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Tools, tips and tactics for the frontline customer service professional

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The Takeaway

Learning from elite athletes

At first glance, customer service reps and Olympic athletes don't have much in common. But Steve Siebold, author of *177 Mental Toughness Secrets of the World Class*, says there are several lessons that reps can learn from Olympians.

- Olympians never run from an obstacle. They push forward and learn all they can from the challenges they face.
- Olympians hold themselves accountable for what they want to accomplish.
- Olympians are learning machines. They spend hours practicing, studying their competitors, watching videos of their performances, and meeting regularly with their coaches and mentors.
- Olympians are coachable. Some people are resistant to coaching. But really top performers are always looking for good coaches.
- Olympians learn to compartmentalize their emotions. They focus only on the task in front of them. **TCC**

8 Essential Skills for Customer Service

Where customer service is concerned, "nice" isn't enough.

Take a nice, polite person with a pleasant phone voice and what do you have? A nice, polite person with a pleasant phone voice. But not necessarily a great customer service professional.

One of Editor Bill Keenan's pet peeves is the assumption that nice people automatically provide excellent customer service. "It always helps to be nice," he says, "but customer service is more than an attitude, it's a complex set of skills ranging from the technical to the emotional and everything in between."

To put it another way, it's what are commonly referred to as hard skills and soft skills. Hard skills are job-related and can be taught. Soft skills are personal qualities and traits. These are more difficult to quantify and teach but are essential for creating positive customer interactions.

From over a dozen years editing *Customer Communicator*, Keenan has identified eight essential skills for frontline reps because nice is good, but it isn't enough. The eight essentials are:

- **Communication skills.** Effective communication is at the heart of customer service. Frontline reps must be able to articulate information clearly and concisely, both through the spoken word and in writing. This skill becomes even more critical when dealing with complex issues or explaining technical material to non-technical customers. Active listening is equally important, says Keenan, "because it allows representatives to fully understand customer concerns, anticipate needs, and respond appropriately."
- **Product knowledge.** Customers rely on reps to provide accurate information and solutions to their problems. One of the most crucial skills for frontline reps is a deep understanding of their organization's products and services. To be effective, reps must be constantly questioning and learning so that they can answer questions confidently and offer appropriate solutions.
- **Problem-solving abilities.** Customer service often involves addressing complaints, resolving issues, and finding solutions to unexpected

Teamwork and collaboration pop quiz

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problems. Strong problem-solving skills are essential for navigating these challenges effectively. Frontline reps must be able to think critically, analyze situations quickly, and develop creative solutions that satisfy both the customer and their organization. “To do this,” Keenan says, “reps must be able to think on their feet and make decisions under pressure.”

• **Emotional intelligence and patience.** This includes the ability to empathize with customers, manage one’s own emotions, and de-escalate tense situations. Patience allows reps to listen carefully to customers’ concerns, avoid making rash decisions, and provide thoughtful responses. Patience is, of course, particularly important when dealing with frustrated or angry customers.

• **Resilience.** Resilience is closely related to emotional intelligence and is an essential skill for customer service professionals. Resilience helps reps recover from stressful calls, difficult customers, and high pressure situations. It allows them to bounce back and approach each new customer with a fresh perspective free of any lingering negative feelings.

• **Computer and technical skills.** “Years ago, when I started in customer service, technical skills would not have been on my list,” says Keenan. “But in the digital age, customer service increasingly relies on technology. Frontline reps must be proficient in using computer systems, such as customer relationship management software, database management tools, and communication platforms. As technology continues to evolve, the ability to learn new systems will become increasingly important.”

Pop Quiz

This month, Editor Bill Keenan reminds readers of the importance of teamwork and collaboration. The following 16 questions will help you evaluate your skills as a team member. Answer each statement Yes or No. Turn to page 4 to see your score.

