



SAMPLE – SALES REPRESENTATIVE

December/04

SERVICE ORIENTATION

Behaviours

Conducts research to identify key customer needs and organizational realities prior to meeting with a prospective customer

Provides data, information and documentation to support any claims made during a sales call

Demonstrates an interest in each customer using common sense, body language and intuition to strike an appropriate balance between casual and work related conversations

Sends out product related information on a regular basis to keep customers (current and potential) up-to-date and “in the loop”

Demonstrates respect for customer’s time by informing customer at the outset of a meeting how much time will be required, and following through as indicated



ON-THE JOB ACTIVITIES TO CONSIDER...

- ✓ You need to have data and documentation readily available to support any claims you may make during a sales call.
 - Consider what have been the repercussions in the past when you have not had that information available?
 - Before meeting with a client, develop an action plan consisting of each step you need to take in order to be fully prepared for the meeting.
 - Remember to bring any documentation that may be required to each sales call you make.
 - Talk with others to learn about what they do to ensure their credibility, and incorporate this information into your personal development action plan.

- ✓ When attempting to satisfy your customer's needs, always take the time to consider several different options. Keep in mind the requirement to meet customer needs while simultaneously taking into consideration resource constraints. Also, consider conducting a cost-benefit analysis of various approaches to meeting your customer's needs, and then use the approach that best balances customer needs with internal resources.

- ✓ When interacting with your customers, put yourself in their shoes. Think about how you would want to be treated as a customer and behave accordingly. For example, do you?

- Demonstrate an appropriate personal interest in each of your customers?
- Strike an appropriate balance between casual and work related conversations with your customers?
- Demonstrate respect for your customer's time?

If you answered "yes" to one or more of these questions, think of examples that support your response. Discuss this with a trusted colleague to ensure they see your behaviour the same way you do. If you discover they *not* perceive your behaviour to be not as positive as you do, seek out advice and suggestions from someone within the organization that you feel exemplifies excellent customer service.

If you answered "no" to one or more of these questions, identify someone within the organization that you feel exemplifies excellent customer service. Ask them if they would be willing to meet with you to discuss how they developed their excellent customer service skills, and to give you advice and suggestions as to how you can begin to incorporate new and more effective behaviours into your customer service repertoire.

- ✓ Over a one-month period, keep a log of the frequency and type (formal and informal) of contact you had with your customers. Assess the log at the end of one month. Consider the following:

- Is there anything you can do to increase your availability and visibility to your customers?
- Who tends to initiate most of your contact with your customers?
- Under what circumstance do you tend to initiate contact, and under what circumstances does your customer tend to initiate contact?
- Does your pattern of contact with your customers clearly indicate to them your prime interested is serving their needs and not our own?

- ✓ The following steps are essential in order to clearly convey your commitment to understanding your customer's needs and doing whatever you can (within reason) to satisfy these needs.

1. Learn everything you can about your customers.

- Talk to them about their needs and what you can do to help them, e.g., improvements to your products, better customer service, etc.
- Talk to the marketing staff within your organization about their ideas for new products and product enhancements.
- Keep on top of changes in your industry and your customers' industries by reading trade journal, industry reports, joining a professional association, etc.

2. Maximize customer satisfaction and loyalty.

- Identify customer requirements and expectations and take whatever action is required to not only exceed, but to surpass them.
- Develop a special relationship with your customers *outside the expected buy/sell relationship*. This is an idea way to help ensure you have an "inside track" when a new business opportunity arises.
- Analyze your customer base. How has it changed over the past number of years? If you notice your number of clients has decreasing, this is a "red flag" that must be explored and attended to.
- Consider why you may have lost some of your customers. Then, come up with a plan for what you can do about this. If you are having difficulty coming up with viable reasons, talk to others to get their input and ideas.
- If there is not already one, identify a mechanism for obtaining customer feedback.
- Talk to people who are not your customers and find out why.
- Always thank your customers for their business.

