



# Training Manual

## SECTION 6: CUSTOMER SERVICE TIPS



**Merchant Service Group, Inc.**  
With every transaction, every service,  
every product, we put your needs first!

Merchant Service Group, Inc. | 6901 Jericho Turnpike, Suite 240, Syosset, NY 11791  
Toll Free: (866) 403-0294 | Fax: (800) 861-1442 | Email: [agents@gomsgagents.com](mailto:agents@gomsgagents.com)

# Customer Service Standards

## CUSTOMER SERVICE - QUALITY ASSURANCE

We recognize the importance of a customer service department that is responsive to your needs. We understand that timely, correct answers to technical questions, setup questions, or even simple "How do I..." questions are paramount to achieving maximum success with any business application.

<b>Opening of the Phone Call</b>	<b>POINT VALUE</b>
Identifies Customer Service/Tech Support	01
Gives Name	01
Obtains Account	02
Verifies Account Information	02
Offers Assistance	01
<b><u>Problem Identification</u></b>	
Utilizes active listening skills	04
Acknowledges restate concerns	02
Uses probing skills	04
Effectively utilizes resources	04
Correctly diagnoses problem/concerns	05
<b><u>Problem Resolution</u></b>	
Gives accurate information	03
Gives complete information	03
Reviews action taken	03
Escalates/transfers properly	01
Educates customer / prevents call-back	03
Makes effort to resolve on first call	02
Makes accurate / complete notes	05
Takes appropriate action	05
<b><u>Style and Courtesy</u></b>	
Projects friendly tone	03
Courteous, polite, professional	03
Shows empathy and apologizes	03
Projects confidence	03
Gives proper time and attention	02
Addresses customer by last name, proper title	01
Uses proper language/grammar	01
Controls conversation	02
Asks for permission to put customer on hold	01
Makes proper use of hold feature	02
Thanks customer for holding	01
<b><u>Futures/Saves</u></b>	
Recognizes opportunity, probes to determine needs	05
Recommends products to meet customer needs	05
Conducts clear, concise presentation	05
Identifies, attempts to overcome objections	05
Asks for the sale and validates address	05
Gives appropriate closing	02

**Total Score = 100**

## Phone Etiquette

Answering the phone: The following ways are considered polite, business like ways to answer the phone.

The greeting can be vital to the way your call will continue. A positive greeting can produce a positive call if the customer is already upset. An insensitive or sarcastic tone may just make the customer more upset and the situation worse. Let the customer hear your smile.

"Thank you for calling ABC company, this is \_\_\_\_\_ how may I help you?"

"ABC Company, this is \_\_\_\_\_ speaking how may I help you?"

When speaking with a customer: Do not use slang or jargon.

Sound knowledgeable. When on a call with a customer, you want the customer to feel comfortable in knowing you can, and will, take care of his/her problem. The use of the word umm, or I don't know may give the customer the impression you cant help them, or don't know what your doing.

Use proper English. Slang can be considered anything from y'all, uh huh, huh, yeah, wait or street lingo. All of these phrases make for a very unprofessional conversation. Jargon may be words that you know the meaning of but the customer may not. For instance technical terms for things in our database or system, abbreviations, words and phrases that may be inter-office terms that the customer might not understand. These can confuse the customer and make for a frustrating phone call.

How to put someone on hold, or remove him/her from hold:

Ask the customer if you can put them on hold. "Can you hold please?" or "May I place you on hold?" And then wait for a response; don't just hit the hold button, they may have something more to say.

Continuing a hold. Always ask for the customers' permission to place them back on hold. Say: "I appreciate your patience, but it will be a few more moments. Can you continue to hold?"

Returning to Call. When removing someone from hold, some phrases that may be used are: "Thank you for holding", and "I apologize for the wait".

Try to limit hold times to 3 minutes. Long waits with no contact only increase a customers' frustration.

## **Customer Service Script**

“Thank you for calling Customer Service / Tech Support.”

“This is \_\_\_\_\_ speaking, how may I help you?”

“Is there anything else I can assist you with today?”

IF NO:

“Thank you for processing through us, have a nice day.”

## **Giving Your Customers Your Best**

1. Go the extra mile for your customer.
2. Find ways to give them more than they expect.
3. Even if there is no competition for your business, your customers deserve the best service.
4. Treat your customer the same way you would treat an honored guest invited into your home.
5. Make the customer feel welcome.
6. After the business transaction, make some follow-up contacts to insure your customers are satisfied. Choose customers who may not have been totally pleased, as well as those who may have additional needs. This is a great way to make your customers remember you.
7. Appreciate every customer you have. Tell your customers you appreciate their business.
8. In multi-cultural situations, be respectful of the cultural differences.
9. When there is a problem, try to see things from your customer's perspective. You'll be surprised how often the customer is right.
10. Treat the customer you are helping as though she were your only customer. Do not allow yourself to be distracted.

