1. Introduction: Conversational Banking

Activity: Step into the Customer’s shoes

Duration: 40 minutes

**What You’ll Need:** Sheets of paper and pens

With this exercise, break your team up into smaller groups of 3 or 4. Then have each group spend five minutes coming up with a rude, demanding, or vague statement a customer could say based off of their own experiences. Then have someone in the team fold the paper over and hand it to the team to their left.

For the second round, give teams 5-10 minutes to develop both a backstory and response to the fictitious customer.

The idea here is to explain why the customer may have become difficult—for example, maybe the difficult customer had a bad day or a subpar experience.

Have groups share the message, the created backstory, and their appropriate customer service response.

***Debrief:*** *Customers are not usually deliberately rude, demanding or vague. Usually they will have had a bad experience in the past that has caused them to be this way, or they could just be having a bad day. It’s important to remember that when you’re confronted by one of these customers, there will have been a chain of events for each and every one of them which caused them to act the way they are acting. Knowing this will help you remain objective and solution-focused when these customers come to you for help.*

What is conversational banking?

[Conversational banking](https://www.avaloq.com/en/avaloq-engage) means the inclusion of messaging apps – with all their native abilities to communicate in text, voice and rich formats – into a bank’s client experience. Given the intensity of a conversational style service, AI-powered chatbots have to jump in and answer the bulk of repetitive questions. This will free up human agents for non-standard requests. In the case of wealth management, the goal may be to sustain in-person communication. Here, natural language detection offers the potential to support relationship managers in engaging their clients in effective conversations.

Banks start to integrate AI-powered chatbots as well as AI-supported human conversation into their client experience. This trend has clearly been sparked by a shift in the usage of mobile communication from SMS to instant messaging. And while many industries embraced the opportunity of messenger apps from the very beginning, the financial industry had a more conservative take on that matter.

All existing ways to interact with a bank forced clients to use channels which are owned by their bank: branches, contact centers, ATMs, web banking, mobile banking apps. One defining characteristic of a conversational banking solution is to break through these boundaries and include messaging services and voice assistants into the bank’s universe. This involvement entirely changes the style of communication, as clients can use natural language and their preferred channels when speaking to their bank. Or, in other words, requests that used to be a self-service task for the client become part of a natural conversation.

What role do we play?

The whole point of Bella is to remove all communication barriers we usually face with banks, which have a terrible reputation due to the bureaucracy and overall length to perform the tasks we need, by engaging in a quick conversation either with an AI or a representative, clients can quickly fulfill their desires in a language they feel non threatened by and using the same platforms they are used to.

Why Bella Love works

Business struggle to maintain clients when they fail to position their product according to the preferences of their target market. You can hire the most well trained and polite staff to address customers, but if your customer’s wants are not fulfilled, it is unlikely that they will love the brand.

For example, one of the most important reasons why apple has been able to build such a strong base of diehard fans is by positioning its products to cater to their functional and emotional preferences. By understanding the needs and wants of customers to the core, the brand’s appeal increases and the results is customers idolizing it.

Focusing on LOVE

Providing just good customer service is a thing of the past. For a company to be desired and loved by its customers in an increasingly competitive business landscape, it has to show genuine interest in its customers' needs and be persistent in delivering value.

1. Concierges, not agents

Activity:

HEARD Roleplay

**Duration:** 40 minutes

**What You’ll Need:** Prompts

Disney handles over 135 million customers in their parks each year, so customer service isn’t something they take lightly.

The technique Disney has developed to train customer service representatives on how to handle angry customers is called HEARD:

**Hear:** Listen to the customer’s entire story.

**Empathize:** Use phrases that convey that you understand how the customer feels.

**Apologize:** And do so effusively!

**Resolve:** Fix the issue, and if you don’t know how ask the customer, “How can I set this right?”

**Diagnose:** Get to the bottom of the issue so you can make sure it won’t happen again.

Start the following activity with a HEARD lesson. Then, you’ll ask for a set of 2 volunteers, and tell the other participants that they’ll act as judges.

Provide the volunteers with a scenario that you may have seen happen in your company—something either common or comical to keep their interest.

Assign one role-player to be the customer service agent, and the other to be the customer.

Then have them move through each of the five steps, encouraging them with the next step if they seem stuck.

Afterwards, ask your judges to discuss how the customer service agent handled each step, and to come up with their own diagnosis.

