is gained by improving the product. Raising the level of customer satisfaction may differentiate the product or service. A thorough analysis should always accompany any targeting of a product for customer satisfaction.

The goal is always to optimize customer satisfaction with resources. Raising the level too far beyond the current range of customer satisfaction is risky because of two factors. First, the cost factor could impact perceived value. Secondly, the customer may not be ready for the enhanced product or service. In both cases, the product or service may not be sold because it did not satisfy the customer.

✎ **Action:** In the table below, list the deliverables (product/services) you provide your customer(s) in column 1 and then list in column 2 state what makes the customer satisfied with the deliverable.

DELIVABLE (PRODUCT/SERVICE)	MY CUSTOMER IS SATISFIED WHEN

✎ **Action:** In the table below, list the characteristics for customer satisfaction from the table above. in column 1 and then list in column 2 how you measure this characteristic in your organization.

MY CUSTOMER IS SATISFIED WHEN	I CAN MEASURE THIS BY

✎ **Action:** In the table below, list the measures of customer satisfaction from the table above. in column 1 and then list in column 2 your current performance in your organization.

CUSTOMER SATISFACTION MEASURE	MY PERFORMANCE

✎ **Action:** In the table below, list the improvement areas from the table above. in column 1 and then list in column 2 the person(s) responsible for taking action.

IMPROVEMENT AREA	CHAMPION

Know the Competition

Beat the competition by taking time for intelligence gathering.

The organization must know the competition to establish targets for its products and services and internal improvement efforts. The organization must establish product and service targets in relation to its competition. Typically organizations compete in the major areas of technology, cost, product quality, service quality, and time. Frequently, product competition progresses from one area to the next area. It starts with technology, then cost, then product quality, then quality service and then time or some other area.

For instance, when the television was first marketed, technology was the foremost satisfier of the customer. Once the technology was readily available and television became more desirable to customers, price became the most important element. As the television became commonplace, customer satisfaction was judged through product quality; and quality service is the differentiator. Today, television competes on all levels at the same time.

The organization must know in which major area of competition its product and services are competing. This will show the organization where to target its product and services. In addition, the organization should always attempt to achieve the competitive advantage. Therefore, it is important to look for ways to differentiate within the major areas of competition.

The organization must know where it is in relation to the competition to establish internal improvement effort targets. To determine its position in the competitive market, the organization should benchmark itself against its top competitor and the best in the field. Once benchmarks are determined, the organization can establish internal targets for improvement efforts.

Competitive Analysis

✎ Action: Answer the following questions.

Does your organization's deliverables face more competition today than in the past?

Never	Seldom	Sometimes	Usually	Always
1	2	3	4	5

Does your organization face competition for resources?

Never	Seldom	Sometimes	Usually	Always
1	2	3	4	5

Does your organization need to rapidly respond to customers?

Never	Seldom	Sometimes	Usually	Always
1	2	3	4	5

Does your organization provide deliverables at higher perceived value than your competition?

Never	Seldom	Sometimes	Usually	Always
1	2	3	4	5

Does your organization provide the highest quality deliverables?

Never	Seldom	Sometimes	Usually	Always
1	2	3	4	5

Does your organization get its deliverables to the marketplace faster than the competition?

Never	Seldom	Sometimes	Usually	Always
1	2	3	4	5

Does your organization know more about the competition than the competition knows about you?

Never	Seldom	Sometimes	Usually	Always
1	2	3	4	5

Do your organization's systems provide more flexibility than your competition?

Never	Seldom	Sometimes	Usually	Always
1	2	3	4	5

Does your organization's processes adapt more readily to changing customers desires than your competition?

Never Seldom Sometimes Usually Always
 1 2 3 4 5

Does your organization improve its processes faster than your competition?

Never Seldom Sometimes Usually Always
 1 2 3 4 5

🗑️ **Action:** Add the total number of points for the questions above. If you total 50 points you already know your competition. If you score less than 50 points, you need to look more closely at your competition. NOTE: Your competition is always changing and your competition in the future may come from a place you do not expect. .

