Setting goals for yourself

We may be a month into the New Year, but it’s still not too late to set some goals for yourself. But what’s the difference between setting good goals and bad goals for yourself — or for your team? According to Bob Nelson, author of 1001 Ways to Take Initiative at Work, the best goals are:

• Few in number and specific in focus.
• Not too hard, and not too easy.
• Mutually agreed to with any others who might have to contribute toward achieving the goal.
• Visualized and written down.

When it comes to deciding exactly what goals to focus on, Nelson says, ask yourself the following questions:

• What actions give you the greatest impact?
• What one thing will you do differently? And how will you keep your commitment to doing that one thing?

“Unplug” to gain more control over workplace stress

Working in customer service doesn’t leave much time for leisurely reflection on one’s work or quiet preparation or follow-up to deal with customer issues. It’s usually one call after another with the customer service rep not knowing whether the caller at the other end of the line is going to be friendly and cooperative or downright mean and abusive.

“Working in customer service is one of the most emotionally demanding jobs there is,” says Barbara Burke, a call center trainer and consultant, and author of The Napkin, the Melon & the Monkey: How to Be Happy and Successful in Your Work and Life by Simply Changing Your Mind.

And while customer service reps can’t do much to alter or control what’s coming at them over the phones or across the desk, they can manage and control how they react to these things. And the first step to learning how to exercise that control is to learn how to “unplug.”

Teach yourself to unplug

Burke’s book tells the fictional tale of a customer service rep coming to terms with the difficulties of her job. “And since the story takes place in a customer service call center, I use the term ‘unplugging’ as a metaphor for unplugging the headset that the service rep uses on the job,” Burke says. “When she unplugs her headset, all the noise and chatter stops, and only then does she get some peace and quiet. The same thing happens when she ‘unplugs’ her mind for a few minutes each day.”

The essential form of unplugging for Burke is to “sit up straight in a relaxed manner, remain motionless, and focus on your breath. Don’t try to push your thoughts away but learn to observe them without making judgments and without following them. Just return to concentrating on your breath. When you focus on your breath, that brings you back to your center. What we are doing when we unplug is really disciplining our minds so that we are able to be less reactive and more in control.”

But there are a lot of different ways to unplug, Burke says. “Everybody has their own personal way of doing it. Some people need to escape to a quiet place — find an unoccupied office or an unused meeting room. Others might go for a short walk. If you have a really calming screen saver you can just view that and try to concentrate on your breath. You can even do it...
between phone calls.”

Taking time to unplug offers a lot of benefits. “Over the course of the day for most reps, the stress level just ratchets up and pretty soon you are not very skillful in how you deal with customers because you don’t have that reservoir of emotional control that you need to be able to handle difficult customers — or just the everyday challenges of the job,” Burke says. “We find that if you can get away from the chaos in the call center to go somewhere to just clear your mind, you are much more productive when you get back.”

Be open to “Aha” moments

Unplugging — and the self observation and mindfulness that it encourages — will also help reps to be more open to those moments of understanding and discovery that Burke calls “Aha” moments — little pieces of wisdom that we pick up that make dealing with customers just a little bit easier.

For example, one of the “ahas” that Burke’s fictional customer service rep experiences is: There’s no such thing as a difficult situation. “And by this we mean that we have very little control over what happens to us — from service disasters to difficult customers. But we do have the power to control one thing — which is our reaction to those events and people. A difficult situation is just that — a situation — and it’s up to the rep to decide if it is going to be ‘good,’ ‘bad,’ ‘difficult,’ or ‘easy.’”

Another related “aha” that Burke describes is one that most reps learn at one point or another, and that is: It’s not about me. “When customers are angry, they are frustrated with the situation, and not with the rep,” she says. “And when the rep puts his or her energy into solving the customer’s problem instead of getting angry back, everyone is happier.”

When all else fails, have a SODA

One of the most challenging and stressful situations that reps encounter on a regular basis is dealing with a difficult or irate customer — and Burke offers an “Aha” for that, as well. It’s a four step process for handling emotionally charged situations that she calls SODA:

Stop what you are doing. 
Observe what is going on. 
Decide on a solution. 
Act with confidence.

