

The Customer Service Managers Best Practices Handbook

These techniques are not just “good ideas” or “theory.” They are the result of practical application, techniques I have used or I have seen demonstrated and of course, from the greatest teacher of all, learning by mistakes. Trust in the knowledge that you do not stand alone at the altar of past mistakes, as I have been there many times before you.

This book is an attempt to keep you from standing there as long as I have.

These days I spend a lot of time in seminars and workshops listening to the same scenarios played out again and again. I started thinking that if I could just write out 5 areas for improvement and then gave some practical applications, you might benefit more than reading some book on “theory”.

I don't know about you, I just don't have the time to read a theory and then attempt to make it work. I just want answers. Hopefully, you will find the answers to the questions you have, here.

Chapter 1 What Do I Teach 1st?

1. **Teach Etiquette and Courtesy.** This is a teachable skill and it becomes habitual through practice. When we practice etiquette and courtesy we are saying to our customers that we value them. It is also the human currency necessary to begin the open exchange of feelings and build relationships. Let's start with the basics of courtesy.

A. Courtesy and Etiquette begin with smiling. It is the first thing people see. They “hear you” with their eyes long before you begin to speak to them. If you want someone to listen to you, smile at them 1st.

B. Say your name and introduce yourself. Be the initiator in the interaction. Include your department or function. End the greeting with an inquiry of their name and a friendly, open smile.

C. Say the words you grew up with. They include “May I?”, “Thank You”, “Please”, “Good Morning, Afternoon or Evening”, “Is there something else I can do for you today”, “Were there any other concerns that you had regarding _____?”, “Is there any reason you would not recommend my service, if so, may I have an opportunity to correct it?”. All of these are more than just plain good manners. They demonstrate a real concern for your Customer and their experience with you and your organization.

D. Be friendly and enthusiastic about the job you do. There will be times when doing the right thing is not easy or fun. Maybe you and your Customer

did not see eye to eye on an issue. It's ok. A thoughtful, caring and enthusiastic Attitude towards your Customer will carry the day. Acknowledge the issues between you and then resolve to provide a solution, the real reason they are in front of you in the first place.

2. **Teach Them to Greet Properly.** This is the 1st step in the process and so often completely overlooked. We assume that everyone knows how to give a proper Greeting and this is simply not the truth. Have you ever purposefully entered a store or place of business and then waited to be greeted by *ANYONE* at all that even remotely looked like they worked there? How did that make you feel about the service you were about to receive? My guess is a little fearful about the whole experience plus now a little angry because you were not treated "properly." Are you doing this to your Customers now? Make sure your staff is the *FIRST* to *GREET* someone not the *LAST!* Include the basic 5 steps as follows.

Smile, say your name and ask them for theirs and use it.

Tell them your function.

Tell them how to get the best from your service.

Ask for feedback on their experience

Invite them back.

- a. *I can't say enough about Smiling. It is the single most important signal you can send anyone. It even works on the phone. Just try not smiling for awhile and see what happens. When we say our name and ask theirs, it demonstrates interest in the other person. When we follow it up with a description of the service we provide, it just completes the picture of someone that is genuinely interested in helping. As Customers, we can't resist a friendly, open smile followed by a warm greeting.*

3. **Teach Them Conflict Resolution Skills.** Conflict Resolution is really *active* listening combined with solution language to address points of mutual interest while not pushing your own agenda. Guess what? They already know what your position is; it's the reason why you have a conflict! And here is the secret. ALL CONFLICTS are conducted in areas of interest. Conflict resolution can be broken down into two main areas.

Listening.

So let's talk a little about listening skills. Everybody can learn to practice active listening. It consists of two processes. First, we listen without distraction to the other person, and then we paraphrase back

to confirm understanding. Once we have a complete grasp of the situation, we can move to identifying the best possible solution. Active listening is work. You must make a commitment to really focus on the other person.

You can do this by mentally saying to yourself “Focus on the person” several times if your mind starts to wander. You can take notes. It’s best to stop all other activities that are not related to active listening.

Some of these activities include working on the computer, talking on the phone, interrupting the other person to answer questions from another person not in your conversation, making stop signs and gestures with your hand or using other non verbal signals to let the other person know that you have stopped listening, finishing the other persons thoughts, telling the other person you “got it” and then offering your opinion.