Score: _____

🗑️ **Action:** In the table below, list your competition in column 1 and then list in column 2 the value they provide to the customer.


COMPETITION	THEY ARE VALUED BY CUSTOMER FOR:


✎ **Action:** Based on your knowledge of your competition, list the threats in column 1 and opportunities in column 2. Be sure to look at the areas of technology, cost, product quality, service quality, and time when viewing threats and opportunities.

THREATS	OPPORTUNITIES

Learn Where You Want to Go in the Future


Learning where you want to go in the future involves the strategic focus. The strategic focus is the vision, mission and values of the organization.

 **Action:** In the space below, visualize your perfect organization.

 **Action:** From your view of the perfect state and your organization's strategic focus, in the space below provide your view of the future state for your perfect organization.

Analyze How to Get From Today to the Future

Once the organization has established a strategic focus, the organization must analyze how to bridge the gap from today to the desired future state. This involves combining all the information from the current state with the common view of the future into one focus.

 **Action:** Review all the information from the previous worksheets. List opportunities, issues and problems you need to attack to get to the future state.


Opportunities, Issues, Problems

Navigate to Get to the Future State

The final step is the most important. There are many organizations that plan, plan and plan. There are organizations that act, act and act. The winning organization plans and acts on the plan.

The action planning process integrates with the strategic planning process. The focus for action planning comes from the common focus of the organization. From these actions, the action process provides the execution of the plan.

The action items are the specific actions that need to be accomplished to achieve goals. These action items are actions that are to be accomplished within 90 days to achieve any improvement action. Action items are updated as necessary. They should be reviewed and updated by management at least every 30 days.

 **Action:** Determine the actions required to take advantage of the opportunities, issues and problems to achieve the future state in the organization.

ACTION ITEM RECORD

Item #	Action Item	Start Date	Date Completed	Owner

Use Continuous Improvement Cycle

The continuous improvement system cycle involves five stages: clarifying the focus, yearning to discover improvement opportunities, choosing improvement opportunity, launching improvements using an improvement methodology, and evaluating the results. A sixth stage can be added as a reminder -- do it again and again and again. This cycle is never-ending.

Stage 1: Clarify the focus

During this phase, the focus and priorities are determined.

Stage 2: Yearn to discover improvement opportunities

This phase involves listing all improvement opportunities.

Stage 3: Choose improvement opportunity

Specific improvement opportunities are selected in this phase.

Stage 4: Launch improvement using improvement methodology

This phase uses a disciplined methodology to improve the process. See the IMPROVE methodology.

Stage 5: Evaluate the results

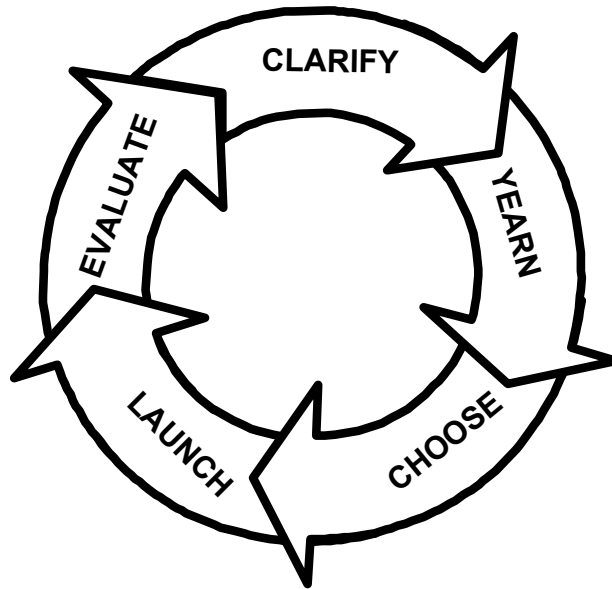
During this phase the improvements are evaluated against the impact on achieving the overall mission/vision of the organization.