3. To help improve the quality and depth of relationships that you have with your customers, do the following:

1. Make a list of all customers you have regular contact with, and then use the scale below to evaluate the quality of each of these relationships:
 - 1 = *Poor relationship (i.e., there is a current serious problem which has not been resolved).*
 - 2 = *Adequate relationship (i.e., strictly business/transaction oriented).*
 - 3 = *Reasonably good relationship (some successes but room for improvement).*
 - 4 = *Extremely good relationship (many successes and some social contact).*
3. Identify any barriers that may be getting in the way of customer relationships and identify specific actions you can take to remove these barriers.
4. Set a date for improving the relationship with each customer on your list.
5. Monitor your progress against your goals and set a date for re-evaluating each of your customer relationships.

✓ Educate yourself by gaining as much knowledge as you can about common issues and problems your customers face. Draw from your own personal expertise and experience, as well as from input from others, to identify what would be the best solution to these common customer issues and problems from the customer's point of view. Then implement them

✓ Develop and implement a customer survey:

- Prepare a list of survey questions, making sure to include the following two questions:
 - How you can be more helpful to your customers?
 - How you can help your customers be more successful?
- Review the draft survey with your manager.
- Conduct the survey.
- Analyze the results and prepare a report for presentation to your manager, team and/or colleagues.

✓ Keep on top of shifts in customer requirements and changes (internal and external) that are likely to impact your customers' needs and interests over the next few years:

- Talk to your customers about their short and long-term needs, including what you can do to improve your products and customer service. Ask customers about their goals – where are they headed in the next year, two years, five years? What do they want to accomplish? How can you help them get there?
- Involve customers in the design of new products as they are the ones who know exactly what their needs are.
- Read trade journals, industry reports and joining professional associations related to your customers' industries

Once you have determined what major changes are likely to occur, consider how your product/service may need to be altered in order to be able to meet customer demand and expectations in the future.

✓ Have a discussion with your manager about the types of customer service issues and problems you have the authority to resolve on your own.

- Make every attempt to resolve these issues on your own, but keep your manager up-to-date on all important issues and problems you are currently dealing with.
- Don't hesitate to ask your manager for assistance when you need it.
- Follow up with your customers to make sure the issue/problem was adequately resolved.

- ✓ Ask your manager about a particularly challenging customer problem he or she is currently dealing with. Offer to work with him or her to help resolve the situation.
 - Prepare yourself by learning as much as you can about the customer's issue and/or problem.
 - Use your expertise and experience to consider what problem solving strategy would be best from the customer's point of view. Discuss this with your manager.
 - With your manager's knowledge and support, take whatever steps are required to ensure this customer gets the service they require and deserve.

- ✓ Talk to others in your profession *outside* of your company to find out what they do to provide excellent customer service.

- ✓ Ask your manager or a colleague to observe you with a customer and provide you with feedback. Encourage them to be open and honest when providing you with feedback.

- ✓ Over a one-month period, keep a log of situations where you observed excellent customer service demonstrated by others. What patterns of behaviour did you observe?

- ✓ Treat everyone you work with with an equal amount of respect and consideration, including customers, suppliers, team members, your manager and peers.

- ✓ "Talk up" examples of customer service and excellence within your company.

- ✓ Brainstorm with your colleagues/team about what you can do differently to enhance your customer service orientation and effectiveness.

- ✓ Think of something special you can do for a customer, and do it.

- ✓ Keep an eye out for articles and brochures that might be of interest to your customers, and give them a copy.

- ✓ Send product related information to all your customers and potential customers on a regular basis.
- ✓ When new services, procedures or policies are implemented, monitor their progress to ensure your customers are positively, and not adversely, affected.
- ✓ Make sure to take the time to reinforce and recognize your colleagues when you observe them demonstrating excellent customer service.

ADDITIONAL RESOURCES TO HELP ENHANCE YOUR PERFORMANCE AND BE MORE SUCCESSFUL...

Please note that many of the resources (books, video, seminars, courses and programs) listed in the *Negotiation/Sales Skills, Professional Maturity and Focus on Results* competencies would also be useful to develop and/or enhance behaviours listed under this *Service Orientation* competency.



READ

Hug Your Customers: The Proven Way to Personalize Sales and Achieve Astounding Results,

Jack Mitchell (Hyperion Press, 2003)

Hugging your customers has nothing to do with being touchy-feely but everything to do with offering over-the-top service. Learn why knowing your customer, thinking outside the box, and having a "no problem" attitude is key to sales success!