***Debrief:*** *when a customer is upset or angry, it may not always be our fault, but it is our problem. Using a technique like this is great as it ensures that you’re handling all customer complaints effectively and in a consistent way. Although following this might feel a bit clumsy and awkward at first, with repeated practice it will become natural for you to respond to complaints in this way. Give it a try and see how it helps you.*

“Build a great experience, customers tell each other about that. Word of mouth is very powerful." -- Jeff Bezos, CEO, Amazon.com

If you attended a party where the host snarled at you, reluctantly offered you a drink, looked past you to greet someone deemed more important and basically couldn't wait until you left -- chances are you would leave, slamming the door behind you.

Unfortunately, that's the experience many of us receive today. We're not treated as a valued customer -- a guest -- to be respected, we're a nuisance to be endured.

1. Let’s not call them clients anymore, or even customers. We should start to refer to them as guests, because they are our guests and we are their host. Meaning we should be always happy to hear from them and we strive to make their time with each of us a great experience.
2. Anticipating needs, A great waiter knows when to refill your glass or bring the check, just as a great company anticipates what their guests need -- often before they know it themselves.
3. Giverespect**.** It costs nothing to be courteous, but you can pay dearly if you aren't.
4. **Treat everyone like a VIP.** “There's only one boss, the customer,” “He can fire everybody from the chairman on down simply by spending his money elsewhere.”
5. **Show immediate action and solutions, not blame.** Sometimes things get messed up, but apologies, which matter, mean nothing if they aren't followed by action. Well done is better than well said.

Why the concierge approach?

Listen being a concierge isn’t something that is done in a transactional type of way. What I mean by this is that a concierge first welcomes you into their (we know its not theirs) home, and caters to your every need, making sure that all issues are fixed should any happen, anticipate client’s needs, and the treatment is warmth like you have a new family member you want to constantly impress they are y our friend and they are here to help you make your services seem exclusive and upgraded.

Now everybody not only knows what a hotel concierge is, but the term has become synonymous with service excellence. Countless people have adopted the word. We have Concierge Towels, Concierge Carpets, and Concierge TVs. There are concierges at apartment buildings and department stores. We have personal concierge services and hospital concierges. A few years ago, acthe cover story of Worth magazine introduced concierge medicine—the latest trend in personalized service in the medical industry. Some people in the hospitality industry become annoyed at this “misuse” of the name, though it’s flattering that the word has become shorthand for over-the-top quality and professionalism. I also find it encouraging that other industries are following suit, though they might not even use the word “concierge.”

Maintaining a positive attitude

Activity

Show and Tell

**Duration:** 40 minutes

**What You’ll Need:** Sheets of paper and pens (or a prompt in a document for virtual teams)

Give each participant a piece of paper and five minutes to recreate a difficult customer service experience they had and to share how they resolved it.

This experience could be due to a number of factors, whether it be a difficult customer, internal error, or multitasking strains.

Encourage participants to think creatively. Then have the group break up into smaller groups of 3 to 5.

Each person should share with their group the situation and how they handled it. Then other members in the group should be encouraged to offer a compliment on what the speaker did well in the situation, as well as offer suggestions for the future.

***Debrief:*** *We’re stronger when we share our experiences with others. It’s important to talk about and learn from situations that are challenging, as much as it’s important to celebrate our successes. Never be afraid to talk about difficult situations – part of what’s great about being part of a team is having the openness and trust to share and learn from each other.*

Attitude is everything, and a positive attitude goes a long way in providing excellent customer service. “The right attitude changes negative customer experiences into positive customer experiences, “Since most customer interactions are not face-to-face, your attitude should be reflected in your language and tone of voice.

It’s easy to misinterpret the tone of written communication, and email or live chat can come across as cold. The brain uses multiple signals to interpret someone else’s emotional tone, including body language and facial expression, many of which are absent online.

Don’t be afraid to use emojis to convey warmth and good humor, or pick up the phone if you find an email or chat conversation getting tense.

Creatively problem-solve

Over 80% of customers have churned because they experienced bad customer service. That’s why you must thrive on solving problems for your customers and make it a central part of your support role – and there will always be problems to solve.

