CUSTOMER SERVICE GUIDE TO BEST PRACTISE PROCESSES

WHERE TO COLLECT AND WELCOME CUSTOMER FEEDBACK

Why is this important?

Recognising the points of contact with the customer will provide the organisation with 'pain points to be eased' and critical points of opportunities to provide service excellence.

Every customer has a journey before and after their transaction with you. So to identify where to provide the opportunity for the customer to provide you with feedback it is necessary to draw out a complete customer journey through this whole period.

Ask yourself, what are the channels through which a customer can contact you? How easy is it easy for the customers to communicate with you at the point of contact? It is essential that there is a system or process in place at each point of contact to facilitate the customer being able to provide feedback and for the feedback to be captured and dealt with appropriately. The process should be applied to each stage of the customer journey from start to finish, from the first point of contact to the last.

Once all the points of contact have been identified, the consideration should be about the process of capturing feedback. Customers are not always going to volunteer there thoughts and opinions and will need prompting.

Therefore any feedback forms or questionnaires should be highly visible at the point of sale or at exit points and front line personnel should be encouraged to proactively engage with customers to obtain feedback.

Many large companies go through this identification stage over time and continuously tweak these 'points of awareness' to gain the most information they can to help improve their service delivery.

Of course – once the feedback channels are opened – you then have to have the processes and preferably the technology coupled with the right attitude and behaviours in place to capture and use this new information. Otherwise there is no point in collecting the feedback in the first place!

KEY MESSAGES:

- Feedback matters to an organisation.
- Understanding where the role of feedback sits as a part of a basket of measures.
- Feedback is used as part of a strategy to increase overall customer experience.

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HOW TO CHOOSE THE RIGHT DESCRIPTIONS TO LOG THE CUSTOMER FEEDBACK

Why is this important?

Easy to read, logical descriptions will be remembered by the person logging the feedback and prevent guess work or the use of 'other' which is of no use to anyone for root cause actions.

Accurate descriptions will make sense to the right area of the business to help put things right.

The identification of the description is not as easy as it sounds.
Each description must match the customer journey correctly, both for the customer and the staff. The 'staff' meaning those recording it and those understanding the reporting to understand exactly what it means.

It is best practise to involve other areas of the business to select the description for the feedback for the following reasons:

- Each department will identify with the end management reporting because they have selected the part of the customer journey that affects them personally and described it in their own way.
- The reporting is in their language that they use day to day – so the description of the contact is meaningful to them.

So - for example – the customer has called to say that the bill is wrong and they have been overcharged. If the description you have selected is just 'overcharge' then that covers a multitude of costs covering many parts of the customer journey. Which means that it might be applicable to any area/department and so it is then 'owned' by none to solve. End result - there is no point in logging or reporting.

On the other hand, if the description is clear to all, then the identification from what the customer is saying is easy to log and for the report reader to understand and then own.

So a better example is 'overcharge' followed by exactly 'what' from the invoice is the offending charge. Or 'poor service' is followed by exactly where in the customer journey that the customer perceived this to be the case. Or 'additional booking' is followed up by 'another seat' or 'another date' and the detail. And so on.

An easy way to identify what to have as descriptions is to chart out the customer journey first. Walk it yourself to give you a good idea of what a customer is likely to want to tell you. Not in your head – actually do the customer journey yourself.

You can draw this in a flow chart perhaps to help identify what the customer might want to tell you, and will help with training the staff to know what to ask for to make sure the identification is correct.

So for example, take a retail shop:

The marketing and the pre selling to identify you in the first place and then the physical contact with you -

- How does the customer find you? –eg: phone call, txt, email, via travel agent, in person, marketing brochure and the code, arrived by plane, train, car – etc. (finding you has been proved to be a cause of distress even before anyone has purchased from you) Are your signs clear, are you positioned in a prominent site on the high street or hidden in a back street.

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HOW TO CHOOSE THE RIGHT DESCRIPTIONS TO LOG THE CUSTOMER FEEDBACK: CONTINUED

Then detail all the processes, the logistics and the customer information.

- What do you sell? How do the products arrive at the shop? What logistics are involved, eg: delivery, suppliers, how they get from the delivery to the shelves? List all your products and where they are in the shop, associated products and information about them – are they easy to find, good signs that the customer can read, relevant information about contents, recipes etc.
- How does the customer select what they want? List what support information you have. The dates of issue for accurate information?
- Can the customer find a member of staff to help?
- What are the times that the staff take lunches/breaks/fill up shelves? So the time of the incident they are telling you about is relevant to the staff organisation as well. So you will need to log the time of when this happened to the description list.
- What about the housekeeping in the shop? Cleanliness, wrong prices, no stock on shelves, boxes in the aisles?
- How and where does the customer pay? Can they find the payment tills, are there signs? Are they obvious? How many tills? Was there a queue with a wait which was unacceptable? How is the queue handled at busy times, a notice to queue here, a queue management system –eg rope, ticket, small purchase till? How long did the customer have to wait? How can the customer pay? Do you accept all forms of payment and which?
- Where can the customer give feedback in the shop? Are there forms? A customer service point? What to do if a complaint/feedback is not handled in the shop – is there a notice of what to do?
- Where is the exit? What would be the lasting impression of leaving the shop?
- Is there a follow up action? An invoice sent? Is it easy to read, how is it broken down? What about the chasing letter for payment or service reminder, is the language customer friendly? Is an item delivered afterwards, how does this happen, what information is given to the customer, what logistics are necessary to make sure it happens as the customer expects?