	Yes	No
1. I work well as part of a group.	<input type="checkbox"/>	<input type="checkbox"/>
2. I work well on my own.....	<input type="checkbox"/>	<input type="checkbox"/>
3. I get along with all types of people.	<input type="checkbox"/>	<input type="checkbox"/>
4. I recognize the unique qualities that each of my teammates brings to the group.	<input type="checkbox"/>	<input type="checkbox"/>
5. I am comfortable giving feedback to and receiving feedback from my teammates.	<input type="checkbox"/>	<input type="checkbox"/>
6. I feel safe to express my ideas, even when I don’t agree with others on my team.	<input type="checkbox"/>	<input type="checkbox"/>
7. When there is conflict, I can discuss the problem honestly and openly.	<input type="checkbox"/>	<input type="checkbox"/>
8. I understand my role and contribution to the team.	<input type="checkbox"/>	<input type="checkbox"/>
9. I am open to suggestions from others.	<input type="checkbox"/>	<input type="checkbox"/>
10. I arrive for team meetings on time and prepared.....	<input type="checkbox"/>	<input type="checkbox"/>
11. I am always willing to help a teammate.	<input type="checkbox"/>	<input type="checkbox"/>
12. I openly share information with my teammates.	<input type="checkbox"/>	<input type="checkbox"/>
13. I respect my teammates’ time.....	<input type="checkbox"/>	<input type="checkbox"/>
14. I don’t feel the need to force the team to accept my views.	<input type="checkbox"/>	<input type="checkbox"/>
15. I publicly praise my teammates when I feel they’ve done a good job.	<input type="checkbox"/>	<input type="checkbox"/>
16. I am flexible and can easily take on new or different team tasks or responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>

• **Teamwork and collaboration.** While much of a frontline rep’s work involves interaction with customers, the ability to work well as part of a team is equally important. Customer issues often require collaboration with other departments or escalation to supervisors. Strong teamwork skills enable reps to navigate these relationships smoothly, ensuring that customer’s needs are met.

• **Attention to detail.** While it is last on this list, Keenan says that “accuracy is essential in customer service.” Whether it’s recording customer information, processing orders, or relaying product details, even small errors can lead to significant problems. Reps must have an eagle eye for detail, double-checking work and ensuring that all information is correctly captured and communicated. **TCC**

A monthly roundup . . .

Chatbots get mixed reviews

Customer service chatbots are a reality in many fields. But according to polling firm Civic Science, consumers say they need improvement. Recent data revealed that 45 percent of U.S. adults view using customer service chatbots as “unfavorable.”

Civic Science says that most people want to address customer service complaints or questions with a real person. And as with most things, age makes a difference. Gen Z – those between 18 and 24 – feel more favorable about using chatbots. Those 55 and older feel the least favorable about using customer service chatbots.

[Civicscience.com](https://www.civicscience.com)

Crisis highlights customer service weaknesses

The worldwide technology meltdown triggered by a CrowdStrike error in July brought customer service operations into public view. In particular, Delta Airline’s customer service practices came under attack. Passengers complained on social media that the airline hadn’t offered them refunds, reimbursement for hotel accommodations, or meal vouchers. Some passengers also reported waiting for hours to speak with a customer service agent.

Ask the Experts

What to do when a customer sends you into a tailspin?

I often get flustered when a customer asks a difficult question or pushes for a resolution that I can’t provide. Sometimes they just have to start talking and I know where the call is going, I feel the tension rising, and I know they can hear the anxiety in my voice.

Breathe

“Over time, and with experience, you’ll find that you no longer get flustered by customer calls. My motto is ‘never let them see you sweat,’” shares Ruth Yost a service associate in Idaho.

Yost recommends breathing and pausing to maintain control. “While the customer is explaining the situation or the problem, I’m trying to resist getting stressed or flustered with simple breathing. I use the classic in through the nose, hold, out through the mouth. Then I take a nice pause before responding. This little moment of Zen helps me get past my emotions so that I can help the customer.”

Keep calm

“Customers are like animals, they can sense fear, they can hear it in your voice, and when they do, they will push for what they want,” jokes Jenna Geraghty a frontline rep from New Jersey.

“As far as I’m concerned, the best thing to do is to stay calm. When you remain calm and speak in a controlled, neutral voice, the customer will remain calm as well. That’s easy to say, but harder to do. Even if you’re not calm, try to project calm and confidence. To do this, I’ll slow down just a bit

and lower my voice a little. This really helps me hide my anxiety and keep control of the call,” says Geraghty.

Working in local government, Geraghty assists customers on the phone and in person. “When face to face,” she says, “it’s important to appear confident as well as sound confident. Try to maintain eye contact, keep a relaxed posture, don’t fidget, and use a firm, but friendly tone of voice.”

Break it down

When you get flustered, it’s easy to lose your grip on a call. Danielle Rechterovich, a senior rep from Mississauga, Canada, shares that even after years in service there are calls that can raise her stress level. “Oh my goodness, I just know what’s coming,” she says. In those moments, it’s easy to get overwhelmed and handle a call badly. To prevent this she tries to focus on the issue, not her emotions, and to break the call down into manageable parts. “This helps you avoid feeling overwhelmed and maintain your composure,” she says.



Ask the experts. Have a question or comment you’d like to share? Just email info@CustomerServiceGroup.com. Please use the subject “Ask the Experts.”