Stage 6: Do it again and again and again

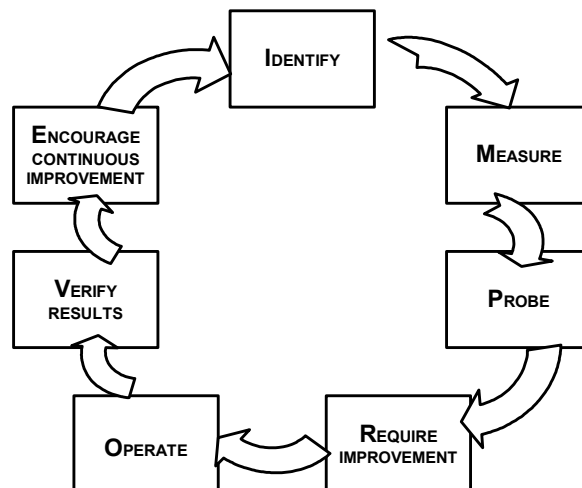
This is a never-ending process. Everyone must continuously repeat the improvement cycle.

Use Continuous Improvement Cycle/Methodology

Continuous Improvement Cycle (Strategic)



Continuous Improvement Methodology (Operation)



KEEPING AND GETTING CUSTOMERS

Business is getting and keeping customers.

The main goal of any business is getting and keeping customers. This is the essence of any organization. Organizations must get and keep customer to survive and thrive. The following sections provide processes for getting and keeping customers.

GETTING CUSTOMERS

Create value for your customer.

In order to get customers, you must first have a product or service worth paying for. The organization must provide some benefit to a customer and the benefit must have value to the customer. This requires understanding the customer's needs and expectations, determining how to meet those needs and expectations, and delivering total customer satisfaction. You get customers by:

Viewing deliverables from the customers' standpoint

Aiming for the right customers

Looking to establish organizational excellence

Understanding your customers

Ensuring it is easy for any customer to do business with you

Value – View Deliverable from the Customers’ Standpoint

Walk in your customers’ shoes


The first step to getting customers is having a deliverable that customers will buy. This starts with understanding the customer’s needs and expectations from the customer’s standpoint. The identification of customer values requires systematic, thorough and continuous research. The most important aspect of this process is to listen to the customer. Listening is continually emphasized in this workbook. Executives, managers and associates must continuously listen to their customers.

It is important to use as many tools and techniques as possible to understand your customers. It is essential that in understanding customers, the organization empathize with the customer. You need to walk in the customers’ shoes. See, feel and touch your deliverable as a customer. This includes the total customer experience from sales contact, ordering, delivery, billing, etc.

The organization must know all there is to know about its deliverables to achieve total customer satisfaction. This includes knowing all the aspects of the deliverable. The deliverable is an output of a process that is provided to a customer (internal/external) and includes product, services, information, etc. The deliverable is all aspects contributing to total customer satisfaction. This can include such items as: product quality, reliability, maintainability, availability, customer service, support services, supply support, support equipment, training, delivery, billing, marketing, value and so on. Again, every one of these elements of the deliverable must focus on customer satisfaction. The product or services may be the best in the marketplace, but it is the entire deliverable that contributes to total customer satisfaction. If the deliverable does not provide total customer satisfaction, the customer will not be satisfied and most likely will go elsewhere to find a deliverable that gives total customer satisfaction.

Total customer satisfaction includes all elements required to satisfy the target customer(s) both internal and external. This can be items such as:

- product quality
- service quality
- value
- performance
- availability
- durability
- aesthetics
- reliability
- maintainability
- consistency
- easy-to-do business with
- doing what is promised
- doing what is expected
- provide value
- low cost
- superior technology
- or any other characteristic that satisfies customers' needs and expectations.

 **Action:** From your customers' standpoint, what items from the above list does your customer value.


ITEM	VALUE	CUSTOMER

Value – Aim for the Right Customers

Shooting at the wrong target is a waste.