Next, we practice the “2 to 1 Rule” in communications. Here is the rule. “Listen twice as much as you talk.” What will happen is you will start to hear what you have been missing, and just maybe, hear your Customer as well.

Now you can confirm your understanding by paraphrasing back to the other person a synopsis of what you heard. A synopsis is your understanding of the facts as they relate to your conversation with the other person. It is not an opinion, an opening to interject your ideas, a dismissal or a statement that consists of grunting noises. It is your opportunity to connect and confirm.

Offering Solutions.

Let us be completely clear on this. This skill is not about winning. This is about finding and offering a solution that may or may not be accepted by the other party. It is Assertive, straightforward and more often than not, leads to greater understanding. There are a few guidelines that need to be followed.

First, have positive intent. This is the belief that you and the other party want to both come to an equitable resolution. This may be the single most important thought you need to have when you are attempting to resolve a Conflict.

Second, use Assertive Communication Skills. This means understanding and using “I” statements to convey your solution, respecting other people’s rights to disagree and really making a commitment to finding a “win/win” solution for both parties. Frame your solutions in positive language and ask for feedback.

It may sound like this. “Bob, I would like to offer a solution I think we both can agree on. Take a look at this, and tell me what you think.” Even if Bob does not agree with the proposed solution, it gives you an

opportunity to ask for additional thoughts and really find out what the real problem is.

Remember, in Conflicts, most people (inc. you and I) play our cards close to our chest in order to protect whatever perceived advantage we have in the Conflict. Be the first to show your trust in this person and tell them straight up what you hope to accomplish. In order to start this process, script out the 5 most common scenarios your personnel and company usually deals with, and then practice with a partner. This scripting and practicing is critical to mastering this skill.

4. **Teach Them Negotiation Skills.** This is a skill that is needed after a conflict has been engaged and a solution is offered without the desired result. Bottom line, they didn't like what you said and now you have to "Negotiate" a new resolution.

Negotiation can be a complex, intense interactive process that can result in a change in the other person's behavior towards you and your organization. The key is to remember what we said earlier about positions and interests, and focus on the interests and not the positions. Successful negotiators know exactly what they can and cannot do, and are firm in their resolution to come to either a consensus or an agreement.

Be aware that in some cases, the consensus or agreement may not be at all what you consider reasonable to begin with. Successful Negotiators do not take "positions" that require the other person to "conquer" them or "scale the wall." They are ready to end the conversation amicably, and without forcing acceptance by the other person if they realize there is not appreciable progress and further communications will result in a complete breakdown.

Here is the secret to successful Negotiations and Excellent Customer Service.

Know exactly what level of authority you have and know exactly what you can say and do in order to resolve the conflict and then follow through.

The real "power" in any negotiation is when you are completely sure exactly how you will respond, and not allowing your emotions to start speaking for you. Becoming emotional will negate any progress and end the communication without resolution.

Sometimes in these conversations one or both parties develop Tunnel Vision. When that happens, it is better to break away, make a date and time for later conversation and then follow through. Use the time between to try to understand the other person's interests and then script out what you would like to happen.

Identify the most common resolutions, craft the language that conveys exactly what you can and will do and ask for acceptance. Practice these Negotiations with role play. It's through practice sessions that you and your staff gain confidence to handle any situation you might face.

5. Teach Them Relationship Building Skills. Customer Service Professionals that really take the time to build Relationships are always busy, even in slow times. They do this by constantly putting themselves in their Customer's shoes and seeing the Service they provide from their Customers point of view.

They practice Courteousness; they ask for Feedback and believe in addressing Customer Concerns immediately. It's because of the way they conduct their business that they have more business than everyone else. They are in a constant state of self examination and are never satisfied with their performance.

They also *ask* their Customer for their future business. They do this by saying things like "Here is my card Ms. Jones, and I've highlighted my number right here. If there is anything you need, please call me immediately" or "I've taken the liberty to put a reminder in the computer for your next appt. and I went ahead and put that here on my business card as a reminder for you." Just thinking and doing one little thing like this guarantees repeat business and solidifies your position in their mind as a valuable person and one they should know.

Here is a little secret most people don't do. Take the time to write out exactly why anyone would want to do business with you. These are not slogans or marketing ploys. These are the difference between you and your competitor. Have 5 top reasons and be ready to recite them anytime. This alone will give you confidence to ask for repeat business and tells the Customer that you know your Service and your Business.