Refreshers and quick tips . . .

Good news

France opened its first museum [dedicated to cheese](#).

Students at Tennessee Tech created [3D-printed prosthetic arms](#) for a 12-year-old drummer.

In one city, all of the restaurants are switching to [reusable to-go cups](#) to reduce waste.

Pause more often

A mistake that many reps make is saying more than customers want to hear or can take in, says Stacey Hanke, a communications consultant and co-author of *Yes You Can!*

The solution Hanke says is to, “Slow down your rate of speech and deliberately introduce more pauses into your conversation.” This will allow customers more time to understand your message.

In addition, if your speech is cluttered with verbal filler like um, uh, you know, like, etc. try replacing those verbal tics with a pause.

“Less is more in most cases,” Hanke says.

Avoid sounding like a robot

Robotism is when you take action for a customer without doing anything to build the relationship first, says Deborah J. Schmidt author of *Building Customer Loyalty from the Inside Out*. “Customers hear the rep saying ‘Account number?’, ‘Social Security number?’, ‘Invoice number?’ in a way that leaves them feeling like no more than a number. On the other hand, try saying, ‘Oh, good morning Mrs. Smith! I’d be happy to help you with that. Do you

have your account number handy?’ It takes only a few seconds longer, but it completely changes the dynamics of the situation,” says Schmidt.

Don’t get too personal

Establishing a personal rapport with customers is a good way to build loyal, long-lasting relationships, but there are some areas that can be risky to approach even with good customers. As a general rule, stay away from any topic where people take sides such as:

- **Controversial events, people, or issues.** You never know what side your customer is on or how sensitive they might be.

- **Politics, religion, and sex.** These three topics can immediately trigger a customer’s hot buttons because most people have strong opinions about each of them.

- **Ethnic backgrounds.** Don’t make any assumptions about a person based on how they sound or what you know about their background.

Encourage customers to ask questions

While it’s important for reps to ask questions, it’s also important to give customers the opportunity to ask questions, says Nancy Friedman of Telephone Doctor Customer Service Training.

Just make sure you guide customers to the right questions. “Asking a question like, ‘Is there anything else I can do for you?’ is probably not going to be very helpful,” says Friedman, “That’s a

very passive way to ask the question.” Instead, she says, be a little more proactive. Ask something like, “What did I not cover that you might still have questions about?”

Having a checklist of common customer questions can also help. For example, you might ask: “Do you have any additional questions about billing? Or about returns? Or about the claims process?” Again, the goal is to make sure that you have taken care of all of the customer’s needs.

Pop quiz scoring

If you had 16-13 “yes” responses — Congratulations! You’re an excellent teammate. 12-9 “yes” responses — You’re a good teammate. And with a little improvement, you can truly excel. 8-5 — You may be experiencing some occasional conflicts with your teammates. Below 4 — You should consider a dramatic shift in your mindset.

No matter what your score, look at all of the responses to which you answered “no,” and make a plan to work on each one.

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“Being nice? It’s not enough. Not even close.”

— Matthew Fray, Relationship coach



SkillSharpeners

The manager's companion to *Customer Communicator*

September 2024

September's highlights

In this month's issue of *Customer Communicator* your team will find:

1. Insights into the skills needed for excellent customer service. Bill Keenan shares a list based on his many years editing *Customer Communicator*.
2. Tips on how to avoid panicking on a call.
3. Customer service news, the role of the pause, pop quiz, good news, and more.

Manager's notes

This month's format is a bit unusual because we present an interview with Editor Bill Keenan. He shares eight essential skills for excellent customer service. Number seven is teamwork and collaboration, which is also the focus of an expanded pop quiz.

In addition to the pop quiz, he recommends a group discussion about communication for improved teamwork and collaboration.

Keenan notes that a lot of customer service training focuses on working with customers over the phone, but often little is said about face to face communication with team members. To remedy that he suggests a team exercise in which you'll create a list of 10 tips for better team communication.

To start, simply ask reps to complete the following prompt: The secret to great communication with team members is _____.

Once you've narrowed your list to 10 items, ask team members to take a moment to privately assess their own skills and set goals for improvement.

Below are some sample responses to get the conversation started:

- Facing your teammate and giving them your undivided attention.
- Listening with an open mind. Trying not to think about how you will respond while they are speaking.
- Not interrupting. Letting your teammate completely finish their thoughts before you respond.
- Demonstrating your attention and interest by leaning slightly forward, maintaining eye contact, nodding or periodically saying "yes" or "uh-huh."
- Summarizing your understanding by saying something like, "So what I understand you're saying is... Is that right?"