

Improve Your Service

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Note – This is one from a sequence of exercises from the Customer Retention subject outlined in the Strategic Marketing Process eBook. Download the free e-book www.growthpanel.com/marketing-tools/index.html and subscribe to this subject at www.growthpanel.com/versions/get-started.html to download from Growth Panel’s Intelligent Marketing Platform.

Some of the graphics in this PDF might not display properly.

If your value proposition is “customer intimacy,” your customer service is just as important as the actual product that you provide. Even if your value is focused elsewhere, service does still play an important role in your company’s success – customers have certain expectations and if they’re not met, they may easily defect.

Use this table to evaluate the various aspects of your service programs and identify areas that need improvement.

How do your customers place repeat orders, ask questions, or manage their account? Check all that apply, then indicate how important each method is to your customer.

Customer segment	
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METHOD OF INTERACTION		HOW IMPORTANT TO CUSTOMER?	TIP
<input type="checkbox"/>	Personal interaction with their original sales rep	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L	1
<input type="checkbox"/>	Personal interaction with a single account management / customer service rep (same one each time)	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L	2
<input type="checkbox"/>	Call to a general customer service line	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L	3
<input type="checkbox"/>	Self-service on the website	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L	4
<input type="checkbox"/>	Email to general customer service system	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L	5
<input type="checkbox"/>	A product manual or other tools	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L	6

If you have more than one customer segment with different needs and methods of service, repeat this exercise for each one.

Here are the tips for managing and improving each of these areas. You can jump to the tip by clicking the blue tip # in the table above.

TIP #1: PERSONAL INTERACTION WITH THE ORIGINAL SALES REP

Customers like to feel valued. When they continue working with the same person at your company, they know there's a single, knowledgeable resource to help them with any issue.

These tips can help you get started on an action plan to improve the personalized service you deliver to current customers.

ITEM	STATUS	ACTION NEEDED?
Are your sales reps paid commission on renewals? If they aren't, they'll prefer to spend their time chasing new business commissions.	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Are your sales reps earning more commission on new business rather than renewals? If they make more by generating new business, they usually won't spend enough time managing current accounts.	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you know how frequently your reps speak with current customers?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Are your sales reps proactive in reaching out to current customers to help them improve their business?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do your sales reps have a great attitude and passion to focus on your current customers? (If they don't, it will show.)	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Are your sales reps truly involved in your customers' businesses? (Rather than acting as simple order-takers?)	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
When something goes wrong, are your sales reps empowered to immediately make it right?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do your sales reps offer some sort of value that your competitors don't offer?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you regularly evaluate your reps on their ability to manage existing customer relationships?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you use marketing campaigns to supplement the personal involvement with your sales reps?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

Do you create an account management plan and set goals for each new account? With a tangible plan, your account managers know what's expected and can work toward specific goals.	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

If you checked YES for "Action Needed" in the grid above, put those items into an action plan below.

ACTION NEEDED	NEXT STEPS

TIP #2: PERSONAL INTERACTION WITH AN ACCOUNT MANAGER

If you typically use an account manager or other sales assistant to work with existing customers, here are general tips for evaluation & improvement.

ITEM	STATUS	ACTION NEEDED?
Are your account managers paid commission for renewal revenue? (It's a powerful incentive and ensures that they take a more proactive role in trying to expand relationships.)	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you have a system for regularly trying to grow each account?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Are your account managers enthusiastic and excited to work with their customers? (If not, it will show.)	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do your account managers have the skill set and acumen to quickly resolve problems and to include the sales rep or a manager when needed? If not, make sure they feel comfortable seeking help – if they're penalized when something goes wrong, they may let it fester.	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you regularly evaluate the performance of your account managers to make sure their customers are happy?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Regularly evaluate customer loyalty to see how well you're doing and identify areas for improvement. [Exercise 394 can help]	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you have an internal recognition program for your team – for example, giving a monthly award to the person who does the most	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

for a customer? It can help to create a more positive environment that's more focused on the customer.		
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If you checked YES for "Action Needed" in the grid above, put those items into an action plan below.