Chapter 2

How Do I Teach These Skill Sets?

Everyone has a different style of learning, from kinesthetic to auditory, and everything in between. This chapter deals with the Top 5 Ways to Teach These Skill Sets and in keeping with the simple theme, is easily implemented. Before we get too far into this, make sure you have taken the time to develop a training plan. You and your staff need to know exactly what the training will include and the goal, the “why” we are training.

1. **Demonstration.** This technique includes the auditory, kinesthetic and the visual learner. It is the by far the most used and abused method of teaching. The reason it is abused, is we always assume that the other person is just like us, and “if it was good enough for me when I came here, it’s good enough for you,” which is not the case at all.

Also, we assume that merely by demonstrating something once or twice, we have done our job. I don’t know about you, but there are times when I have been able to “get it” with one demonstration and other times when a thousand demonstrations would not have been enough. When we use effective demonstration techniques it enhances and adds to the learning experience without demoralizing or degrading the learner.

So, the first step is (you’ve already heard this) “Have Positive Intent.” Begin the process by becoming eager and confident in your role as a demonstrator and leader. It is through your leadership that your company lives past the “teachings” and thrives with the life you breathe into it through your training.

Really think about that. The demonstration and skills you teach will continue long after the class has ended. There is no more powerful legacy to leave your company with, than the knowledge and satisfaction that you had a hand in the growth and success of that company after you leave.

Remember, it’s much easier when we have a system. This system has been around awhile, yet it is still relevant and it still works.

It is called the “I say I do” system. Begin by demonstrating and talking your way through the task, and having the person you are training very close by, watching every move. This is the first step, called “I say I do.” Walk through every step, taking the time to show, and even backtrack. Remember, although you may have done this one bazillion times, they have never done it. In fact, the whole concept of what you are teaching them may be completely foreign to them.

The next step in the process is “I say you do.” In this step you walk back through the task, having the person complete each step while you talk them through it.

Take your time, have patience. If they show signs of becoming frustrated, take a quick 5 minutes, compliment them on what they have achieved and then restart.

The next step is the “You say, you do.” This part of the learning process is where they tell you what they are doing while completing the task, with minimal interference from you. It allows them to work out internally while verbalizing the steps necessary to complete the task and tells you exactly what they understand and don’t understand.

The last step is called “You say I do.” In order to confirm in your mind that the person you are training understands what is expected, you need to have them “teach” you what they have just learned. This step is crucial in cementing the new task and has an extra bonus. It gives you confidence that this person knows what to do. These four steps, completed properly, is just the ticket in demonstrating properly how to do something.

2. **On The Job.** There are organizations that practice sink or swim. They toss you into the scrum and see what comes out. This is because they believe you have the skills or you led them to believe you have the skills when you interviewed for the position, promoted into the position or this is “just the way we do things around here.” OJT can be scary if you do not have a “go to”, a person you can ask questions and get advice from, as you figure it out. OJT is the ultimate validation of your professional self. It may or may not include demonstrations and it may or may not include mentoring. Most organizations include mentoring, as they would like to see you succeed.

Here are a few ways to make OJT a little more effective for your organization.

First, make sure they/you understand the expectations of both parties. Most people have difficulty reaching ambiguous or unclear goals. The old saying is “the devil is in the details” and it is here that you and your protégé will fail if there is not a clear, specific course of action for you to take.

Second, read or have access to the Standard Operating Procedure. This could be a job description, policies and procedures manual, station rules, whatever they/you can lay their/your hands on that will give them/you information about the position. Verify they actually read it. Have a small pop quiz or other method to make sure they have put the time in and have a base of knowledge to draw from. Here is a secret. *Read your Managers/Executive’s SOP.* It will give you insight that most people don’t take the time to gain for themselves.

Then, give clear instructions and assign a mentor. This person needs to take the extra effort and really explain all the details. This is not for the other “new people” to teach and mentor.

Next, have a timeline for mastery that you and the person agree to. It might be that during initial start up and acclimatization that this timeline is flexible. That's ok, as long as you both agree to it and you both are clear.

Finally, Celebrate! Celebrate when each new portion of the task is learned and a new one is started.