Your deliverables must be targeted for the right customers. Too many organizations try to be all things to all customers. This is a mistake. Some customers want your deliverable but they do not earn you a profit. Some customers really like your deliverable but they cannot buy your deliverable. Some customers favor your competition. Some customers do not need all your elements of total customer satisfaction. You need to identify the customers that can lead to your success.

Finding the right customer may be complex for some organizations. Organizations may have many customers, many types of customers and customers may change. Targeting the right customers is different for every organization. In many organizations, the customer-driver may be an ideal customer or customers as determined by the organization.


 **Action:** From your standpoint, who are the customers that provide you the most value (today or future). List your target customers in the table below.

CUSTOMER	VALUE TO YOU

Value – Look to Establish Organizational Excellence

You need to deliver customers' expectations at manageable cost.

Once you know the customer's expectations, you need to meet those expectations. When you consistently meet customer expectations, you have achieved organizational excellence. The customer defines organizational excellence. The customer tells you everyday whether you are excellent or not. Customers vote everyday by doing business with you or not doing business with you. In addition, you need to constantly measure yourself from the customers' view.

 **Action:** From your target customers' view, what are their expectations (today or future). List your target customers and their expectations in the table below.

CUSTOMER	EXPECTATIONS

Value – Understand Your Customer

The customer is always the customer.

You may have a deliverable worth paying for. You may have identified the right customers to buy your deliverable. You may have an excellent organization. However, you still need to understand your customer on a daily basis. This is particularly true when selling to the customer.

Customer needs are not static; they are always changing. Customers may have different needs at different times. Once customer needs are identified, these needs must be continuously monitored to ensure the product and/or service still satisfies them.

Needs are constantly replaced by other needs due to the changing world environment. Rapidly changing technology, differing tastes, differing economic conditions and rising expectations due to past successes are some of the many factors influencing customer changes.

In addition to the changeability of customers, there are different behavior styles of customers. These styles are typically classified into groups depending on personality patterns. Although a customer may have a predominate style, the style may change based on the situation. All of these issues complicate the process of understanding customers.

You should address the following four “T’s” when understanding the customer.

Importance

Inhibitions

Investment

Inurance

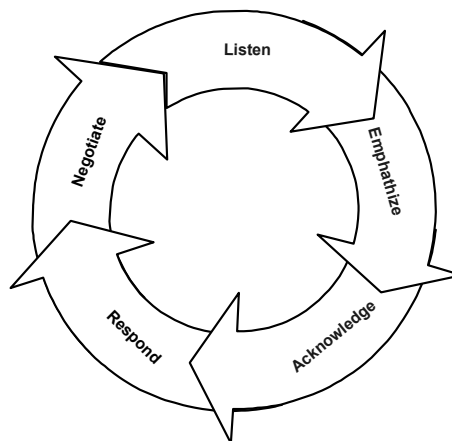
If you put each of the “T’s” on one finger on your hand and hold your hand so that the thumb points toward you. You will see the that you can and must influence each one of these “T’s.”

Value – Understand Your Customer Action Process

“I can help you.”

The following is a five step process for effective customer communication. The process starts with listening to the customer. You should always empathize with the customer’s point of view. This should be acknowledged to the customer by showing that you understand their concern, point of view or statement. This can be accomplished by simply agreeing with the customer or restating customer’s words in your own words. Once you listen to the customer, you can respond by asking questions to gain more understanding. You must respond and listen until you understand the customer. You may even have to return to showing empathy and acknowledging based on new points. Your response should be aimed at seeking a win-win agreement for both parties. Once you understand the customer, you begin negotiation. You negotiate with the customer until you both agree. The action process below provides guidelines to help learn from your customer during any interaction.

Listen
Empathize
Acknowledge
Respond
Negotiate



Value – Understand Your Customer Action Process

“We can win-win.”