Clients Forever: How Your Clients Can Build Your Business for You

Doug Carter and Jennifer Green (McGraw-Hill, 2003)

Carter and Green show you how you can increase your income by decreasing your sales calls. Instead of working fruitless hours to wring sales from reluctant customers, you can focus your efforts on your favourite clients and build solid, long-term relationships with them.

Creating and Delivering Totally Awesome Customer Experiences

Gary W. Millet and Blaine W. Millet (Customer Experiences Inc, 2002)

This book identifies what organizations need to do to create customer loyalty, strengthen their brand, build lasting differentiation, and deepen their relationships with their profitable customers.

Loyalty-Based Selling: The Magic Formula for Becoming the #1 Sales Rep

Tim Smith (AMACOM, 2001)

Becoming the top-ranking sales rep is the burning desire in the hearts of thousands of reps. This action-packed book offers seven powerful steps to get to the top.

The Brave New Service Strategy: Aligning Customer Relationships, Market Strategies and Business Structures

Barbara A. Gutek and Theresa Welsh (Amacom, 2000)

This book helps the reader discover how service providers can survive and prosper in the increasingly impersonal information age. Learn how to design and build your business in such a way that excellent service is guaranteed.

6 Keys to Achieving Success Through Customer Service

John L. Myers and Tara A. Blanc (Heritage Publishing, 1999)

A practical guide to help you learn and practice service skills in six key areas: attitude, communication, product knowledge, appearance, personal standards, and initiative.

Enterprise One to One: Tools for Competing in the Interactive Age

Don Peppers and Martha Rogers (Currency Doubleday, 1999)

Companies today need to harness technology for competitive advantage. The authors explain what strategies are applicable under what circumstances, how to retain customers and increase business and how to create entirely new markets of customers by taking advantage of new technology.

Best Practices in Customer Service

Ron Zemke and John Woods (AMACOM, 1998)

The authors combine 35 articles that clarify the connection between great customer service and superior organizational performance. Learn what customers really want and how to create systems to meet their needs.

Best Practices: Building Your Business with Customer-Focused Solutions

Robert Heibler, Thomas B. Kelly and Charles Kettelman (Simon & Schuster, 1998)

The authors shares data and their understanding of how forty best practice companies worldwide focus on their customers, create growth, reduce costs and increase profits.

Customer Satisfaction Is Worthless, Customer Loyalty Is Priceless: How to Make Customers Love You, Keep Them Coming Back and Tell Everyone They Know

Jeffrey Gitomer (Bard Press, 1998)

To longtime sales and customer-service pro Jeffrey Gitomer, boasting about a near-perfect customer-satisfaction rating of 97.5 percent is a major mistake. "That means 2.5 percent of your customers are mad and they're telling everyone." Based on a philosophy that's been developed through his syndicated business columns and the more than 150 seminars he gives each year, the book outlines his formula for making customers so faithful they "will fight before they switch, and will proactively refer people to buy from you."

You Will Be Satisfied

Bob Tasca (HarperBusiness, 1997)

In this book, Tasca (with Peter Caldwell) shows the route he has taken from the opening of a Ford Motor dealership in tiny Rhode Island some 40 years ago to perennial designation as one of the world's top car dealers. He believes his unwavering focus on customer satisfaction, detailed here, can be applied successfully in any sales-related business.



WATCH

INTERNATIONAL TELE-FILM, (1-800-668-0749)

URL: <http://www.itf.ca/>, offers a number of films and training resources dealing with *Service Orientation*. For example,

Taking C.A.R.E. of Business - Choosing to Deliver Remarkable Customer Service

From greeting customers and gracefully managing several at once, to handling dissatisfied customers and keeping a fresh outlook at all times, this 23-minute film emphasizes personal accountability as it teaches employees to actively improve their customer service skills.

Secret Service: Making Customer Service Work

This three-part program takes a hidden camera into five businesses to see how they treat their customers. The first video (58 min.) looks at the practicalities of providing effective customer service. The second two videos were filmed at Lincoln County Hospital, Virgin Atlantic, Burger King and London Underground. This program includes a Trainer's Guide.