ACTION NEEDED	NEXT STEPS

TIP #3: IMPROVE YOUR GENERAL CUSTOMER SERVICE LINE

Most people don't like placing a call to a general customer service or order center. It can be extremely frustrating to navigate multiple menus, wait on hold, and end up talking with a rep who can't answer a particular question.

Inbound call handling is a complex subject, but here are some basic tips to get you started. If your customers order by calling a specific account rep directly, you can skip this section – it's designed for general call centers.

ITEM	STATUS	ACTION NEEDED?
Can your customers find the phone number within one click on your website?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Is the customer service number printed on all of the other marketing materials a customer would have handy?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
If your center isn't open 24/7, do you print your hours next to the phone number every time?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you know how many calls come in after hours so that you can adjust your hours if the volume demands it?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you know your average wait time and how it compares to other companies in your industry?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you know how many of your callers "abandon" (hang up) before getting to an operator?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
If you use a recorded menu, is the greeting as short as possible?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

If you use a menu, can a caller get to a live operator by hitting zero?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Can a caller get to the correct department with 2 or fewer keystrokes?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Are your reps trained to correctly handle any caller? (Customers are easily frustrated when their calls are transferred.)	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
If a customer calls outside of your business hours, can they leave a message?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
If you take messages, are they returned during the caller's business hours on the very next business day?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you regularly place test calls to evaluate the performance of your reps?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you have a formal quality assurance system to measure the performance of your reps?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you have a system to immediately elevate an unhappy customer to a more experienced rep or a manager?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Is your call center a positive, happy environment? If reps aren't happy, it's not going to come through in their voices.	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

If you checked YES for "Action Needed" in the grid above, put those items into an action plan below.

ACTION NEEDED	NEXT STEPS

TIP #4: IMPROVE SELF-SERVICE ON YOUR WEBSITE

It's important to truly understand your customers' needs when they come to your site. How strong is the service area of your website? If it quickly delivers the information and functionality they need, you can meet or exceed their expectations. If your site is frustrating or doesn't offer all of the functionality they expect, you may be letting them down.

If website self-service is very important to your customers, consider asking a group of them to respond to a survey. Companies with large budgets often conduct formal “usability studies” where they invite users to perform certain tasks on a site as they watch and take notes, but those studies can be very expensive and are most appropriate for complex e-commerce / consumer sites or software.

What service functions can the customer currently accomplish on your website? List all of the tasks below:

#	TASKS THE CUSTOMER CAN ACCOMPLISH ON THE SITE
1	
2	
3	
4	
5	
6	

If you want to evaluate usability on your own, take it for a test run or ask someone who is less familiar with it, then sit with him or her as she attempts each task. Be as objective as possible and note:

1. How many steps did the task take to accomplish?
2. Were the instructions clear and obvious?
3. Was it easy to do?
4. Did the result meet your expectations?

Task #	ANALYSIS			
	# of steps it took	Clear, obvious?	Easy?	Meet expectations?
1				
2				
3				
4				
5				

ANALYSIS				
Task #	# of steps it took	Clear, obvious?	Easy?	Meet expectations?
6				

What additional things do you think the customer wants to accomplish but can't?

DESIRED INFORMATION, TOOLS, FUNCTIONALITY?	How important do you think this tool would be to your customers?

As a result, are there any improvements that will improve your customers' experience with you and potentially improve their satisfaction and retention? Think first about things that are most important to the customer and that can be fixed within the shortest period of time.

IMMEDIATE RECOMMENDATIONS	NEXT STEPS

Now think more broadly about the longer-term, more expensive or more substantial changes you think can be made. If you think you should do more thorough testing or research before implementing major changes, you can list that research as a "next step."

LONGER-TERM RECOMMENDATIONS	NEXT STEPS

Simple tips for your site

Here's a list of quick and basic tips that may be relevant for your site.