“When we are forced to deal with a difficult, irate person at work, our natural response is to become defensive. But that reaction isn’t appropriate in most business situations,” she says.

“When I work with reps I ask them to just stop for a nanosecond before reacting automatically. It’s that automatic reaction that often gets us into trouble, and by practicing unplugging, we discipline our minds to react less automatically,” Burke says. “If you can stop for a second to observe the situation for what it really is — maybe a shipment was incomplete or went astray — and begin to understand that, ‘OK, the facts of the situation are that maybe we screwed up, and if I were this customer, I would probably be mad too.’”

The other self-talk that should go on during that short stop-and-observe moment is to realize that it is not about you — the rep — the customer is angry about the situation. “And once you take yourself out of the equation, you can focus on coming up with a solution to the customer’s problem,” says Burke. “And I always counsel reps to try to come up with at least two options for the customer so they have some say in the decision — and then you can act with confidence once you have formulated what your solution will be.”

Five more service “Ahas”

The main character in Barbara Burke’s book, The Napkin, the Melon & the Monkey, is a customer service rep who has a number of “Aha” moments that make her life as a service rep easier. Following are her character’s observations on their meaning:

Problems can be gifts in disguise. “At first I thought the notion that problems could be gifts in disguise was nuts. But once I started getting a better handle on problem situations by practicing SODA, I could see that every call from a customer was an opportunity to practice understanding and compassion.”

The nicer I am to myself, the nicer I am to others. “Once I let go of the notion that I needed to be perfect, and so did everyone else, I became much more patient with myself and others.”

A simple apology works wonders. “I never considered it my responsibility to apologize to a customer for the inconvenience a problem had caused. But when I tried it, I was amazed at how those two words — ‘I apologize’ — immediately diffused customers’ anger.”

Give a little, get a lot. “Once I made a conscious effort to be more generous and understanding of others, good things happened. It was as if I was being rewarded for doing the right thing.”

United we stand. Divided we fall. “Once team members realize that the only way they are going to achieve their goals is if they put their differences aside, everything changes.”
Be “curious” to better connect

Most customers — even angry ones — will listen to what you have to say if you will first respectfully listen to what they have to say. According to Mari-beth Kuzmeski, author of The Connectors: How the World’s Most Successful Businesspeople Build Relationships and Win Clients for Life, “Knowing that you are truly listening can cause your customers to agree to your suggestions much more quickly.”

Most people — reps included — partially listen, get ready to respond, and then let their minds drift. “But if you take the time to practice ‘curious listening,’” Kuzmeski says, “you will differentiate yourself as someone who really cares.”

Here are the four steps of curious listening:
• Hear the essence of what your customer is saying by repeating back what you heard.
• Ask questions so that your customer knows you are actively seeking to understand why something is important to him.
• Make sure that you aren’t acting on unsubstantiated assumptions. Confirm with the customer that you have correctly understood what he is saying.
• Listen for the “remarkable.” In almost every conversation you have with a customer, there’s a chance he will say something unique and remarkable about himself. Listen for this “remarkable” item — it may be something about an upcoming vacation, a sports enthusiasm, or a business success.

You will be able to come back to that later in the conversation — or in a subsequent conversation, if you have an ongoing relationship with the customer — and connect with the customer on a different level.

Jessica Lohse
Premier CSR
Mercola.com

Jessica Lohse is relatively matter-of-fact but shows a distinct focus on the customer when she describes her work as a Premier CSR for Mercola.com, an online health and wellness company. “To be a premier customer service rep, you would answer both the standard customer service calls, and the calls from our premier customers — those who have ordered in large quantities or who have been with us for an extended period of time,” she says. “They get a little higher level of service.”

Amber Carsen, customer service manager for Mercola, puts the title in a slightly different perspective, however. “In order to be a premier rep you have to meet certain criteria. At least 85 percent of your customer satisfaction ratings, based on surveys sent to customers, have to be nines or 10s — that’s on a scale of zero through 10 — and when Jessica was promoted she was at 92 percent, and that was after only four or five months on the job. She is an awesome seller, and an exceptional customer service person,” Carsen says. “And she is always getting positive comments from customers.”