By walking the customer journey yourself, it is easier to describe this. By double checking your language selection with the members of staff who actually work in these areas will give you a good grouping of descriptions and the detail for each department to work from.

The descriptions must be kept up to date and relevant.
It is easy to change these and identify redundant ones which can be removed. Try to avoid generalisations like ‘other’ or ‘miscellaneous’. Include as many drill down identifications as possible to really pinpoint exactly what the customer is saying to help the department to understand and then improve whatever is needed.

KEY MESSAGES:

- Walk the customer journey to identify all the steps.
- Remember to include perceptions and influences before they arrive and after then have gone past all the customer facing points.
- Keep the descriptions relevant and up to date – often revisit these.

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LOGGING/RECORDING OF THE CONTACT

Why is this important?

So the company knows the number of, the priority, the reasons of the type and the efficiency of the handling of the customer contacts.

So the customer has trust in the fact that their feedback is accurately recorded.

All customer contacts/feedback must be recorded and logged into a central system. If the contact is received at an outlying store/depot etc, there must be a mechanism for the contact to be recorded and forwarded to the central records. Ideally every customer touch point in the organisation should have an IT system in place which is easy to use for all staff to be able to log that feedback.

The contact should be logged to a description which is an accurate recording of what the customer has reported. Ideally all staff throughout an organisation should be provided with clear guidelines and examples of which description to use to ensure consistency and clarity.

This accurate logging is very important because it will provide the management information to identify root cause problems for changes in procedures and processes in the customer journey, as well as providing opportunities for further customer loyalty programmes and customer excellence practice.

For example, this contact and the reporting will provide local analysis as well as consolidation reports. Therefore the right description and accuracy of the customer feedback is paramount right from the start. If inaccurate information is entered then reporting will be meaningless to the audiences it is provided to in order to help improve any customer delivery programme.

The descriptions should be updated on a regular basis to accurately reflect the customer journey. They should also be grouped together for summary analysis as well as detail. Ideally customer verbatim comments should be captured to help further identify the customer perceptions as well as process issues. Sometimes a customer will comment on the personal service delivery as well as the process, and this again will be helpful to identify training needs.

KEY MESSAGES:

- Revisit contact descriptions regularly to ensure they reflect the customer journey.
- Record the contact as accurately as possible.
- Rubbish in – rubbish out.

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DIRECT, LOG AND RECORD THE FEEDBACK

Customers will contact you for a number of reasons; it could be before, during or after a transaction has taken place. It is therefore important that all staff are provided with the tools and the training to assist customers with their enquiries.

There should be a flow chart in each customer service handling area clearly showing the handling and pass off of contacts to other areas.

DIRECTION AND OWNERSHIP

Why is this important?
So the staff know where to direct any customer feedback they cannot handle themselves.
So the customer can trust that their feedback will be handled by the right area.

Contacts and feedback will arrive by a variety of means, eg: letter, fax, email, phone call, txt – to any area of the business.

Everyone in the company should be empowered to accept and welcome customer feedback and to record it.

All staff should be able to resolve a customer query or complaint to the best of their judgement but also must be aware of when and where to direct a customer complaint or any feedback which is outside of their control.

Getting the contact to the right place for further handling is a critical factor in customer satisfaction. For example, if a customer calls and is transferred to several different parts of the organisation, and perhaps not to the right place at all - he is likely to be discouraged, creating additional dissatisfaction and more likely to generate negative word of mouth advertising, which may result in escalation both inside and outside the company.

The customer service departments will generally handle the customer contact after a transaction has been completed and probably after an invoice has been issued. It is necessary that all staff in this department are aware of the full customer journey and processes throughout so that a knowledgeable and confident response is provided.

KEY MESSAGES:

- Everyone to welcome any customer feedback.
- All staff to know where to direct the contact if they are not able to handle or record it.

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IDENTIFYING THE ROOT CAUSE

Why is this important?

So the staff and management have an opportunity to put local errors and processes right to continually improve their own service performance.

So the customer can trust that their feedback has been positively used and will be happy to report their findings/perspectives on future service delivery again.

In the case of complaint recording and reporting, the objective of root cause corrective action is to reduce customer risk. This is the amount of business that is at risk as a result of less than perfect service in the eyes of the customer. Typically, this is caused by issues within a company's control and therefore is entirely preventable.

Therefore is it important that the root cause of the problems should be identified through reporting to the right areas and steps taken to eliminate errors on a regular basis as part of a business habit. This will help to ensure that you retain customers.

To ensure that root cause actions are correctly identified, the contact must be recorded on receipt and accurately coded into the system database. Relevant reporting both in detail and summary reports are necessary for departments/areas and senior management to understand and seek to find the root of the cause of the negative feedback to make a change. For positive feedback it is also important to identify where, what and who delivered that experience for the customer to maximise future opportunities.