## Customer Care and Quality Service

The only way for you to keep your customers is to provide the best possible service. You must get close to your customers. Build a strong relationship with them.

Do you really know who your customers are?

What do they do? What are their needs?

How do you fit in with them?

What does it take to please them?

How can you make their lives easier?

What is customer service? And who defines it?

The customer decides what it takes to make him satisfied. It is up to you to ask your customer what it takes. As the manager, never accept or tolerate less than the best customer service from your customers. Everyone in your organization is responsible for customer service. Service does not stop with the people who regularly talk to customers.

Whether or not your employees have a direct link with the customer, they all have an effect on customer service. It is very important that each of your employees understands this link. It is very important that all of your employees have an understanding of what everyone else in the organization does. Your employees will have more respect for each other if they have an idea of what the other employees do. Good service can only be achieved when each employee feels personally responsible for satisfying each customer.

Customers appreciate the following qualities in an employee:

- Courtesy
- Knowledge of services and products
- Reliability
- Decision making ability
- Availability

Do you measure your employees on these qualities?

Customers will generally remember your company in two instances: When the product or service is particularly poor, or When the product or service is extremely good. How are your customers remembering your company?

## Customer Service Tips

A Bizrate.com survey found that 45% of the time that customers call into customer service is to check the status of their order. Why not make it possible for your customers to find their own status rather than having to ask you? An order-status lookup capability on your web site is an extra benefit and convenience for your customers.

A great question to ask during an interview is, "Did you ever have to say "no" to a customer's request, and if so, how did you say it?"

Sometimes a customer will veer off the track a little bit. To get him back on track, wait for a pause in the conversation, take control, and then get back to where you need to be. To take control without seeming pushy or rude, take a piece of the customer's conversation, address it slightly, and then get back on track. Remember to control the conversation, NOT the customer!

Treat all complaints seriously. Customers who complain are giving you a second chance to satisfy a dissatisfied customer. Don't let this opportunity slip away.

Never say to a customer, "You'll have to..." This comes off as pushy and, quite frankly, your customer doesn't have to do anything. Instead, try saying, "Would you mind..." or "Could you please..."

Spel chekerz, hoo needs em.

Slow modems are not a thing of the past. Countless customers are still using dial-up modems. Make sure your website is designed with that in mind. High resolution graphics and high-bandwidth plug-ins prohibit sites from loading quickly. Quick page downloads are a must.

Each customer who sends you an email thinks his question is the most important question ever asked at your site. And he is right!

If you offer email support, make sure you clearly state your service level. As a courtesy, let your customers know how long they should expect to wait for a reply.

The shorter the click-path from your home page to your customer's destination, the better. You don't want it to take more than three clicks to get to their desired page.

When designing a web page, don't forget the importance of customer service. Put a "Help" button on all pages that gives your customer quick and easy access to the information they need as well as multiple options to get in touch with you if they want to.

Give spoken feedback signals. Saying words such as "Yes", "O.K.", and "I see" will show the customer that you are listening. This is especially important when talking on the telephone because there are no ways to see this visually.

Don't eat, drink, or chew gum while speaking on the telephone. Remember, the mouthpiece is a microphone and your customer can hear every annoying noise you make.

You can improve your customer's listening skills by using his name. Don't we all respond to the sound of our name? Even if your customer's mind is wondering, calling their name will pull their attention back to the matter at hand.

Don't over-promise. If you are not 100% sure that you can do what you tell your customer, then don't say you will. It is better to under-promise and over-deliver than the other way around.

Don't think how expensive it is to train employees. Think how expensive it is to not train them.

Follow up on all dissatisfaction. After you have addressed a customer's problem, call them in a few days to make sure what you said would happen did, in fact, occur, and that they are satisfied with the solution. If a phone call is not possible, then sending a personalized email or letter will suffice.

Customer loyalty is a key to survival, especially in the online world. To measure how loyal your customers are, you must survey them across every touch-point they interact with your company (website visits, email responses, product orders, etc.).

The world of service is no longer just phone and email. Customers now expect other options to get help, such as self-help, where they can find their own answers, and live chat, where they can instantly be connected with a service representative.

There is no bigger room in the world than the room for improvement. Never think you have all the skills and knowledge necessary to do a good job. Everyone can improve.

Toll-free support numbers are not enough. E-customers expect a variety of options for them to get help.

Not having a return policy is one of the biggest detriments to customers buying online. You must have a fair policy that makes it easy to return damaged or unwanted purchases.

Make sure to personalize all emails to customers. Don't start with "Dear customer". Instead, use their name, like "Dear William" or "Dear Mr. Richards". Also, when closing, make sure you put your name and phone number / email address instead of "Customer Service Department".