3. **Role Play.** This is a great teaching tool, and one most people do not invest a lot of time in. They mistakenly believe that it takes more time, is difficult to implement and turns into non productive time. Yet, role play done correctly, consistently produces better results, faster, because mistakes are clearly corrected before they interact with Customers on a (here is the key word) "Professional" basis. Whenever they work with your Customer, they are representing you "Professionally." Wouldn't it make sense to have them practice with you before they start to practice with your Customers?

Role play requires a couple of things to be effective. Begin by writing out the scenarios your new Professional might face. Then write out a brief practice script. This would include the right language you would want them to use. As they role play, they will use this beginning language to build their "own" responses. Later, you will find them still using these "tried and true" even though they have been with you awhile. In order to be effective, there are a couple of things you need to do.

First, get them to an area that is out of the mainstream of the business and allows you sufficient controlled time in an environment set aside from the daily grind of the regular day.

Second, set aside a specific amount of time to role play. Tell everyone how long you'll be role playing and what you want to accomplish in this time frame. This includes support staff that is not involved, as they most likely will be responsible for un-interrupted training.

Next, during this process be aware that the "players" will feel the same emotions as if "live" and in some cases, have "fallout" if they feel like their session did not go well. They will lose focus and begin to feel "burned out" if continued for too long.

Also remember successful Role Play is done over several time periods to allow assimilation, practice and live interaction. Plan for some down time between sessions.

Finally, have an after action review. This helps the participants decompress and begin to understand what they have learned. (see "*Scripting*" at the end of this chapter)

4. **Mentoring and Coaching.** By far, the most rewarding and maddening at the same time. Coaching someone is the ability to see in them something they have missed themselves and bringing that to the surface so that they may learn and grow from it. It can be maddening if the person you are working with does not respond or if you have poor coaching skills, questioning techniques, negotiating skills or just don't care about the person and are interested only in results. It is one of the few human interactions that when done masterfully, adds not only to the person being coached and mentored, but to the person doing the coaching and mentoring.

It requires growth in both parties to be considered successful.

First, identify people who can most benefit from coaching. This can be difficult. It is somewhat arbitrary. It can be results driven. Working with people that can benefit the most is the best way to demonstrate your commitment to them.

Second, have a system to measure them by. It can be performance based, and have elements of longevity or other attributes that you consider important to the organization. You might consider evaluating the people you lead by identifying the top skills they possess, their primary responsibility to you and the organization and what you believe they need help with.

Use a scale, say 1-10. Write down the top 10 characteristics you believe are most important to you and the organization. Some of these are as follows.

- | | |
|-----------------------|--|
| Organizational skills | Do they have an understanding of how the organization runs? |
| Leadership | Do they step in when needed, or stand around? |
| Integrity | Do they take a stand? |
| Honesty | Do they admit mistakes? Take responsibility? |
| Attitude | Do they have an Attitude that you want others to have? |
| Initiative | Do they take action when needed? |
| Helpfulness | Are they helpful with employees and Customers alike? |
| Cheerfulness | Do you want to be around them? |
| Friendliness | Do they extend the hand of friendliness to people they meet? |
| Self Development | Are they learning on their own? |

Enthusiasm Do they infect everyone around them with positive thoughts and actions?

This is by no means the end all to questions or characteristics. The best thing about this is, you decide what you want to measure.

Next, you can begin the initial interview process. This is where active listening and effective questioning skills come into play. Begin by asking questions that guide. Use lots of open ended rather than close ended questions. This will go a long ways to draw out the specific needs of the employee.

Now you will want to identify areas that the employee can excel in. Get the buy in here and the employee will begin to work towards agreed upon goals right away. Don't get buy in here, and coaching or mentoring sessions will begin to seem "useless" by you.

Finally, schedule a follow up session. This is critical. If you are not following up, you are not doing it properly. The person you are coaching will need the follow up to keep them on track and at the same time, let you know what adjustments need to be made.

It is through follow up that you get follow through.

5. Professional Training. Professional training is probably the one area we all need from time to time, whether you are a seasoned pro or a "noobee." There are many sources these days to choose from.

You can start with recommendations from people in your field who have attended a seminar, college course or other training. Call the provider and find out the course content and determine if this will meet your needs. Then schedule and Take Action!

Other ways include doing on line searches for schools, academies and seminars local to you that have the content you desire. Once you have found them, call or send an email and request more information. Ask to view a video or promotional cd. Many training organizations have information they will send you if you ask.