She shares one of those customer comments: “Jessica was pleasant and personable throughout the order process — not just a rote order-taker. She also anticipated my possible future need for an invoice copy in regard to damaged cookware and emailed that to me even before I thought to ask for it!”

Lohse says that she always tries to anticipate customers’ needs “because I know that they will have to call back if I don’t do it on that first call, especially for calls involving damaged or defective items, or our international customers where customs might be involved. I try to take care of everything that they will need for customs so they don’t have to keep calling back.”

As for being pleasant and personable, “It’s just my nature,” she says. “Probably my biggest and most predominant strength would be my personality. I’m very patient by nature, and I guess I would call myself nice. The people who send me good ratings probably do it because I actually listen to their problem and try to solve it — or to offer them some kind of a solution.”

Carsen agrees with Lohse’s self-assessment: “She has a great personality. And she is very well organized.”

Being organized is important, Lohse says, “because people often call in and want to compare our products to others on the market. On top of that, each of us has a lot of things we have to follow up with customers on.”

There is the occasional problem customer. “But when there is a challenging customer — if they are rude or upset about something — I remember that it’s not my fault, and I just try to empathize with their feelings,” she says. “And I think it is very important to try to help these customers, too, because if you haven’t helped them, or you’ve aggravated them more, they will call back to deal with one of your coworkers.”
Keep these ideas in mind to avoid burnout

What do you do to minimize stress and avoid burnout in what is essentially a very high-stress job? Here are a few ideas:

Take a few minutes at the beginning of your day to plan things out — especially if you anticipate a stressful day. Prioritize your day and make a to-do list — and make sure you have enough time to accomplish the top items.

Listen to some soothing music. Take a few minutes on your break to pull out your iPod or MP3 player to listen to some of your favorite relaxation music.

Pay attention to what you eat. What you eat affects your energy level. Find out which foods make you sluggish and which ones energize you.

Sharing a customer’s grief

Because you work in customer service, you will occasionally encounter customers who are ill or who have received bad news concerning themselves or others. It’s never easy to know what to say or do in these situations. Here are some ideas from the Customer Service Group’s Communicating with Patients: Improving Satisfaction and Outcomes that you can consider and perhaps incorporate into your own intuitive manner of communicating with customers.

Oftentimes, more is less. A few simple words can be more powerful than a long, drawn out expression of sympathy. “I’m so sorry you’re going through this” is enough to let a customer know that you care.

If you are working with the customer in person, connect with eye contact. Looking someone directly in the eye for just a moment as you say a few words conveys sincerity and connects you — one human being to another.

More on active listening

Using effective listening skills is an important tool for building loyal relationships with customers. How good are yours?

Yes No

☐ ☐ Do you give full attention to customers?
☐ ☐ Are you truly listening, or thinking about what you will say next?
☐ ☐ Do you make silent assumptions about what the customer needs?
☐ ☐ Do you ask probing questions to get at customer needs?
☐ ☐ Do you pay attention to underlying emotions?
☐ ☐ Are you listening for the customer’s reactions?
☐ ☐ Are you aware of the customer as a person?

If you answered ‘No’ to any of the questions above, you’ve just created your own customized study guide for improving listening skills. Focus on one of these skills each week until you can answer ‘Yes’ to all seven questions.

Tips for successful follow-up

Not every customer issue can be resolved on the first call, as hard as we might try. Here are some tips for successful execution when you have to follow up:

Be prompt. If you set a specific time to call the customer back, stick to it. Or if the customer wasn’t able to reach you on a call, return that call as quickly as possible. A speedy response always impresses customers.

While it’s impressive to be quick, don’t make a follow-up call until you have the required or necessary information. In other words, don’t drag out the resolution to three calls when it could be handled in two.

If you have to leave a message, provide as much information as you can, and if you are calling for more information, be specific about what details the customer needs to gather before getting back to you.

“The mind is a dangerous weapon, even to the possessor, if he knows not discreetly how to use it.”

— Michel de Montaigne, French Essayist