ITEM	STATUS	ACTION NEEDED?
Is there a prominent link to the login on your home page?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Can a user find the information s/he wants within 2 or 3 clicks at most?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Is it obvious for a USER to find the desired information?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Is your content on the site itself, or do you force the user to download PDFs or documents? (Offer it both ways if you want them to have a downloadable version.)	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Does each of the pages of your site load quickly?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you regularly monitor for errors that may be occurring on your site?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you monitor the traffic patterns and page views to better understand what your customers are looking for?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
If a customer has to fill out a form on your site, is it obvious which fields are required?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Are error messages written in straightforward language that a user will understand? (What's obvious to a website developer may not be obvious to a user.)	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Is the writing short with bullets and subheadings instead of long paragraphs?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Is there a prominent link to your contact information (not buried within the help or FAQs)?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Is there a prominent link to the help section from every page?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you offer multiple ways to contact you (email, phone)?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Is it easy to find answers to the most important questions in your FAQs?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Can a customer easily contact you if the FAQ response doesn't answer the question?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Does anyone monitor the use of the FAQs?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

ITEM	STATUS	ACTION NEEDED?
Are the FAQs short and well-written ?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you use an online satisfaction survey for selected customer transactions (if appropriate)?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
If your customers have to enter a login, do you offer them a password reminder to enable them to complete their login rather than call or email you if they can't get in?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you have a system to immediately elevate an unhappy customer to a more experienced rep or a manager?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Does your checkout system use 3 or fewer screens?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you monitor where customers abandon during the checkout process?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you store the customers' information so they don't need to re-enter it for future purchases?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

If you checked YES for "Action Needed" in the grid above, put those items into an action plan below.

ACTION NEEDED	NEXT STEPS

TIP #5: IMPROVE YOUR EMAIL CUSTOMER SERVICE

ITEM	STATUS	ACTION NEEDED?
Can a user find your email address within 1 click of the home page?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you tell the user how long you typically take to respond?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Is your response time within one business day?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you track the number of messages and their subject matter so	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

ITEM	STATUS	ACTION NEEDED?
that you can prevent those problems from occurring in the future?		
Can your reps successfully resolve any question via email without telling the customer to call or contact someone else?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Are your responses clear and well written ?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you measure whether your response has successfully resolved the customer's issue?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you have a system to immediately connect an unhappy customer to a more experienced rep or a manager?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you regularly write test emails to measure the speed and quality of your responses?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you ask your customers for feedback on the effectiveness of your response?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you send a helpful, friendly confirmation email immediately upon receiving the original message?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

If you checked YES for "Action Needed" in the grid above, put those items into an action plan below.

ACTION NEEDED	NEXT STEPS

TIP #6: IMPROVE YOUR PRODUCT MANUALS OR TOOLS

ITEM	STATUS	ACTION NEEDED?
Have you asked for feedback on the effectiveness of your instructions, manuals and/or tools?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Are your instructions written in simple, straightforward language ?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Do your instructions use subheadings and bullets instead of long	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

ITEM	STATUS	ACTION NEEDED?
paragraphs?		
Do you use images whenever possible instead of words?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Is there a table of contents and an index so a user can immediately jump to the relevant section?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

If you checked YES for “Action Needed” in the grid above, put those items into an action plan below.

ACTION NEEDED	NEXT STEPS

SUMMARY: GENERAL PRINCIPALS

ITEM	EXAMPLE	STATUS	ACTION NEEDED?
Focus on your customers’ actions	Does your customer survey incorporate open-ended questions and language like the survey above?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Make sure that your customer service is reliable and trustworthy	Do you always deliver on promises in the time frame stated?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Don’t promise what you can’t deliver	Do you promote additional services, but not perform these new services very well?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Don’t try to be all things to all customers	Which business are you most like? <ul style="list-style-type: none"> ▶ An organic food store that focuses on the freshest foods available ▶ A giant supermarket that offers video rentals, haircuts, banking, etc. <p>If you’re trying to do too much, the quality of your individual offerings may suffer; your</p>	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N

ITEM	EXAMPLE	STATUS	ACTION NEEDED?
	customers may also be confused about what you do.		
Be passionate about your customers	Are your service reps excited to help your customers? Do you let them go above and beyond the call of duty to make your customers happy?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Always deliver more than you promise	Can you list several examples of how your team went above and beyond the call of duty to help a customer?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Master each change before trying a new one	Are you reliable and efficient with all of your current services? If not, which ones need improvement?	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N