Don't forget about professional training within your organization. Many of your personnel have the skills and knowledge, and some would like to run a class for your staff if you ask. Contact HR and ask if there is someone who can lead seminars or 2-3 hours of training in your organization. After they attend, have them report back to you the Top 5 New Ideas they have and how will they implement them into their daily routine.

A special note about Scripting. Scripting events and outcomes teaches us the correct response without having to learn the hard way. When we script, we are really defining the result we would like to have and then reinforcing that outcome. It is surprisingly simple to do. It is easiest if you have the Top 5 Most Common Scenarios that people in your organization face ready for them to script. It can be as simple as "write out the proper

greeting and response for a person who responds to questions with one word responses.” Once thy have “scripted” a response, you can fine tune it with the organizational script or planned response. This type of “action thinking” gets the right results. It’s when the person does not practice in advance and gets “out of position” that bad experiences happen.

Chapter 3

How Do I Keep Them Focused?

After all of this training and mentoring and follow up, we find that the person we have invested so heavily into seems to be losing his or her way. They are not completing tasks and seem “lost.” It’s time to take ACTION to save the employee and bring them back from the abyss, or edge, or whatever.

1. **Feedback.** Proper feedback delivered properly. It sounds easy, and most of the time, we take it for granted. We all believe that we deliver an impact filled message that is understood and implemented. In reality, most feedback is barely functionary and many times useless to the person receiving it. Include these Top 5 Feedback Steps the next time you give feedback.
 - A. Be very specific. Describe exactly what you see. Describe specific behaviors. And ask them what they see and feel. Use assertive language and powerful image statements.
 - B. Use “I” Language to describe what you are observing. “I’ve noticed, observed, felt or found” is a great way to keep defenses down and doors to communication open.
 - C. Ask for their input and observations, and be ready to take the steps THEY recommend if those steps are applicable.
 - D. Include a “scale” that is easily understood for both parties and is relative. For example, you might say “On a scale of 1-10 how likely are you to finish this project by the assigned delivery date?” rather than “Think you can finish this by next Thursday?”
 - E. Do it at the right time and place. If you need to discuss something in private, move to a private location. If you are in the middle of the Customer Reception area and everyone is milling about, it probably would not be the right time to discuss that person’s recent performance during a particular Customer’s meltdown. Finding the right time and place becomes second nature and is intuitive.

Effective Feedback, properly delivered, in a timely manner, with specific objectives is the most effective tool a manager has in changing behaviors and attitudes.

2. **Daily Observation and Work Share.** This is when you spend time with them while they complete their daily tasks. It’s time spent as not only relationship building, it’s time spent as a Coach/Mentor/Teammate.

The thought is this. If you are a Captain navigating a ship across the ocean, you wouldn’t give a set of instructions based on the conditions you were in presently, and then expect the crew to navigate safely to the next port without checking and making course corrections as conditions change. As the ships Captain, you would make those changes as needed to get you where you wanted to go. This

is no different. You are accomplishing the same thing. In fact, you are the “Captain.” They are counting on you to make changes and bring them all safely to “port.”

This is or can be as simple as “hanging out” at work with them and performing daily tasks, taking notes, asking them to take some notes and comparing them at the end of the day. When the day is complete, start off by asking them what they think they did well. Then ask them what they believe are “changes you would like to make”. Now you can introduce your observations and get their buy in. Don’t forget to schedule a follow up! *(If you have never done this, you will need to lay some groundwork first. Just showing up and telling someone that you are working with them may cause some anxiety on their part.)*

3. **Ask Them to Train Others.** It’s a fantastic way to get your staff involved and at the same time train your replacement. If you have not begun the process of training your replacement, how can you be promoted? Move up? Move on?

Everyone wants to feel that they are part of a bigger picture. They also want to feel good about contributing to the company’s future, if presented properly. Merely telling someone that they “will be training Nick The New Guy” without buy in on their end is asking for trouble and a poorly trained NTNG.

First, identify the top people in your organization; explain to them that you believe they are the top talent and that you would like to see their skills and knowledge passed on.

Second, lay out some specific objectives that the training will accomplish.

Next, during initial training, be available to step in (if needed) and make recommendations or changes.

Also, follow up to make sure that the training they are giving is what you expect and need.