During negotiation, attend to the customer. Look for verbal and non-verbal clues. Gather information by asking questions focused on win-win solutions. Review points of agreement. Establish a win-win resolution. Evaluate and formalize the solution


Attend

Gather

Review

Establish

Evaluate

 **Action:** In the space below, describe an interaction with a customer in which the above process could have made a difference.

Value – Ensure that it is Easy for the Customer to do Business with You

A smile is not enough.


It has been shown time and again that companies lose customers because they are difficult to do business with. Everyone has a customer experience with too much or complex paperwork, an indifferent or unknowledgeable service worker, getting the runaround when trying to return a product, getting the wrong information when asking for assistance, waiting for approval or holding on the phone. The best way to show that the organization cares is by making it easy to do business with them.

The organization needs to examine their business process and people development. Every business process must be focused on the customer. Business processes must be refined, redesigned, reengineered and revised from the customer inward.

In today's world, there are many ways to improve business processes to help the organization make it easy to do business with them. The business process must be looked at as a complete system. The organization must examine every customer contact point within the organization from customer service center to warehouse to billing, and every method of contact from face-to-face interaction, telephone, fax, computer systems, internet, ebusiness and ecommerce. Every customer contact to a business process must aim for total customer satisfaction.

It is not only necessary to have excellent business systems; you need outstanding people to make your organization easy to do business with. Despite the many technological innovations in today's world, people do business with people. Technology can certainly make it easier for people to do business with people, but people make the difference in every organization. The people in a customer-driven organization must all care about helping customers. They must have a desire to make a difference and constantly grow. These people go beyond being robots. They not only know the "what." They know the "why" they are doing something.

Value – Ensure that it is Easy for the Customer to do Business with You

 **Action:** In the space below, first brainstorm (or best yet ask customers) what makes your organization (or you) difficult to do business with. Put this list in the first column. In the second column, list the things your organization (or you) can do to make it easy for customers to do business with you.

DIFFICULT	EASY

KEEPING CUSTOMERS

Show customers you **CARE**.

Many organizations focus most of their efforts on getting customers. The cost is substantially higher getting customers than keeping them. Once an organization has a customer base, the organization needs to spend time and money keeping customers and growing revenue with current customers. The essence of keeping customers is truly caring for your customers. You must care for your customers. Care means you have unconditional acceptance of your customer as your customer. You want to share with your customers. You want to please your customers. You want mutual trust and respect with your customer. You want to have a relationship with your customer. You want your customer to accept you as you accept them. You want your customer to win when you win.

When your organization consists of one person, caring for the customer depends entirely on you. Organizations usually have more than one person. Therefore the challenge is assuring that each person in the organization cares for customers in the same consistent manner as an owner. The following provides guidelines for keeping customers:


Communicate, especially listen


Attend to customer satisfaction

Respect the customer

Encourage long-term constructive relationships

Show Customers You Care

 **Action:** In the space below, describe how your customers know you care.

 **Action:** In the space below, list some other actions that you or your organization could do to show customers you care.

Care - Communicate, Especially Listen

You have two ears and one mouth for a reason.

Communication of the right information is a complex process including many verbal and non-verbal forms. These include: speaking, listening, observing, writing and reading. Because of this complexity, the information may not be communicated correctly. Even in the simplest communication model with just a sender, message and receiver, there are many obstacles to effective communication. For communication to be effective the sender must be credible, the message must be clear and the receiver must interpret it the way the sender intended. For example, if the receiver does not trust the sender, the sender may not be able to communicate with the receiver. Regardless of the message, communication will be ineffective.

Communication gets even more complex if we add reality to the model. Rarely do we have communication with just a sender, message and receiver. Normally, there are many distractions. We are influenced by our work environment, political pressure or fear. We are thinking about other things going on at home while in the workplace. We have different values, cultures, perceptions, etc. Communication can be improved by the following:

Clarify the message

Observe body language

Maintain everyone's self-esteem

Make your point short and simple

Understand others' points of view

Nurture others' feelings

Involve yourself in the message


Comprehend the message

Attend to the message of others


Talk judiciously

Emphasize listening

Care - Communicate, Especially Listen

 **Action:** From the list below, check your specific communication areas that you need to improve for effective communication.