Everyone has heard of the legendary customer service at Zappos. For example, they once sent a best man free shoes the night before the wedding after his order was sent to the wrong location due to a mistake by the delivery company. Zappos solved a problem and exemplified excellent customer service — they won a customer for life and gave the man a story that he couldn’t wait to share.

Don’t be afraid to wow your customers as you seek to problem-solve for them. You could just fix the issue and be on your way, but by creatively meeting their needs in ways that go above and beyond, you’ll create customers that are committed to you and your product.

Respond quickly

66% of people believe that valuing their time is the most important thing in any online customer experience. Resolving customer queries as quickly as possible is a cornerstone of good customer service. Speed should be of the essence — especially for smaller issues that don’t take much time to solve.

That being said — great customer service beats speed every time.

Customers understand that more complex queries take time to resolve. There’s a difference between the time it takes you to respond and the speed at which you resolve their problems. Customers don’t want to languish in a ticket queue, but they’ll spend as much time as it takes to resolve their issue. You should, too.

Get back to your customers as quickly as possible, but don’t be in a rush to get them off the phone or close the ticket without resolving the issue completely.

Personalize your service

40% of customers say they want better human service. That means they want to feel like more than just a ticket number. They get angry when they’re not being treated like an individual person, receiving boilerplate responses, or being batted like a tennis ball to different people.

Customers want to interact with a person — not a company. It’s part of the reason why many businesses send gifts to their customers on their birthdays.

Do you know not only your customers’ names, but also their birthdays? How about their interests or hobbies? Can you make them laugh? It’s obviously not possible to do this for everyone, but going off script and giving the personal touch when you can is an important way to show your customers you know them and you care.

Help customers help themselves

That said, customers don’t always want to talk to someone to get their problem solved — often, they want to quickly resolve their issue themselves. Among consumers, 81% attempt to take care of matters themselves before reaching out to a live representative. Further research shows that 71% want the ability to solve most customer service issues on their own.

Self-service is a scalable, cost-effective way to make customers happy — that’s the thinking that led to Liveperson, which puts help content front and center so customers can find answers right where they are without leaving the page. Then if they’re unable to answer their own question, help from a real person is just a couple clicks away.

What makes a concierge different from an agent?

***1. Willingness*** is the capacity to be one of the greatest in one’s field, while remaining humble. With humility, comes a passion for continuous learning and a deep-seated desire to be helpful.

***2. Commitment*** is the unrelenting dedication to find a way to make it happen, no matter what “it” is.

***3. Readiness to Take Action***. To borrow the Nike tagline, great concierges “just do it.”

A story that illustrates all three of these qualities was printed in a small brochure that the Four Seasons hotels created to help their guests understand the role of concierges and take advantage of their services. (Remember, not all that long ago, the entire concept was brand new in North America.) The brochure,*The Four Seasons Field Guide To The World Of The Concierge*, told a story that went something like this: A guest told a concierge, “Your cheeseburgers are really great here. I want you to send one to my brother who lives in Bahrain. And oh yes, I want it to arrive hot.” The concierge’s response: “Would that be cheddar or blue, sir?”

***4. Make it personal.*** For the excellent concierges, it’s *always* personal—meaning they bring all aspects of themselves into their work.

Making it personal (while not taking anything *too* personally) is a powerful tool. However, there are times when we need call upon others for help or offer help to others, which leads us to the last quality.

***5. Master Collaboration:*** Success through teamwork and partnership.

1. 30 tips for customer service

Activity

1 hour

Mystery Item!

Each of you will pick a number between 1-25, each number will represent an item/product and I’ll tell you which one it is.

You have 2 minutes to come up with a 5-minute sales pitch about this item! The purpose of this is to know just how well you are able to handle yourself with the unknown and how good your communication skills are!

After your pitch, we will all vote to see if we are sold or not!

What is the most important thing we can do to reduce churn and increase word-of-mouth referrals? The answer is obvious, but it’s often overlooked: improve our customer service.

No matter how awesome the product is, or how talented you think the team is, what our customers are most likely to remember is the direct contact they have with the company.

So let’s do a little crash course and sum up 30 tips for excellent customer service

**#1 Practice Empathy, Patience, and Consistency**

Some of your customers will be full of questions, some just chatty, and others plain mad. You must be prepared to empathize customers and handle all of them and provide the same level of service every time.