And finally, Celebrate and Compliment. Tell everyone involved how well they are doing.

4. **Ask Them to Coach/Mentor Others.** Coaching and Mentoring is different than training. A Coach is someone that looks at others and identifies areas of strengths and weaknesses and then helps that person grow the strengths while shrinking the weaknesses. It is not the same as training someone.

Training is teaching the other person a task or duty.

Coaching or Mentoring is growing the other person.

It requires a different set of skill sets and it is a skill that can be learned. It does require the person conducting the Coaching/Mentoring to have an **INTEREST** in growing other people. Not all personnel want to do this. Identify your top people by asking the following 5 questions.

Have they demonstrated any leadership traits such as, taking someone under their wing or spent extra time with someone who was struggling?

Have they been in your organization long enough to understand how it really works?

Have they pursued self development?

Have they identified themselves as someone who is looking to grow in your organization?

And finally, do you want to spend time with them and do others want to spend time with them? (Ask yourself this way, if there were three people stranded on an island, and all were starving, who would you bonk on the head and eat first?)

Once you have identified those willing to help others grow, you'll want to verify that their listening and solution skills are up to speed. Have them practice on you by coaching you to be a better manager and supervisor. (How about that!)

5. **Recognition!** Without a doubt, the most overlooked tools in a manager's toolbox. Great Organizations have Great Celebrations! Underperforming Organizations have zero or infrequent Celebrations and are so poor at doing it, that the people working in these Companies frequently have little or no idea why they are Celebrating or receiving Recognition.

Ever been to a company function, with banners and announcements and have someone *in your company* ask "What's going on?" or "What happened?" This is a clear signal that regular and appropriate recognition is not taking place. (And that your company has poor communications)

What is appropriate you ask? Start the process by completing a survey. Ask your staff. You can start small. Realize most people appreciate *anything* as long as it is sincere. You can start by doing small "peer to peer recognition" programs. After they have been in place, ask your staff what else they would like. They will tell you. Please note, it is not always bonuses and time off. Be creative. And Sincere!

Chapter 4

How Do I Reinforce Training?

Your personnel are trained. Perfect! And they will stay that way! Right! (Let me know how that turns out.) Training was the first step. Now you need to keep reinforcing the training. Here are the Top 5 Ways to Reinforce Training.

1. **Have 30/60/90 Day Practice and Learning Sessions.** These are great ways to evaluate progress and make corrections. I don't recommend waiting any longer than 90 days. We have a hard enough time remembering what we ate for lunch yesterday, let alone remembering training or seminars that occurred 3 or 4 months ago.

These sessions are quick hits. They need to be no more than 2-3 hours. Think of these sessions as "vitamins" for training. Skip the commercials and get to the good stuff. Focus on the ***most important*** learning objectives! Reinforce these objectives by role play, workbook review and training material review. (cd, videos or dvd) You can do this over several lunch hours as a "lunch and learn" follow on session. They can be group sessions or one on one. There are 5 items to cover in the follow on sessions.

- A. Are they using the skill sets learned in training? How? What are some of the results they have and can demonstrate? What is the number one success story they have from attending training?
- B. What aspects of the training would they like to see more of? (Can you provide that? What would it require to bring that about?)
- C. Can they demonstrate how they use the training in daily situations? Like role play?
- D. Have they shared their training success with someone else? Did the other person benefit from the new knowledge or skill set? How? What specifically do they use?
- E. What future training would they like to see? How can that training be integrated into the current curriculum?

2. **30/60/90 Day Review and Goal Setting Session.** These sessions may be a little longer and more "one on one" focused. (You can "combo" this session with a Coaching session, or a Performance Review and save some time) There is less focus on the "training" and more on the "person."

The goal of these sessions to make sure that not only has training been effective; the employee has a clear set of goals to work towards and is in alignment with company mission. Once you have identified the areas that have or have not improved (a fact of life when talking training), then ask about their goals and describe some goals you have for them. Ask them for buy in by describing how

you are going to help them achieve their goals. Be very specific. If you can integrate those with stated company goals you have alignment and win/win. (See #5 for specific ways to do this.)

