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Tools, tips and tactics for the frontline customer service professional

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The Takeaway

Pay it forward

The idea of “paying it forward” can go a long way toward making any workplace more positive and collaborative. It isn’t just about being nice; it’s about simple expressions of thanks and gratitude where one kind gesture inspires others.

The One Kind Act a Day initiative suggests four ways to get started:

- **Compliment a coworker.**

Take a moment to recognize someone’s hard work. Whether it’s during a team meeting or in a one-on-one chat, a heartfelt compliment can go a long way.

- **Lend a hand.** Notice a colleague juggling several responsibilities? Step in and offer a helping hand. It relieves their stress and also shows you value teamwork.

- **Share positive feedback.** If a customer praises your team or a coworker, share it publicly. One person’s success boosts everyone’s morale.

- **Leave an encouraging note.** Write a sticky note with a few uplifting words and leave it on someone’s desk. **TCC**

Great customer service: It’s all in the details

Providing great customer service often hinges on small, frequently overlooked details.

Neglecting those details can lead to missed opportunities, inefficiencies, and dissatisfied customers, while paying attention to the details builds trust, fosters loyalty, and sets your organization apart from competitors.

Here are five “details” that will make a big difference to your customers:

Detail 1. Use the customer’s name. Author Dale Carnegie once said, “A person’s name is to him or her the sweetest and most important sound in any language.”

Call center leader Michael Bowman agrees, “The customer’s name is perhaps the one sure thing that reps have that will grab the customer’s attention, gain their trust, and make them feel good about themselves and you. It is a quick, effective way to make customers feel recognized, and to tell them that the conversation is truly about them and their issues.”

In addition to using the customer’s name, using your own name will help personalize the conversation. Try introducing yourself at the beginning of a call and repeating your name at the end. For example, “Thank you for your call John, if you have any follow-up questions, please call me directly. I’m Michael at extension 456.”

Detail 2. Practice service etiquette. Good etiquette is essential to every customer service interaction. Ed Horrell, author of *The Kindness Revolution*, says that good etiquette is one of the small details that makes a big impression on customers.

He recommends using the phrases “Thank you” and “My pleasure.” This advice comes from the Ritz-Carlton Hotel’s playbook, Horrell says.

Acknowledging the customer by saying “Thank you” shows appreciation, while saying “My pleasure” acknowledges thanks and reinforces a connection. These seemingly small details are fundamental social cues that show gratitude, build rapport, and make interactions smoother and more positive.

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Detail 3. Start off strong. The old saying, “You never get a second chance to make a first impression,” is especially true in customer service. Your first contact with a customer plays a big part in how they view your organization and whether or not they will want to continue to work with you in the future.

“You want to be right there, in the moment, with your customer,” says Jack Perry, a leadership coach and speaker. “Don’t be distracted by something going on in the call center, by an unfinished conversation with another rep, or by any emotional distress left over from your last call. Make the current caller the center of your universe right from the start,” he says.

Detail 4. Ask one more question. If something isn’t quite clear, or if the customer seems to have an unspoken issue or problem, it’s important to ask clarifying questions to get at that issue or to make unspoken expectations more explicit. It’s a little detail that will save time and effort in the long run.

If a customer says, “I need it done quickly,” for example, you need to ask, “How quickly?” in order to understand the customer’s expectation.

“By asking the extra question you get a better feel for what is going on with the customer and a better understanding of how you can meet their needs,” says Shep

Service Note

Feeling tired? Stressed? One of these habits may be to blame

Working while tired can reduce resilience against stress warns author Marcel Daane. “Enthusiasm and motivation plunge, and before we know it, we can no longer perform at our best.” Daane, author of *Headstrong Performance*, points to two common mistakes made by reps struggling to balance busy personal and professional lives.

- You skip daily exercise. After a grueling day, it’s tempting to talk yourself out of the need to exercise. But sedentary behavior doesn’t reward your fatigued brain and body — it makes you more tired. It may sound counter-intuitive, but it’s true: Your brain recovers better and faster when your body moves.
- You skip lunch to take a customer call. “When you skip meals, the regions of your brain responsible for self-regulation, empathy, and solution-based thinking begin to shut down,” Daane says. “Bring your own healthy lunch or snacks, so you have food available no matter how crammed your day becomes.”

Hyken author of *Amaze Every Customer, Every Time*.

Detail 5: Show your appreciation. Using phrases of appreciation in every customer contact is a small detail that gives customers a feeling of importance and demonstrates that they matter to you. So, for example, after taking an order, a phrase of appreciation shows that you value the customer’s business. After resolving a problem, expressing appreciation shows that you value the customer’s patience and understanding. After listening to a customer’s complaint, expressing appreciation shows that

you value the customer’s time and input. Useful phrases of appreciation include:

- Thank you for your order. We appreciate your business.
- Thank you for calling. We appreciate your confidence in us.
- Thank you for sharing your experience. Your insights will allow us correct this error.
- Thank you for joining our practice.
- Thank you for trusting us with your healthcare needs.
- Thank you for holding. **TCC**

Pop Quiz

Test your knowledge of customer service with this month’s pop quiz. Answer each statement true or false. Turn to page 4 to check your answers.

		True	False
1.	In the interest of keeping calls brief, it’s best to skip the little niceties of every-day etiquette.		
2.	Expressing appreciation for a customer’s business sounds phony and should be avoided.		
3.	Customers appreciate it when reps address them by name.		