**#2 Understand that Good Customer Service is a Continuous Learning Process**

Every customer is unique and every support situation is different. In order to handle surprises, sense a customer’s mood, address new challenges accordingly, you have to be willing to keep learning. Strive to have a deep understanding of your customer’s challenges and continue to search for better ways to address them.

**#3 Ask Customers if They Understand.**

Make sure your customers know exactly what you mean. You don’t want your customers to think they’re getting 25% off when they’re actually getting 25% more product. Ask customers if they understand what you’re saying. Use positive language, stay cheerful no matter what, and never end a conversation without confirming the customer understands and is satisfied.

**#4 Show Your Customers Your Work Ethic**

Customers appreciate a rep who doesn’t pass the buck and sticks with them until their problem is solved. However, you can’t spend too much time handling one customer while others are waiting. You have to stay focused on your goals to achieve the right balance.

**#5 Don’t Be Afraid to Say “I Don’t Know”**

Your customers rely on you to know your product inside out. It’s your job to stay informed enough to respond to questions or at least know where to turn if the questions become too technical for you to answer. If you don’t know the answer it is okay to say to your customers “I don’t know”, as long as you follow it up with “but I’ll find out”. Customers will appreciate your honesty and your efforts to find the right answer.

**#6 You Have to Have Thick Skin**

You know the old saying “the customer’s always right”. There’s truth to that. The best customer service reps have the ability to swallow their pride and accept blame or negative feedback…or handle unreasonable customers in an empathic way. No matter what, your customer’s happiness is your primary goal. If a customer is completely unreasonable, just be human and level with them. Let them know you’re doing your best.

**#7 Pay Attention to Your Customer’s Experience**

A negative customer experience at any point in the customer lifecycle can destroy your relationship. Pay critical attention to key touchpoints: customer trial periods, customer sign-ups, customer on-boarding etc.  Make sure you have a full view of your customer experience, or you risk breakdowns in service that will hurt business. If you discover a lapse in service, make sure to bring it up with your management team so it can be fixed.

**#8 Show Your Customers You’re Human**

Do your best to identify common ground and shared interests with the customers you help. By humanizing your relationship you’ll make resolving conflict easier, your customers will like you more (and as a result, your business).

**#9 Practice Active Listening**

When you use active listening, your customers feel heard. Make sure your customers know you understand them by clarifying and rephrasing what they say.  The key is to empathize with them and reflect their feelings by saying things like, “I’m sorry, I can see why that is upsetting” or “That is a problem and I understand what you’re saying”.

**#10 Admit Your Mistakes**

If you mess up, admit it, even if you discover your mistakes before your customers do. Admitting you messed up builds trust and restores your customer’s confidence in your service. It also allows you to control the situation, re-focus the customer’s attention, and fix the problem.

**#11 Follow-Up After a Problem is Solved**

Follow up with your customers to ensure their issues were resolved properly and that they were satisfied with the service. Give them a call, send them a good support email, or even a feedback survey is a great way to let your customers know you care and you’re still on their side.

**#12 Be Real by Getting Personal**

Your customers want help from real people, not just FAQs and automated emails. Take advantage of social media (Facebook, Twitter, and review sites) and respond when your customers post on your page. Display support team pictures and bios on your website. Show your customers that your company has real people working on their behalf.

**#13 Be Accessible**

Part of the personal touch is being available. You have to make it easy for your customers to reach you. Even if your business is largely online, try to meet in person with local customers or offer video calls (such as Skype) if face-to-face isn’t possible. The more ways you are accessible (via phone, chat, text, email etc.) the more trust you’ll build.

**#14 Rollout the White Glove Treatment**

Make sure you’re meeting your customers’ needs. Consider offering VIP treatment for all customers to make them feel appreciated. Make each of your customers feel like they have a friend in the business.

**#15 Create a Customer Community**

A great way to make your customers feel valued is to create a sense of community around your product. You can do this by bringing your customers together for webinars, interactive websites, social media, blog comments, trade shows and conventions. And even though your customers come to these forums to learn from you, it’s a great opportunity for you to learn from them.

**#16 Make Sure Your Customer Service Team is Happy**

Your customers’ happiness isn’t the only thing that matters. You need to know how your customer service team feels about their working conditions and compensation, opportunities for career advancement, training, available tools and resources, and their peers. Collect feedback from your employees and give them feedback as well. Set benchmarks and goals, and track performance.