3. **Have a Refresher Day.** This is one complete day normally scheduled at the 30 day mark where you and the employees go over recent training material and information, talk about best practices and then for one whole day, everyone concentrates on implementing all of those best practices with peer to peer reinforcement and day end evaluation. (you don't have to wait until the 30 day mark, you can do it sooner)

Peer to peer can be fun and much more effective than manager to employee refresher training. In the morning of "refresher" day, go over the top objectives of recent training. Then lay out some specific behaviors that would reflect integration and practice of these behaviors. Have a peer to peer award system, like a gold star, or kudos bars or a #1 sticker, (every time a peer notices a behavior, they award a sticker).

The goal is to get the most awards (reinforce the behavior). Make it an extremely focused day. At the end of the day, have a wrap up, give prizes for the most behaviors awarded. Use this time to go over key training objectives. Then have them identify the top 3 skills they now practice as a result of training.

It is important that only the most recent training be discussed. Concentrate on making the previous training stick before introducing new ideas. This of course, is relevant to the employee's level of absorption, implementation and application of previous training sessions.

4. **Videotaping/Recording.** This is one technique many companies use and is the reason you hear "This call maybe monitored for training purposes" when you call into some organizations. It is extremely effective in identifying areas you would like to correct and areas you want to reinforce.

Let's look at both of them. Videotaping has the advantage of visual reinforcement. It allows both you and the person you are training to see subtle differences between actual behavior and desired behavior. It does require more planning and positioning and in some cases, releases for use.

Voice recording on the other hand, is a common practice and generally accepted form of training and reinforcement. It is easily adapted to various situations. It can be a valuable tool in scripting and changing representative's delivery, tone and responses.

5. **Goal Setting and Vision Building.** This is helping them see how training can give them solid ground for a career. Training also can help them achieve their personal goals. This can be considered a coaching session and one that is designed to have them tell you what they would like to accomplish.

The Top 5 Areas of Goals and Goal Setting are;

A. Professional Goals. Ask them what they want to accomplish in their career. Most people will say they believe themselves to be professional in their approach to their work. What is also true is that most people do not extend the same thought to training. Many feel that if they have been doing something for awhile, they know their job better than anyone. Here is where you can show them that training allows them to reach their goals sooner. Show them how training will enhance their career and open new doors. Then link training to their Professional Goals by meshing the two together with a plan. Lay out a training schedule with timelines and checkpoints. Then ask for their buy in.

B. Personal Goals. Ask them about what they want to see and do in their lives. Many people have not really taken the time to breathe life into their personal goals by writing them down. Some people have an idea of some things they would like to do. Ever met someone that had a “100 things I’d like to do before I die” list? Get them to focus by having them write down the “Top 5 most important things I want to do in the next 5 years.” Then walk them through an effective training program and show them how it will help them achieve it.

C. Family or Community Goals. Ask them to describe how they want their family to live in the next 5 years. Ask them to describe the type of clothes they are going to wear and the type of car they will be driving. Ask them about their community. How do they see themselves in their Church? Community Groups? What would they like to see where they live? By describing specific goals, you can begin the process of linking and meshing training together with goals.

D. Monetary Goals. Ask them what do they think they would like to make? Most everyone will say a “lot of money.” A “lot of money” for two people is very different from one to another. Ask them to define specifically what a “lot of money” is to them. Get them to commit to a dollar figure. Show them how training can help them accomplish those monetary goals.

E. Long Term Goals. This is where you and your employee can play the “what if” game and have a lot of fun. Ask them to describe how they see themselves in 20 years. What type of house do they live in? What are their activities? This one question will get a very interesting response sometimes. They really have to picture themselves 20 years in the future in order to formulate and plan for the arrival of that future.

There is no more important step in forming a bond between you and those you lead, than by taking the time to help them visualize and affirm their future.

Chapter 5

What New Skills Should I Teach Them?

“Hey, new skills...sorry, I don’t think so. You’ve already got us into all these other skills and it’s going to take me awhile to get these done.” It’s not easy getting to the top, but it’s a lot harder to stay there. If you are not constantly stretching their minds and skills, they will stop growing. And we all know what that looks like...that’s right...pond scum. Here are 5 New Skills

1. **Interviewing Skills.** Ever watch a talk show and wonder how they get people to “open up” about subjects they never would have discussed in public before? It’s the right question, framed the right way and delivered with perfect timing. This is partly effective questioning and intuitive timing. The first is technique and can be taught. The second is internal to the person doing the questioning. It is the result of trial and error.

