Online Training Program

THAT'S CUSTOMER FOCUS:

MAXIMIZING THE CUSTOMER EXPERIENCE

Study Guide and Action Plan

Developed by: The Training Bank

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The Training Bank

Maximizing the Customer Experience Study Guide & Personal Action Plan

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Welcome

Congratulations.

By starting this program you are about to take your journey into the challenging world of service excellence to new heights.

This online program is based on our highly successful classroom training program: *Customers forever: Delivering Exceptional Customer Service.* For the last 15 years, organizations in North America, The United Kingdom, Europe and the Pacific Rim have used the concepts and best practices presented in this program to maximize the service experience their customers encounter with them.

While always important, customer service is becoming even more critical as the means of retaining customers and improving the profit performance of your Organization.

Customers are expecting more from the companies they do business with and exceptional service is the only thing that you can provide which will ensure that your customers' believe that you want and value their business.

Now, you have the opportunity to join the best-of-the-best and become a certified customer excellence specialist.

I encourage you to dedicate the time you need to understanding and applying the concepts and practices we will be covering in this comprehensive online program.

We hope you find this program, educational, interesting, helpful and fun.

Good luck and good learning.

Sincerely:

Ray Miller
Author and Trainer

About this Study Guide and Personal Action Plan

This Study Guide and Personal Action Plan has been developed to help you get the most out of this online training program.

There are eight training modules in the online program. Within each module you will have an opportunity to complete short quizzes. In addition to these quizzes we have included a number of learning exercises. The exercises are designed to help you work with the concepts presented in the course modules and by using the Personal Action Planning tools, develop your own plan for how you will apply what you learn in this program to your job.

Once you have completed your plan, please arrange to meet with your supervisor to review your plan in detail. This meeting is your opportunity to discuss specific customer service issues with your supervisor, to clarify any questions you may have regarding any of the topics or best practices covered in this course and/or how these topics and best practices relate your particular area of responsibility.

Please Note: Be sure **to take plenty of notes** regarding any key information you wish to have available to refer back to after you have completed each module.

We have provided extra pages in your study guide for notes.

Please be sure to print a copy of this document and have it with you as you complete the modules of this course.

How to use this program

Complete instructions on how to use the online course is included in the Introduction module to this program.

Here are some tips on how to maximize your learning experience.

1. Allow plenty of uninterrupted time to complete each module.

To help you plan your time, here are the average times needed to complete each Module. The time it takes to complete a module will vary from person to person. Accordingly we have provided a typical range of time to help you plan your studies. The entire program takes from 6 to 7 hours to complete.

Module	Average time to complete
Introduction	8 - 10 minutes
Module 1: Why Service?	36 - 40 minutes
Module 2: What is Customer-Focused Service?	30 - 35 minutes
Module 3: What Customers Want	40 - 45 minutes
Module 4: Customer Expectations and Perceptions	40 - 45 minutes
Module 5: Moments of Truth and Coffee Stains	90 - 100 minutes
Module 6: Internal Partners	50 - 55 minutes
Module 7: When Problems Occur – Service Recovery	40 - 45 minutes
Module 8: Enhance and Align the System	30 to 35 minutes

2. Work in an area away from distractions, noise or telephones.

3. Tell your supervisor when you will be working on a module so that coverage of your work can be arranged and/or work on the modules during less busy periods.

4. Follow all the online instructions and click on all the links provided.

5. Complete all the Pop Quizzes and Final Quizzes.

6. Be sure to complete each part of your Personal Action Plan when instructed to do so during the program.

7. Write down any ideas or questions that occur to you as you work through the topics so that you can review these later with your supervisor.

8. Be sure make a note of anything you wish to refer to later.

9. Complete all the modules within 3 months from the time you start the course.

There is a time limit for completion of this course. Be sure to complete it within the 3 month period.

Learning Activities

This Study Guide contains learning activities. These are in addition to the quizzes you will be completing online. These activities are designed to help you apply your understanding of the information presented in the online training program.

If you have not already done so, please print out a copy of this document and have it with you as you work through the various modules of this program. Complete the activities as instructed.

These activities include:

Exercise 1: What are Your Customers Worth?