**#17 Make Collecting Customer Feedback Easy**

The key to improving your customer service and growing your business is to learn about the good, the bad, and the ugly experience your customers have. But, no matter how on it you are, it’s impossible to get in front of every customer issue. The best thing you can do is create multiple touchpoints that are easily accessible to give customer feedback.

**#18 Know Your Customers**

There is absolutely no substitute for knowing who your customers are, why the bought your product, and what they love or hate about your company. We have tools at our disposal to gather information from your clients to make everything more personalized.

**#19 Practice Clear Communication**

How you communicate with your customers couldn’t be more important. Styling affects communication. Tone affects communication. Watch out for passive-aggressive language (“Actually…”). This will turn off your customers. Also avoid confusing your customers with slang, colloquialisms, or technical jargon.

**#20 Don’t Be Stiff**

When you speak or write to customers be personable, casual, and most importantly be friendly.  Don’t treat customers like a number by using an overly formal tone. Too many companies have customer service teams that sound as if they are robots programmed to speak like a 16th century nobleman. Don’t be a robot nobleman. Have a real conversations with your customers.

**#21 Don’t Use Negative Language**

Here’s an example of negative language in a customer support setting: “I can’t get you an upgrade until next month. Our service is back-ordered and unavailable right now.” Next we’ll give you an example of positive language.

**#22 Use Positive Language**

Here’s an example of positive language in a customer support setting: “That upgrade will be available next month. I can put in an order for you right now and make sure your account is upgraded as soon as it’s released!” See the difference?

**#23 Use the CARP Method**

It’s important for customer service teams to stay consistent in the tone they use and the processes they practice. A great way to do both is to use the CARP method:

—**C**ontrol the situation.

—**A**cknowledge the dilemma.

**— R**efocus the conversation.

—**P**roblem-solve so the customer leaves happy.

**#24 Solve Problems on the First Call**

One of the best ways to keep customers happy and be seen as a company who provides outstanding service is to practice first-contact resolution. In other words, solve your customers’ problems the first time they call in. There’s nothing your customers will appreciate more than getting their issues addressed the first time around.

**#25 Always Close Conversations Correctly**

Every conversation you close with a customer should end with you saying “Is there anything else I can do for you today? I’m happy to help!” and your customer saying “Yes, I’m all set!” loud and clear. Correctly closing a conversation shows the customer three vital things:

— You care about getting things right.

— You’re willing to keep going until you get things right.

— The customer is the one who decides what “right” is.

**#26 Use Customer Service Templates**

It’s important to keep your standards high and your response times low. Don’t waste keyboard strokes reinventing the wheel for every basic and common question. Build scalable templates so you can respond to these types of inquiries with ease and professionalism.

**#27 Help Your Customers Help Themselves**

Good customer support should always be available, even if you aren’t. Make sure you are offering a self-service help desk with top-tier support material for all to see and benefit from. Use screenshots, videos, and clear styling and make sure your how-to’s and FAQs get great reviews.

**#28 Stay Informed with Customer Data**

Don’t rely on “It feels like we spend a lot of time addressing this issue” when customer data can easily eliminate the guesswork. Tracking the frequency of issues as well as the average handle time, will give you the reporting you need to make better decisions on how to improve your business.

**#29 Surprise Customers with an Offline Thank You**

There’s nothing that says thank you like a handwritten note. Taking the time to send a personal thank you letter via snail mail is the kind of unexpected thing that builds rock solid customer relationships. For VIP customers, throwing in a batch of fresh baked cookies or even a Starbucks gift card is a nice touch.  Customer appreciation, therefore, goes a long way in building a healthy customer relationship.

**#30 Remember that Customer Service is Everyone’s Job**

Everyone should be feeling the customers’ pain points. When your whole company is encouraged to be involved in customer service, knowledge of problems, bugs, and features becomes illuminated for the entire team. There’s no faster way to make improvements that drive your business forward. It’s so simple, yet often overlooked: just talk to customers.

Activity

40minutes

**How To Play**

How to say no without saying no.

Go into your sub WhatsApp groups and think about the most insane and elaborate request, you have 10 minutes to do so.

After you come up with a request, you will each share your request amongst the other groups so each group will have a request made by the other, then you have 15 minutes to come up with a way to decline this without saying no.

Choose a team leader or two to recreate this scenario, each group gets 5 minutes of this roleplay

Each employee is to take turns calling out the name on another employee’s tag and make a request.