Don't end any call before its time. Just because you think the call is over, your customer may have additional questions. Always ask, "Is there anything else I can do for you today?"

After you fix a problem, make sure you give your customer a little something extra. It doesn't have to be expensive, just something to show that you are sorry the problem occurred in the first place. This lets the customer know that you consider the mistake, whether large or small, was unacceptable and that you care about them remaining your customer.

Listen to your customers--they will tell you how to address them. For example, if a customer says, "This is Doctor Smith", address him as Doctor. If she says, "This is Mrs. Jones", address her as Mrs. Jones. And if he says, "This is Tim Washington", you could play it safe and call him Mr. Washington, or ask permission to call him by his first name: "May I call you Tim?"

The most important time to hold your temper is when your customer has lost his.

Place a mirror near the telephone where you can see yourself while talking---that is how you look to the other person you're talking with.  
(Courtesy of Henry A.)

To keep you from sounding disinterested while speaking on the telephone, make good use of inflection. Vary the pitch to keep your conversation interesting. For example, slightly raise your voice to emphasize the important points.

Be careful with automation. There is nothing wrong with easy-to-navigate phone trees or automated trouble-shooting programs that work. But these systems must be backed up by a real person in case the automated process fails.

Failure + Failure + Failure = Success - (Courtesy of David K., Riverside, CA)

Give solutions, not excuses. Instead of giving your customer a bunch of excuses why you can't do what he is asking, try to work to a mutual solution. And follow up on your promises. Customers don't expect that.

To help become more of a customer service team player, work hard to overcome any weak areas of your knowledge so your co-workers won't have to pick up your slack.

After your customer interaction is finished, he will do 1 of 3 things. He will say nothing at all, say something bad, or say something good. Remember, YOU have the power to set which direction your customer will take.

If your employees aren't happy, how can you expect them to keep your customers happy.

If the customer says it... he believes it!  
(Courtesy of Wayne M., United Kingdom)

Treat customers exactly how you wish to be treated when you are the customer.  
(Courtesy of David K., Riverside, CA)

A dissatisfied customer is more likely to tell ten people about the poor service he received. A satisfied customer will probably only tell one person.  
(Courtesy of Richard S., San Jacinto, CA)

Listening helps you figure out what your customer wants and needs. He is actually telling you what it will take to make, and keep, him your customer. It doesn't get any easier than that.

When you can't provide your customer with something he wants, when you have to say "no", offer him an alternative. This shows that you are willing to work with him.

Don't forget to say "thank you" to your customers EVERY time they compliment you or your company. As we all know, you don't receive many complements in your line of service, so when

you do receive a compliment, thank the customer!!

A study done by the Rockefeller Foundation showed that almost 7 out of 10 customers went to the competition (even if they had been doing business with that company for years) because of poor customer service. You have the power to keep customers coming back.

Always be learning. The top customer service professionals are always in training, always looking for ways to improve their service, always on the look-out for the changing needs of their customers.

Remember that there are two types of customers: external and internal. We all know the external ones. These are the people who buy our products and services. The ones we seem to forget about are the internal customers, our co-workers. If you think about it, aren't there times when they are also your customer, and vice-versa? They shouldn't be treated any differently than the paying customer.

The customer service professional should be willing and eager to help. They should have one goal in mind: Exceed the customer's needs.

When customers want service, they want it NOW. You must be accessible and willing to help whenever a customer needs you.

You should review common procedures, rules, and regulations. At least know where to find this information. That way you won't have to interrupt a co-worker or keep a customer on hold to find the answer.

Go the extra mile. By doing the small, unexpected things, those acts will be remembered by your customer as something your competitor doesn't do.

## 7 Principles of Relationship Building

1. When the sales representative/merchant relationship is right, the details are negotiable. If there is tension in the relationship, something is wrong and the details become obstacles.

Tip: Build strong, open relationships with your merchants.

2. When there is little difference between what you and your competitors offer, there should be a big difference in the way you deal with your customers.

Tip: Never demean your competition. Treat your merchants with respect and offer them the information and guidance they need to make a solid business decision that is right for their needs.

3. Sales and service are like medicine: Offering a prescription before a diagnosis is a form of malpractice.

Tip: Listen to your customers' needs first, despite your enthusiasm about any single solution.

4. We judge ourselves by our intentions, but others judge us by our actions.

Tip: Make promises you can keep, and keep your promises.

5. Professionals are no longer determined by the businesses they are in, but rather by the way they do business.

Tip: Build professionalism. The more comfortable merchants are with the products and services they purchase from you, the more professional you will seem in their eyes.

6. One sincere gesture can do more for your business than thousands of dollars of advertising.

Tip: Go the extra mile for your customers. They will remember your effort and buy from you again as well as refer new customers to you.

7. People truly don't care what you know until they know that you care.

Tip: Show your customers that you care about their business' success by demonstrating your listening skills.