Exercise 2: Finding Out What Your Customer's Expect

Exercise 3: Your HEART Monitor

Exercise 4: Cycle of Service- Moments of Truth

Exercise 4.1: Succeeding at My Moments of Truth

Exercise 5: Coffee Stains

Exercise 6: My Internal Partners

Exercise 7: How Good a Service Partner Are You?

Exercise 8: Requirements and Consequences?

We have also provided you with some notes pages so you can make a note of anything you wish for ease of reference later.

About the Personal Action Plan

This Personal Action Plan will help you to apply what you have learned as you complete this online course.

This plan has two components. The first component is an analysis form which raises key points covered in each module, key questions to ask yourself and space to identify specific action steps you plan to take based on what you will start, stop and continue doing as a result of what you learned in each module. There are eight parts to this tool. One for each module in the course.

The second component of this tool is a simple organizer on which you can consolidate your action steps as well as plan for how you will implement these steps.

Once you have completed your plan, arrange a time to meet with your supervisor to review your plan. During this meeting, take the opportunity to clarify any questions or issues you may have identified during the course and to discuss any additional help and/or support you will need in order to successfully implement your plan.

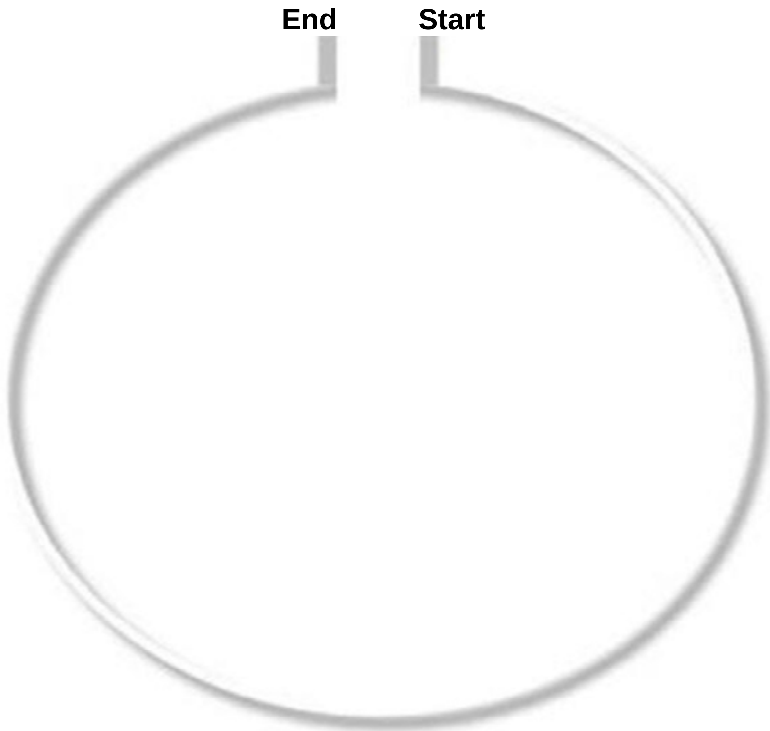
Be sure to complete your plan when directed to do so in each module of the course. Do not wait until you have finished all eight modules as you could easily miss something important.

Notes For Module 5: *Moments of Truth and Coffee Stains*

Exercise #4: *Moments of Truth - Cycle of Service* **page 1**

1. Using the blank Cycle of Service diagram provided below, trace the flow of the customer through your Organization or Department and identify the Moments of Truth.

Cycle of Service



2. Select one of your moments of truth from the diagram and list what other individuals or departments are involved in the success of that moment of truth.

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Turn to the next page and complete Questions 3, 4 and 5.

Exercise #4: *Moments of Truth - Cycle of Service* **page 2**

3. For the MOT you have selected, record what you would need to do in order to satisfy the customer.

4. For the same MOT, identify what could be done to impress the customer.

After you have finished this module you may wish to come back to this exercise and complete questions 2 to 4 for your remaining moments of truth.

Exercise #4.1: *Succeeding at My Moments of Truth* page 1

In this exercise, for each Moment of Truth review each of the actions taken and then place a check mark in the columns to the right which best reflect what you currently do at these Moments of Truth. Then complete Part 2 as instructed below.