Finding the actual root cause of that feedback is not easy. It could be local error, process, procedure or company decision to 'do business that way'. Or it could be a training need or customer perspective. Often it is necessary to track back or across the organisation and include more than one area of the business to make a difference and change or improve the actual root cause.

Local actions

Analysing the detailed reporting locally, specific actions should be decided to reduce the errors and the number of contacts by 'doing the job right first time'.

It is essential that the information produced is presented to the different areas of the business in a format that is easy to read and understand and applicable to the department or area it is presented to.Each department/area should recommend ideas to change the way they currently operate to reduce the complaints/queries whilst improving process systems.

The key is to identify the breakdowns in the cycle of service that cause the most risk and to focus resources on those areas. The overall objective is to set up a closed loop self-correcting process.

Head Office or Central actions

Summarised reporting showing trends and complaint descriptions will help identify key stations or subject matter for each area. These high level reports will assist Head Office/senior management to find root causes, identify product weaknesses and make decisions on improving or changing processes or procedures.

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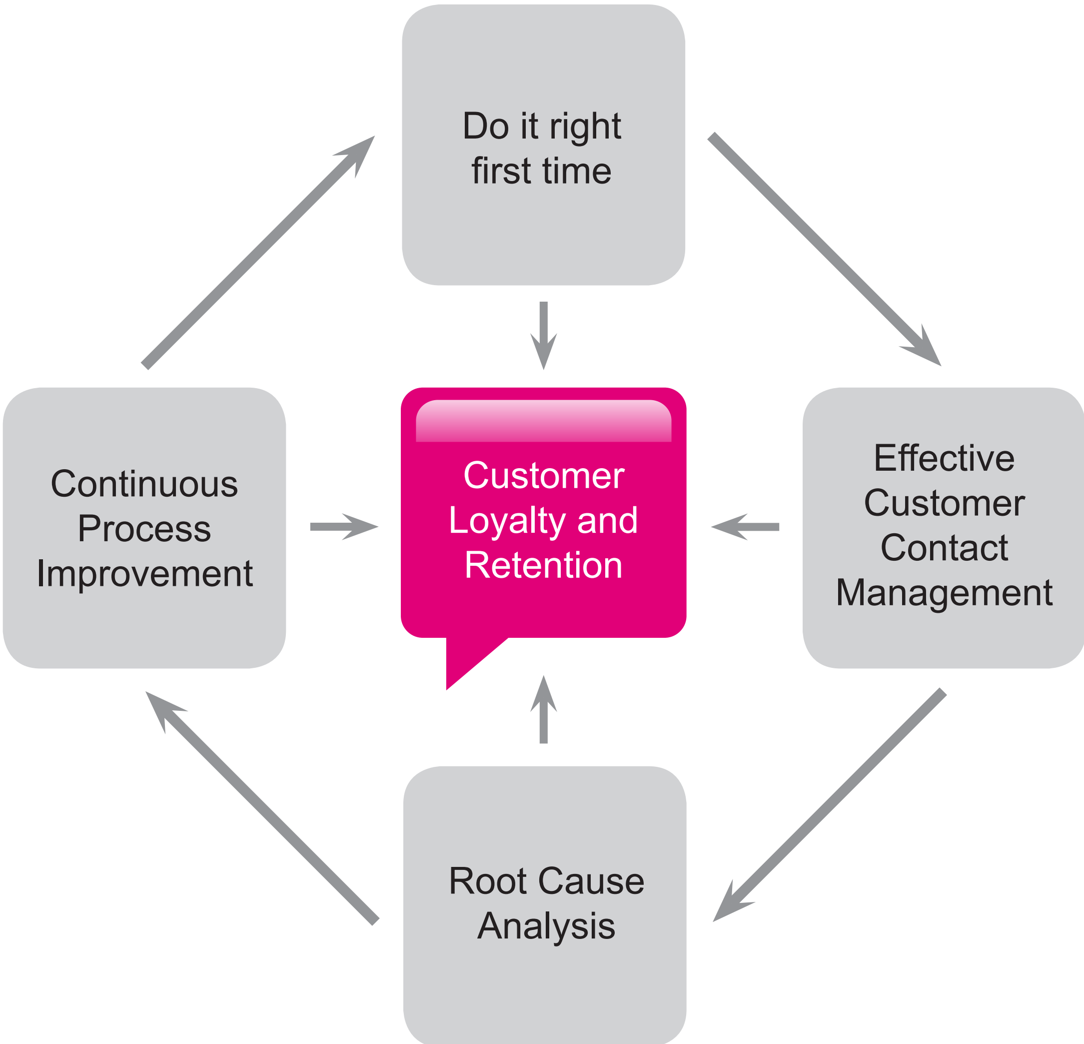
IDENTIFYING THE ROOT CAUSE: CONTINUED

Continuous improvement example:



KEY MESSAGES:

- The right information recorded will enable accurate reporting to help identification, analysis and diagnostics to improve service delivery.
- Working locally, centrally and across the organisation will be necessary to deliver successful continuous improvement.