Please also look under their *Sales* category for a variety of films addressing *service orientation* skills specific to sales representatives.

CUSTOMER SERVICE UNIVERSITY (1-800-575-4001)

URL: <http://customerserviceuniversity.com>, offers a variety of *Service Orientation* videos in English, Spanish and 9 other languages. For example,

Fish! Catch the Energy. Release the Potential. (#1 Training Video from 1999 – 2002)

Learn to have fun at work! Shot in Seattle at the famous Pike Place Market Fish Company, this video illustrates how the employees of this great fish company have found the secrets to having fun at work and delighting customers.

FORMAVISION (+33 (0) 1 47.08.12.12) URL: <http://www.formavision.com>

offers a variety of English and French training videos, including a series of *Service Orientation* videos. For example,

Best in the Field

Through a series of dramatizations, this video showcases examples from several industry and service environments. These examples guide customer service and field representatives to a greater knowledge of effective interpersonal skills that will benefit them, customers, and the company. Learn how to:

- *Deal with angry customers quickly and effectively.*
- *Listen for key facts needed to solve service problems.*
- *Project a positive, professional customer service attitude every time.*
- *Avoid playing the 'blame game'.*
- *Build stronger, more profitable customer relationships.*

Please also look under the *Sales* category for a variety of films addressing *service orientation* skills specific to sales representatives.

THE RICHARDSON/MCKAY TRAINING SOLUTION (1-888-281-8038)

<http://www.trainingabc.com/>, offers over 3000 training videos, including a wide variety on *Service Orientation*. Please see web site for a complete listing.

Please also look under their *Sales* category for a variety of films addressing *service orientation* skills specific to sales representatives.

ENTERPRISE MEDIA (1-800-423-6021) URL:

<http://www.enterprisemedia.com/index.html>, offers has a variety of films dealing with *Service Orientation*. For example,

Beyond Close to the Customer

Before a live audience, Tom Peters presents an instructional, how-to program on customer service in which he discusses 20 specific proposals that need to be addressed by any organization striving for superior customer service. (111 minutes)

ATTEND COURSES AND WORKSHOPS



(Current as of December/04)

The following are recommended **public** programs designed specifically to enhance *Service Orientation* skills. If you would like to know more details about any of the programs listed, simply log onto the web site by clicking the link.

For information about our **internal** programs related to *Service Orientation*, please access our intranet and/or contact your Human Resources Representative.

SCHULICH BUSINESS SCHOOL, YORK UNIVERSITY (416-736-5079) URL:

<http://www.schulich.yorku.ca/ssb-extra/ded.nsf/public+seminars+/-conferences/alphabetically>, offers a variety of quality training programs. One in particular that addresses the issue of *service orientation* is:

Customer Relationship Management

This program is a blueprint for maximizing the profitability of your business. Did you know it is 5 to 10 times cheaper to hold on to the customers you already have than to acquire new ones. Statistics support that a mere 2% cut in customer defections means the same to the bottom line as a 10% cut in costs. This is Customer Relationship Management (CRM), and every company wishing to compete over the long term, had better have an aggressive CRM program in place

Customer Focus: Satisfaction and Service, AMERICAN PRODUCTIVITY AND QUALITY CENTER, 1-800-776-9676, URL:

<http://www.apqc.org/portal/apqc/site/content?docid=109325>

In today's markets, the competitive arena has shifted from strictly product and price to areas of customer satisfaction and customer service. The function of providing customer service is no longer a task of one person or one department. As companies realize the true cost of losing a customer and what it costs to gain a new one, the "service" mentality is spreading from the top to the bottom of progressive organizations. This two-day, interactive seminar focuses on the spirit of customer service.

WATERLOO MANAGEMENT EDUCATION CENTRE (1-800-265-9726)

<http://www.watmec.com/2003/PUBLIC/publicSet.asp>, offers a number of quality training programs. One in particular that addresses the issue of *service orientation skills* is:

Building High Quality Customer Service

Learn what superior service is and how to bring it to life in your company, as well as the four steps to providing superior service. Learn how to: identify customer behaviour; optimally deal with customers; and calm upset customers.