The named employee is to **decline without saying “No,”** then call another employee and make a request—the process of requesting and declining continues until no request is left.

Complimentary words to use in customer service

Complimentary words are those that we use in a conversation to make the person we are talking to feel good about themselves.

They are generally words to describe an aspect of somebody’s personality/life or to describe something that belongs to the person receiving the compliment.

These words can be particularly powerful in customer service and sales when looking to positively influence the emotions of a customer.

**Using the Top Ten Complimentary Words for Customer Service**

To show you how complimentary words can improve your customer service, we have taken ten of our favorites from the list above and built them into complimentary phrases.

In the text beneath each of our ten complimentary phrases, we explain why the statement can be so powerful in improving customer conversations

**1. “Thanks for being so honest with me about how this is impacting you.”**

After an angry customer has vented at you, it can be difficult to know what to say next. The wrong thing can set the customer off again and damage their impression of you.

A compliment can work well in these situations, if used carefully. Thanking them for their honesty can help to show the customer that you are on their side, before you move forward with answering their query.

**2. “I can see that you’ve been a loyal customer, that’s really great…”**

When checking a customer’s information, you may have noticed that they’ve been loyal to your business for a number of years. This provides you with the ideal opportunity to give a compliment.

By using this compliment, you can show that loyalty is valued by your company in a sincere way that makes sure the customer feels appreciated.

In this example, we also use the word “great” to further emphasize the compliment.

**3.”It’s nice to speak to a customer who has been so proactive.”**

During a conversation where the customer has clearly done their preparation and made sure they have gathered everything they need before the interaction, thank them for that.

Give them a compliment by telling them that it’s nice to speak to someone who has been so proactive. The word “nice” is not only complimentary but also a great positive word.

**4. “I think that was a very wise decision to make.”**

If a customer sounds unsure of a decision or a choice that they have made, support them…

If a customer sounds unsure of a decision or a choice that they have made, support them by showing that you understand their thought process.

“Wise” is a great complimentary word to use in these scenarios, as it removes any sense of judgement from your response and reasserts to the customer that their decision-making has been logical.

**5. “Ah yes, that’s a funny observation.”**

If the customer makes a joke, simply passing over it can make things awkward. So, giving a measured chuckle or a reaction can be important to help move the conversation along.

When the joke does give you a genuine laugh, that’s great for rapport, which you can bolster by acknowledging the customer’s humor and complimenting them for it.

**6. “It’s good that you’ve shared that with me.”**

When a customer opens up to you, validate that and show that you care. Using “good” as a complimentary word in such a scenario can be a helpful technique.

It is not easy for most people open up, especially to a stranger, but if the customer is in a difficult situation, a compliment like this is the ideal way to show them that you are on their side.

**7. “Wow, you live in [INSERT PLACE]. That’s a lovely place. I’ve got family who live there.”**

If the customer shares their address, which you know to be a nice area, this compliment is a great way boost the customer’s ego and give the conversation a friendly feel.

Also, this phrase enables the advisor to demonstrate commonality, which is a great tool in building rapport with customers.

**8. “I can tell that you’ve done some excellent research.”**

From time to time you will come across a “know it all” customer who challenges you on the advice that you give. These conversations can become a little frosty.

**9. “That’s an interesting idea, I can see why you did that.”**

When a customer is explaining their problem, they can feel a little silly if they are describing a mistake that they made.

Remove this negative sentiment by telling them that you understand their thought process and found it to be an interesting or maybe even innovative idea.

**10. “I think that you have made a wonderful choice.”**

“Wonderful” can be a great complimentary word to use when referring to something that the customer has done or, in this case, a choice that they have made.

It helps to reassure the customer that you support their decision and reaffirms that they have control over the choices that they have made.

**How Best to Use Complimentary Words?**

While we have given lots of examples of complimentary words and compliments, the key is to deliver them in the right way. They need to come across as authentic.

A compliment cannot feel like just another box-ticking exercise, which are what soft skills are often reduced down to as part of a contact center quality program.

The compliment needs to land in the right way so it feels natural. This doesn’t happen when you are trying too hard to compliment someone.

How to be more personable with clients

*76% of customers say they view customer service at the true test of how much a company values them.* Learning to properly engage with customers on a personal level is one of the ways to enhance the experience they have, and it’s also a way to enhance your business and take it to the next level.