In effective “interviewing” your goal is to learn more about the Customer without them feeling like you are pressuring them or harassing them. It is a series of open ended questions that guide without guiding. They are delivered in an open friendly manner and reflect a genuine interest in your Customer. If knowledge is power, then applied knowledge is transformational power. You can positively transform your previous relationship into real long term relationships that continue past the work environment in some cases. It these “personal skills” that every one of us needs to develop and practice.

2. **Building Long Term Loyalty.** It is this skill that is instrumental in your organizations long term success. Long Term Loyalty is where the company lives and dies. Get everyone focused on building it, and the company thrives. They begin to take action on the Customers behalf for the Customer. They see value in bringing the Customer back for repeat visits and purchase opportunities. And they are enthusiastic in their work and their approach.

Building disloyalty is just the opposite. It is a “they’ll come back because I’m the only one” mentality. Best practices are “thought of” and not implemented. Every day is a day of uncertainty for the Customer and a day of apathy for the employee. Need a taste of that...visit a fast food joint, box store checkout or conglomerant return booth. Got the picture? Great, because it always comes down to the people providing the service.

People who are committed to Long Term Loyalty always remember that the Customer is the reason they are there, believe that during the time they are at their job they should provide the best service possible and that no matter what, the person they are talking to is someone’s Dad, Mom, Grandma, Grandpa, Brother, Sister or a person who deserves respect and the best service that they can provide. In addition, it’s about the question they ask

themselves. "If I were my Customer, would I come back and use my service and would I recommend my service?"

3. **Interacting with Confidence and Efficiency.** This might sound easy. In reality, it isn't. How many times have you been somewhere and asked a question of a Customer Service Provider and received this reply "I'm not sure" or "I don't know if we do that" or "I don't know if we can do that." These statements do little to encourage the Customer to do business or continue to do business.

As Managers and Supervisors we have an obligation to give every resource available to our Reps and encourage them to use them! Here are 5 ways you can do this and get them to high level performance.

First, have them write out their top 5 operating procedures describing what they believe they can do to help any Customer in any situation and then show them your top 5. Chances are those two lists do not match.

Second, when they come to you for a "what can we do" question, ask them for their solution first. Getting them to believe in their own "powers of assistance" is more than half the battle. Then let them know that they now have the "power of action" to continue to help Customers without your intervention.

Next, have them tell you their level of authority and let them know what it really is. They think they "can't." Help them see they can.

Also, intervene only when absolutely necessary. When it's a matter of saving a valued Customer or saving a valued Employee. Have an "after action" meeting to decide what went well and what you would like to change. Then change it.

And finally, let them fail. It's hard. If you let them fail forward you can **move forward!** It's when we jump in and do something to "help them" that they lose trust and faith in us and we demonstrate a lack of trust and faith in them.

4. **Teach Them to Continue the Conversation.** Have you ever spent time talking with someone and just wish it would never end? And when you finally separated and went your own ways, you found yourself thinking about the conversation and wished you could continue it? That's exactly how we want our Customers to feel. The thought we want them to have is one of expectation. Expecting that the service they receive, the interaction they have and the feeling they leave with is exactly one that they wish they could

continue. It's not satisfaction. It's anticipation, expectation and perception all rolled into one big ball of continuation. It is a feeling of "I may not always be happy with the answer, but I am always happy with the service."

People expect that things may not go their way from time to time. That's life. What they want is a person who tells them honestly and does it in a way that respects them and gives them options. Then the next time they see you they are eager to listen to you and consider your opinion as a friend would.

5. **Plan for the Future!** We cannot stand around and wait for change. It will come to us whether we want it or not, and what could be better than to anticipate it and get ready for it. Or consider the other option, wait and cry about it. Here is a new view you might look at.

Everyday you have an opportunity to launch your own new 1 day, 1 week, 1 month, 1 year, 5 year plan. Everyday.

If you view this as the opportunity to effect change rather than be affected by change, then you can see the Future coming to you as planned. If you are standing and looking backwards at past events as if they are still present events, (and you can influence them somehow), then you are really missing the chance to make the Future as you see fit.

Your Customers are constantly changing. Treating them as if they were the same 20 or 30 years ago is just plain wrong.

*Though the human evolutionary process has stopped in terms of radical changes, the **Customer** evolutionary process has never stopped.*

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