Managing Superior Customer Service, AMERICAN MANAGEMENT ASSOCIATION, URL: <http://www.amanet.org/index.htm>

These days, simply servicing customers is not enough. If you want to hold onto customers and market share, you and your staff must deliver customer satisfaction with every client contact. Learn how to fire up your staff so that they convert every service call into a “satisfaction delivered” call.

This program is an example of one of the many seminars and courses offered by the American Management Association in major US Cities

BLANCHARD TRAINING & DEVELOPMENT offers a number of one and two-day seminars in major US cities. Their web site <http://www.kenblanchardcompanies.com> lists a variety of seminars particularly useful for managers at all levels of the organization. For example:

Raving Fans

Based on the best-selling book by Ken Blanchard and Sheldon Bowles, this workshop revs up commitment to customer service with a common-sense approach. First, decide you want. Second, discover what the customer wants. Third, deliver the vision plus one percent. Participants explore ways to differentiate their organization from the competition and pinpoint the critical details that make or break the customer's experience.

CAREER TRACK, URL: <http://www.careertrack.com/index.asp> (1-800-780-8476) offers seminars, tapes, CD ROMs and on-line courses. An example of a public seminar addressing *Service Orientation* is:

How To Deliver Exceptional Customer Service

This seminar teaches ways to work easily with others and create a more pleasant environment. Learn: how to communicate with customers in person and over the phone; helpful skills for dealing with angry customers; tactics for keeping your composure under stress; and much more.

PADGETT THOMPSON offers a number of one and two-day seminars in major US cities. Their web site <http://www.tregistry.com/ama.htm> lists a variety of seminars particularly useful for the new supervisor or manager. For example:

Coping Skills For Customer Service Professionals

Reduce your day-to-day job stress and develop an interpersonal communication style that makes it easier to please your customers.

INSTITUTE OF MANAGEMENT STUDIES, URL: <http://www.ims-online.com/>, offers programs in 27 regions across Canada, the US and Europe. For example:

Everyone Has Customers: Keeping Yours Happy

Learn a variety of tools that are guaranteed to keep your customers happy.

Driving Growth and Profits by Focusing on Your Customers

This workshop will provide a framework for developing, implementing and evaluating a market driven strategy, as well as highlight the key role of customer equity in a company's success.

THE ACA GROUP, 1-888-262-1727, URL: <http://www.theacagroup.com/training.htm>, offers a number of on-line training programs. Classes are conducted live and are interactive. For example,

How to Improve Customer Service

Participants learn how to: define a customer and differentiate between internal and external customers; identify good customer service when they see it; understand the three areas of focus for customer service improvement: list, discuss and demonstrate the 10 dimensions of service quality; and have the ability to plan and implement customer service improvement projects using the eight-step method.

DISNEY INSTITUTE, URL: <http://www.disneyseminars.com>, 321-939-4600 offers programs using the Walt Disney resort as a living classroom. Learn about “the business behind the magic” through programs such as:

Quality Service

This program explores strategies for understanding customer needs and expectations

Loyalty

This program is ideal for those seeking proven ideas that generate superior bottom line results through greater customer and employee loyalty.

ENTELECHY, URL: <http://unlockit.com>, 1-800-376-8368, offers a variety of training programs and modules. Two of their modular programs that would be particularly useful in assisting with the development of this competency are:

High Performance Customer Service

Today's companies compete on service. Excellent products and efficient distribution channels are merely entry fees to play the game. Winners will differentiate themselves on the service they provide customers. Accordingly, this program has been designed specifically to increase the long-term performance of customer service professionals. Learn how to make your company a winner, or at least a company that finishes behind the winner.

High Performance Sales

To succeed in this challenging environment, sales professionals must be able to: maximize every selling opportunity through creative and efficient planning; form lasting business relationships that stand up to competitive pressures; identify and pursue opportunities that have real value to them and to the customer; communicate the value of recommendations and solutions in the customers' language to ensure a thriving business relationship; and close business and leverage the sale for future opportunities and reference. This comprehensive modular program is designed to address all of the above issues, thereby increasing the long-term performance of selling professionals