1. Treat Your Customers Like a Person and Not a Number

According to [Entrepreneur.com](https://www.entrepreneur.com/article/251785), “*Customers should never feel like a number in a long list. Instead, they should feel as if they’re involved in a one-on-one conversation.”*

Activity

40 minutes

2. Be Friendly

Being friendly is part of what makes a customer feel good. If a customer feels good, they are most likely to use your service again.

3. Learn personal facts about your customers.

What does your customer do for a living? What are their children’s name? Learning, and remembering, key facts about a customer can make them feel important and respected.

4. Remember important details about your customer.

It’s all in the details. Does your customer prefer to communication through email rather than talk on the phone? Do they prefer to be contacted a certain time of day? Remembering these things about them will go a long way while you are conducting business with them.

5. Make your customers feel like a top priority.

Even if you’re in a situation where you may be overwhelmed and spread thin, it is still important to make it appear as if the customer is your main priority.

6. Go the extra mile for your customer

Can you remember a time that a business went above and beyond to ensure that you were a satisfied customer? How did that make you feel? Always strive to make your customers feel that way on a daily basis.

7. Be honest with your customers at all times.

Ideally, any business wants to deliver what they’ve promised without any complications or obstacles. Unfortunately, that cannot always be the case. However, keeping the lines of communication open and always being honest is key to providing an exemplary customer experience.

8. Be flexible and willing to meet bend to meet your customers’ demands.

As the saying goes, the customer is always right! Even though this isn’t always the case, thrive to make them feel as if you are doing everything possible to meet their specific needs and demands.

9. Mold the way you do business to fit each customer’s individual personality.

Do you have a customer with a great sense of humor? A customer who is conservative or shy? Make sure that whatever their personality is that you shape your communication style and the way you do business with them to reflect that.

1. Conclusion

The United States is definitely a consumer culture, which means there are countless businesses selling vast amounts of products and services to a large population of people. With this much competition in the marketplace, **having fantastic products and services is simply not enough** to earn loyalty and repeat business. What companies must do is set themselves apart from their competitors, and one effective way to do this is through providing great customer service.

**Customer service may be defined as the ability of an organization or company to tend to their customers’ needs and wants, and to meet – and even exceed – their customers’ expectations**. In that sense, customer experiences should be more than just the purchase of products and services – companies need to focus on satisfying customers and making them feel happy. This is the key to return business, loyalty and word-of-mouth advertising that a happy customer will provide. Great customer service is like a recipe with the most important ingredient being **a meaningful relationship between businesses and clients**. This will help companies achieve their main goal, which is keeping the old customers and attracting new ones. Businesses can reach their clients through a variety of channels, including telephones, websites, online chats and face-to-face interactions. It does not matter what type of channel customers use – what matters is that they always have a pleasant and hassle-free experience.

Key goals for customer service:

1. Identifying Customer Needs – To provide an excellent customer experience, it is most important to **listen**. You and your staff cannot meet the customer’s needs if you don’t know how to properly ask about them and listen carefully. Customers call for all kinds of reasons, and it is important not to jump to a solution without understanding the problem first. The best customer experiences typically consist of more listening than talking.
2. Meeting and Exceeding Those Needs – Don’t just offer one solution. Dig deep to find out how to **meet and exceed the expectations** for a solution. Remember, you are the expert in your field and customers are coming to you expecting that their specific needs will be met and their problems resolved. If those needs are exceeded, customers will become even more satisfied.
3. Successfully Addressing Issues That Arise – In a similar manner, when a person has a problem, the proper customer service approach is to try to**resolve the issue** to their satisfaction – not sidestep it or throw it under the rug. The problem might be the budget, a product, knowledge, or even a type of payment issue.
4. Forming an Ongoing Relationship After the Sale – Maintain **courteous communication**, with or without a happy resolution or a sale. This makes them feel special and appreciated. It’s this type of relationship that leads to a loyal customer base and the much-needed word-of-mouth referrals

Remember:

As previously stated,**human behavior is primarily emotional**, and because of this, it is the most important concept to understand in relation to customer service. Accordingly, it cannot be overemphasized that the human component of service is essential to addressing the customer’s needs and meeting (or exceeding) their expectations. It does not matter how perfect the product or service is – if the **human connection** does not exist between the client and the staff, loyalty will suffer

there are six universal emotions – **anger, disgust, fear, happiness, sadness, and surprise**. All these emotions are responsible for determining daily decisions, so they are important when providing customer service with a memorable moment. If the emotions of happiness and surprise are brought to the surface, customers will have a positive experience and advertise the company by word of mouth. Of course, such experience will make them come back and do repeat business. Both happiness and surprise establish an **emotional connection** that drives loyalty, so it is important to elicit them by providing quality customer service.