- Clarify the message
- Observe body language
- Maintain everyone's self-esteem
- Make your point short and simple
- Understand others' points of view
- Nurture others' feelings
- Involve yourself in the message
- Comprehend the message
- Attend to the message of others
- Talk judiciously
- Emphasize listening

 **Action:** From the list of communication areas for improvement, write a specific action you can focus on to make the improvement.

Feedback

Because of the possibility of ineffective communication, it is critical to ensure through feedback that the right information is communicated. It is always the responsibility of the sender to ensure effective communication. Feedback involves providing information back to the sender to verify the communication. Feedback can indicate agreement, disagreement or indifference. Feedback like communication can be verbal and/or non-verbal.

Some guidelines on effective feedback follow:

Foster an environment conducive to sharing feedback

Encourage feedback as a matter of routine

Establish guidelines for providing feedback

Discuss all unclear communications, paraphrase and summarize


Be direct with feedback

Ask questions to get a better understanding

Consider "real" feelings of team members

Keep focused on the mission

Feedback

 **Action:** Find another person in your organization that knows your communication skills. Ask that person to provide you feedback on your communication skills. Practice your giving and receiving feedback skills. Answer the following questions?

What I learned?

What I could do better in the future?

Listening

Listening is a technique for receiving and understanding information. Listening skills are critical to effective teamwork. Listening is one of our most important communication needs but it is the least developed skill. Effective listening requires an effort to understand the ideas and feelings the other person is trying to communicate. An effective listener hears the content and the emotion behind the message. Expert listening requires active behavior. It requires an effort. It requires attention to the person and the message. An active listener attends to not only what the person is saying, but also to gestures, posture, and vocal qualities. It means actively communicating that you are listening and trying to understand the other person. It requires discipline, concentration and practice. Effective listening requires the following:

Let others convey their message

Involve yourself in the message


Summarize and paraphrase frequently

Talk only to clarify

Empathize with others' views

Nurture active listening skills

Listening

 **Action:** Over the next week pay attention to your listening skills. Make notes after any conversation on your listening skills.

Did you talk to much?

Did you interrupt the other person before they were finished?

Did you let the other person know you were interested by verbal or nonverbal clues?

Did you summarize or paraphrase enough?

Did you ask questions to clarify the message?

Did you pass judgement too soon?

Did you put yourself in the other person's shoes?

Care - Attend to Customer Satisfaction

Customer satisfaction is not the same as customer service.

You must pay attention to your customer. If you do not apply your mind during customer interaction, you will lose the customer. You should apply your mind not only meet your customers' needs and expectations, but also even to anticipate customer needs.

You do a disservice to both yourself and your customers if you just give "customer service." For you to keep customers, it is necessary for you to go beyond customer service to total customer satisfaction. The difference is simple. The supplier sets customer service. The customer defines customer satisfaction. Customer satisfaction implies fulfilling the customer's needs and expectations not just by providing the deliverable. By going beyond just servicing customers, you will satisfy both yourself and your customers.

As an example, one company used a Customer Bill of Rights to outline the organization's focus on customer satisfaction

Customer Bill of Rights


Customers deserve and have the right to expect the following:

- ◆ People who care about meeting customer needs
- ◆ Prompt response to inquiries
- ◆ Communication as to availability, shipment or other concerns about an order
- ◆ Quality product and quality service
- ◆ Product just-in-time for their needs
- ◆ Quick and fair resolution of problems
- ◆ Delivery on any and all promises

The best way to systematize attention to customers is by establishing customer-driven metrics and standards for customer satisfaction. What gets measured gets paid attention to and what gets paid attention to gets done.

Care - Attend to Customer Satisfaction

Customer satisfaction is not the same as customer service.

 **Action:** From the customers' viewpoint, what provides customer satisfaction. Write this list in column one. For each customer satisfaction characteristic, find a metric to measure your performance. How are you doing? How can you do better?