Part 1

Moment of Truth and Action Steps	I do this now YES	NO	n/a
You receive an inquiry by email a) Respond to the inquiry right away b) Either provide the information the customer requires in your response or, if you need time to gather the information, indicate in your response when you will be getting back to the customer c) Fulfill the customer request within 3 hours of receipt d) Confirm with the customer that your response meets his/her requirements e) Thank the customer for his/her request			
You receive an urgent request by email a) Analyze the request and if possible respond immediately b) If you are unable to provide the information immediately, acknowledge the request by email and tell the customer exactly when you will provide the information c) Respond with the information requested when you said you would d) Confirm that the information meets the customer's requirements e) If not, clarify and provide additional details f) Confirm the additional information meets requirements g) Thank the customer for his/her request			
You receive an inquiry by telephone a) Answer the telephone within 3 rings b) Identify yourself and your department c) Ensure that you understand exactly what information is being requested d) Provide the information e) If you are unable to provide the information immediately, tell the customer exactly when you will provide the information f) Call the customer back as promised g) Refer to your supervisor if the request is beyond your level of knowledge and explain to the caller what you are doing h) Transfer the call to your supervisor or provide a response as instructed by your supervisor i) Confirm that the information you supplied meets the customer's needs j) Thank the customer for his/her request			

Continued on next page

Exercise #4.1: *Succeeding at My Moments of Truth continued* page 2

Part 1

Moment of Truth and Action Steps	I do this now YES	NO	n/a
You receive a request by email for an exception or for something that falls outside of standard procedures a) Acknowledge receipt by email immediately advising when you will have an answer. b) Analyze requirements and if necessary contact the customer by telephone to clarify any questions you might have c) Refer the request to your supervisor for direction d) Based on the direction from your supervisor, contact the customer by telephone with the solution e) Confirm that the solution meets the customer's requirements f) Thank the customer g) Confirm the steps taken by email or telephone			
You receive a request by telephone for an exception or for something that falls outside of standard procedures a) Thank customer for calling. b) Clarify customer's situation and requirements c) Analyze requirements resolve immediately if you have authority to do so. d) If matter needs to be referred to supervisor, explain to customer including time needed and ask customer when it would be convenient to call customer back. e) Refer the request to your supervisor for direction f) Based on the direction from your supervisor, contact the customer by telephone with the solution by or before the designated time. g) Confirm that the solution meets the customer's requirements h) Thank the customer i) Confirm the steps taken by email if appropriate.			
Customer contacts you by telephone with an urgent need a) Thank customer for calling. b) Clarify customer's situation and requirements c) Analyze requirements resolve immediately if you have authority to do so. d) If matter needs to be referred to supervisor, explain to customer including time needed and ask customer when it would be convenient to call customer back. e) Refer the request to your supervisor for direction f) Based on the direction from your supervisor, contact the customer by telephone with the solution by or before the designated time. g) Confirm that the solution meets the customer's requirements h) Thank the customer i) Confirm the steps taken by email if appropriate.			

Continued on next page

Succeeding at My Moments of Truth continued **page 3**

Part 2

Go back and review your responses. Look for any action steps that you marked “NO”. Plan to incorporate these steps into your actions in the future.

Be sure to include how you plan to accomplish this in your Personal Action Plan at the end of this module.

Exercise #5: *Coffee Stains*

1. Take exactly 5 minutes and walk around your office. Take a pen and this page with you and make a list of as many Coffee Stains as you can see in the time allotted.

2. When you are done, continue with the next page of the course

Personal Action Plan – Part 5: *Moments of Truth and Coffee Stains*

Points to Consider:

- Identify your Moments of Truth.
- Determine who is involved and what must be done to ensure success at these Moments of Truth.
- Accept responsibility for the success or failure of those Moments of Truth.
- Remove all Coffee Stains consistently.

Ask Yourself:

Do I have a clear idea of my Moments of Truth (MOT)?

Do I currently deliver a level of service at these MOTs which, at the minimum, satisfies each customer?

Do I wipe up “coffee stains” whenever I see them?

! THINGS I WILL START DOING

X THINGS I WILL STOP DOING

✓ THINGS I WILL CONTINUE DOING

Personal Action Plan Summary Worksheet

Goals	Activities	Schedule	Potential Obstacles and Obstacle Removal Strategies