So what are the abilities we must ALWAYS have?

Ability to listen

This one is being listed first, because it really is one of the most important customer service skills. Without a good **listening ability**, agents will have difficulty providing quality customer service and compassionately responding to the customer’s needs. Listening, in respect to customer service, includes the ability to receive messages and interpret them accurately. This skill is therefore essential in the communication process, because without good listening, customers might feel misunderstood. Consequently, they will experience emotions such as frustration and irritation, which will make them unsatisfied with the business. To be good listeners, agents must first stop talking and then use non-verbal queues to show the customer that they are receiving their messages. They must focus not only on customers’ words but also on their tone of voice and body language. This will open a good channel of communication between the client and the employee, and enhance the formation of a long-lasting relationship.

***Communication Style***

This skill is also vital for customer service, because without proper communication, the customer cannot get service. Agents must always **communicate clearly and accurately**. They must also articulate their words and written correspondence well to properly convey ideas. Non-verbal skills, such as body language and facial expressions, should also be clear and concise to avoid miscommunication. For example, a client enters her bank to explain why she needs a replacement debit card. The agent should receive her with a smiling face and focus intently while listening to her issue. The agent can utilize an occasional nod during the customer’s explanation to reassure her that they are listening. This is an example of a good communication style for the purpose of quality customer service.

**Positive and Friendly Attitude**

In all aspects of life, a positive and **friendly attitude** can go a long way. This is especially true in customer service. People with pleasant personalities and happy dispositions are more approachable and can carry on a conversation with ease. By training agents to keep positive attitudes, clients will feel relaxed and comfortable while communicating with them. The frontline staff can also help shed light on the bright side of the situation. For example, a woman enters the bank very upset due to the loss of her debit card. As the agent listens to the issue, they can help to calm the upset lady by displaying a **positive attitude**. The agent could say something like: “*Don’t worry; the bright side is that we will protect your account by canceling your old card. We pride ourselves on taking care of our customers, and it will be my pleasure to handle this problem for you. I’ll get a card on the way so you can get back to your holiday shopping* “. This is a use of humor with a positive approach to help the client feel appreciated for being loyal. It also sends a message to the customer that expresses how much her business is valued

***Patience and Self-control***

This interpersonal skill is vital for all aspects of life, especially in the customer service field. People are different, so their approaches to problems that arise within their business relationships will be different too. Some clients can get anxious or angry when confronted with a problem. This is where **patience and self-control** can help to resolve an issue. If a client is unhappy, it is necessary for the agent to be patient at all times. If not, the unhappiness will escalate and the company may lose a customer. Frontline staff must put themselves in the customer’s shoes and handle them tenderly and with their undivided attention.

***Understanding and Empathy***

All interpersonal skills are important, but **empathy and understanding** will simply make agents better at their jobs. Showing understanding of customers´ needs displays respect and compassion, which allows customers to trust their agent. When an agent sees where the customer is coming from and expresses the right amount of empathy, the customer becomes satisfied. Such an interaction will only strengthen the agent-customer bond in emotional-based customer service. Customers will trust agents and know that they are understood and appreciated, which goes a very long way in loyalty and repeat business. It will also make agents feel good about themselves, which will increase their self-worth and self-confidence. With these skills, they will be become better assets for the company as well.

***Assertiveness and Self-confidence***

A **self-confident and assertive** agent will be a good representative for the company because they will exude competence and give the client assurance. For example, when a customer walks into a store unsure of what product is best for their needs, an assertive agent will help guide the customer through the shopping experience, which makes it an easy and enjoyable trip. If the agent seems confident while showing the customer products, the latter will feel more comfortable with their own decisions. Although agents must be careful to avoid being over-confident and coming across as arrogant or rude, they must always exude assertiveness to show knowledge and competence. Without that, the customer may distrust the agent or feel like the received information is unreliable.