CUSTOMER SATISFACTION	METRIC


Care - Respect the Customer

Treat each customer like they would like to be treated.
(Platinum Rule)

Customers want to do business with an organization that respects them. Many organizations take their customers for granted or they dictate to them or they think they are stupid. In short, they do not respect their customers. This is a major error that could be fatal. With a foundation built on respect, a long-term relationship with customers can be established for mutual benefit.

Everyone in the organization must consider the customer worthy of high regard. In summary, the organization should:

- R**espond to your customer(s)
- E**mpathize with your customer(s)
- S**pend time with your customer(s)
- P**roduce for your customer(s)
- E**ncourage your customer(s)
- C**are for your customer(s)
- T**alk to your customer(s)


 **Action:** How can you specifically show your customer respect?

Care - Encourage Long-Term Relationships

When there is not much difference between your product and the competitor's product, the difference is the relationship.

With a foundation built on respect, a long-term relationship with customers can be established for mutual benefit. Long-term relationships grow from rapport and trust. Establishing rapport and building trust with your customers is critical to keeping customers and build a winning organization.

Like all relationships, customer relationships require communication, support and responsiveness. Communication, especially listening, is essential. The customer needs to be involved in as many aspects of the product as possible. Support must be available to help the customer with the product after the product is received. Responsiveness is the key to continuing the relationship. The organization must be able to respond to the needs of the customer in any situation.


 **Action:** With which customer(s) will you try to develop a long-term relationship?


THE CUSTOMER EXPERIENCE

Organizations get and keep customers because of the customer
experience.


Customer Experience


We have all experienced both negative and positive dealings with customers (internal and external). For the purpose of this exercise, you will focus on external customers

 **Action:** In the space below, describe the “worst” experience you had dealing with a “CUSTOMER”

 **Action:** Share this experience with others in your organization. See if others have had a “worst” experience. Describe the “worst” experience your heard.

What Made the Experience Negative

 **Action:** From the negative experiences you and others experienced, what made these experiences bad.

 **Action:** From the customer's viewpoint, what do you think made the experience bad.


The Defense

The “worst” experience highlights some of the issues with dealing with customers. From your experiences dealing with customers and being a customer yourself, what are the major defensive attacks preventing champion customer care. Check all that apply and add some of your own.


- Late on delivery
- Defective product
- Bad service
- Shortage on count, size, and so on
- High prices
- Argumentative
- Difficult to deal with
- Getting the run around
- Not getting what wanted
- Bad attitude


Other

- _____
- _____
- _____
- _____
- _____
- _____
- _____


 **Action:** From the items checked, what are the top five opponents to your becoming a champion customer care. Double check the top five items.


Best Experience

 **Action:** In the space below, describe the “best” experience you had dealing with a customer.

 **Action:** Share this experience with others in your organization. See if others have a “best” experience. You will find that everyone has had a positive customer experience. Describe the “best” experience you heard.

The Lesson Learned

 **Action:** From the negative and positive experiences your and others experienced, what did you learn that can make your future customer experiences good.

 **Action:** From the lesson learned above, what would you list as the characteristics of a customer care champion.


The Offense

The “best” experience highlights some of the positive opportunities with dealing with customers. From your experiences dealing with customers and being a customer yourself, what are the major offensive strategies to achieving champion customer care. Check all that apply and add some of your own.

- Listening
- Focus on customer needs
- Attitude
- Give attention to customer (time)
- Value
- Communication
- Product knowledge
- Empathy
- Respect
- Treating customer like you would like to be treated

Other

- _____
- _____
- _____
- _____
- _____
- _____
- _____

 **Action:** From the items checked, what are the top strategies for you to become a champion customer care. Put a ranking on the the top five items of 1 to 5.

Customer Care Star Characteristics



Action: What are the major characteristics that make a “CUSTOMER CARE STAR.”