A monthly roundup . . .

Human connection is more important than speed

Customer expectations are evolving faster than ever and they are redefining what great customer service looks like. A recent report from *Five9* uncovered the preferences of over 1,000 consumers across the U.S., Canada, and the U.K. Despite the rapid pace of change, the value of human interaction remains strong. The survey found:

- Human connection is crucial, with 86 percent of respondents indicating it matters more than a quick response.
- A majority of consumers, 56 percent, still prefer phone support for general issues. This jumps to 74 percent for complex or urgent matters.
- Voice interactions remain the top choice across all regions and generations.

City takes service seriously

The mayor of Little Rock, AK, declared March 11 “311 Day” in the city. The designation is meant to recognize the “exceptional customer service, and the team members who provide an essential link, connecting residents with their city government.”

311 service is the central point of contact for non-emergency calls and requests in the city. More than 120,000 requests for service were made in 2024.

Ask the Experts

What can I do when a customer upsets a coworker?

A coworker received an angry email from a customer. After she read the message she huffed, and grumbled, said that it was the customer’s fault, that he was foolish, etc., etc., etc. I knew she wasn’t prepared to handle the issue, but I wasn’t sure what to do?

Don’t get drawn in

“I love this question because it gives me a chance to talk about the dangers of toxic talk,” says Frances Conroy. “I first read the term in *Customer Communicator* and then realized that toxic talk was creating a toxic environment in my department. Speaking and hearing negative comments about customers or others creates a negative or toxic environment. When you hear this type of talk from a coworker, resist the urge to get caught up in the negative comments or complaints. But, don’t ignore it. Instead, try to shift the conversation as quickly as possible to resolving the problem. You might say, ‘Yes, that’s a shame. But what can we do now to fix things?’”

Regain control

We allow customers time to vent. Sometimes reps forget that they need to find a way to let off steam, too. Service Associate Jamie Gaal says that she is always there when a coworker wants to vent. But she tries to steer things in the right direction, “I won’t let the venting go on too long. Once they’ve gotten their complaint out, I will suggest that they take a moment to relax and regain their composure. If possible, they might take a short walk, practice deep breathing, listen to music, make a fresh cup of tea, whatever it

takes. Once they are feeling more in control, it’s time to reply to the customer, but not before that. If you reply before moving on emotionally, the customer will hear it, or read it, in your tone and the situation could easily escalate,” she says.

Offer practical support

“This has happened to all of us at some point,” says Jakki Hardy. “I feel like this is the time to use some of the skills that I’ve developed working with customers. I try to listen attentively, show empathy, and validate my teammate’s feelings.

“But it’s also important to offer practical support,” says Hardy. “One way to do this is by offering a solution, or a couple of solutions, that might work for the customer. This is a quick way to get back on track with problem solving.”

Another way to offer support is to take over if you can. “In a situation like this one,” says Hardy, “I would definitely show empathy and validation, but I’d also offer to step in and reply to the customer email. If I can do this everyone benefits.



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 . . .

The Golden Rule or the Grandma Rule?

The Golden Rule is the principle of treating others the way you would like to be treated. For years, the Golden Rule has been the guiding principle for customer service professionals.

A variation on the Golden Rule is the Grandma Rule, which says that customers should be treated as you would treat a cherished elder in your own family.

Consultant Jeffrey Gitomer makes a strong case for the Grandma Rule and suggests an easy way to use it to eliminate harsh or negative language from your conversations with customers.

Each time you speak to a customer,” he says, “say the word “grandma” silently to yourself. “If it sounds like something you would say to your grandmother or your grandmother would want to hear, then it’s okay. If not, don’t say it.” Here are some examples:

- Sorry, we’re closed, Grandma
- Next! Grandma
- That’s our policy, Grandma
- You’ll have to fill out this form, Grandma
- I can’t help with that, Grandma.

Take five phrases you use

regularly and try them out with “grandma” at the end.

Using verbal softeners

Every now and then, a customer will make a mistake. While you must correct any serious misinformation, you must do it in a way that does not leave the customer feeling uncomfortable or foolish. To do this, Robert Becal, author of *Customer Service Tools and Techniques*, suggests using what he calls verbal softeners. These are simply soft versions of what may be perceived as harsh words. Using verbal softeners will help you appear more cooperative and will help prevent conflict.

For example, when a customer makes a mistake, you could say “That’s not right. Here’s how it works.” Or you could soften those words and assume some responsibility for the error. In this case you might say. “That’s not quite correct. Perhaps I wasn’t as clear as I could be. Let me clarify.”

Or, if the customer is confused about working with your website you might be tempted to say, “Didn’t you see the big red error message?” But instead you’d say. “That screen can be hard to read. Do you see an error message on the right-hand side of your screen?”

Or, when a customer provides their invoice number instead of

their account number, you might want to say, “That’s your invoice number, I need your account number.” Instead you could say, “Thank you for your invoice number. Now may I have your account number? It starts with the numbers 198.” **TCC**

Pop quiz answers

1. **False.** There’s never a good reason to ignore good manners.
2. **False.** Customers deserve to know that they are appreciated. When you truly value their business, or their input, or even their criticism, it will come through in the sincerity of your words and never sound phony.
3. **True.** Customer’s feel recognized and interactions feel more personal when the customer’s name is used, but not over used.

“... in life it is often the tiny details that end up being the most important.”

— Daniel Handler, American author and musician

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