Customer Care Leads to Champion Customer Care

From the list of customer care characteristics above, what are the major characteristics you need to develop to become a champion.

“The Customer Is Always The Customer”

The saying “the customer is always right” is not always true. However, the customer is always the customer. Therefore, you must always treat the customer as the customer.

List the reasons why customers are important to you.


 **Action:** Answer the following questions.

Your reason for being in this industry is

Your reason for being with this company is


Your reason for being in this organization is

Your reason for being a _____ is:

 **Action:** Write your purpose statement.

Customer Service or Customer Satisfaction?

You do a disservice to both yourself and your customers if you just give “customer service.” For you to get and keep customers, it is necessary for you to go beyond customer service to CUSTOMER SATISFACTION. The difference is simple. Customer service is set by the supplier (your and organization). CUSTOMER SATISFACTION is defined by the customer. Customer satisfaction implies fulfilling the customers needs, expectations and experience not just providing the product. By going beyond just servicing customers, you will satisfy both yourself and your customers.

 **Action:** In first column, list the attributes of customer services. In the second column, list the characteristics of customer satisfaction.

Customer Service	Customer Satisfaction

Customer Service or Customer Satisfaction?




Action: Compare the items for “customer service” with the items for “customer satisfaction.” How does it compare with your list. Add your items to the chart below.

Customer Service	Customer Satisfaction
Taking information	Providing customer expectations
Answering call promptly	Make it easier for customers to deal with you
On-time delivery	Help customers make money
Quality product	Build trust and long-term relationships
Product information	
Give call backs	
Get quotes	

What Would Satisfy Your Customers?

In the space below, list the specific things your customers want from your organization?

 **Action:** Next to each customer need, expectation or experience listed above mark “E” for essential and “V” for value added. The “E” means items are essential to get the customer. The “V” means items are needed to keep the customer satisfied for the long-term.

What Could You Do Satisfy to Your Customers?

In the space below list the specific things you could do to satisfy customer needs, expectations and experience.



Action: Answer the following questions.

What are you really selling? _____

Why do customers buy your product or service?

What value do you provide that customers cannot get elsewhere?

THE WINNING ATTITUDE

Attitude is everything.

Attitude is the difference between winners and losers. A positive, “can do,” enthusiastic, helping, caring, empathic, “do anything,” mindset makes a winning organization.

Act Positively

Try For Excellence Always

Take Time to Care for Customers

Instill Confidence in Your Abilities

Take Time to Build Constructive Relationships

Use Every Resource

Do Something Special for Customer

Enjoy Helping Customer

Winning Attitude Attracts Customers

The difficult we do immediately. The impossible takes a little longer.

One thing all “winning” organizations have is a customer caring attitude. Organizations that take care of their customers have their customers take care of them with long-term business.

Customers’ value your knowledge and efficiency, but the thing that makes them go away with a smile is your attitude. Your positive attitude makes your customers more likely to have a positive experience. That's very important, to your success. It also makes your job more fun, since most customers will respond to your positive attitude by being positive too. That way you both go away smiling and feeling good.

A winning attitude comes from within each person. It requires at least two essential elements:

1. Communication
2. Developing relationships

List the actions you do everyday to promote a winning attitude:

Communicate Your Winning Attitude to Customers

Your tone of voice, words, facial expression and body language all help demonstrate a winning attitude.

- A warm, friendly, enthusiastic voice lets customers know you're glad to talk with them and you like what you're doing.
- Positive words (" I can, " " I will, " " certainly," "right away") tell customers you're on top of things and eager to help them.
- A smile and eye contact tell customers they're the most important thing in your life right now.
- Good but relaxed posture shows you're confident and open.

List the ways you can communicate your winning attitude:

Winning Attitude Is Contagious

Through the years you have experienced a “winning attitude.” You may have observed a specific action or expression that made you feel special and it make you think the other person was special.

In the space below, describe one situation where the person demonstated a “winning attitude.”

What could you apply to your job from this experience to enhance your “winning attitude.”
