

The background of the entire page is a white surface covered with a dense, scattered pattern of small, colorful confetti pieces in shades of red, blue, yellow, and purple. A solid red horizontal band spans the top of the page, serving as a background for the main title.

# icmi™ & HDI® TOOLKIT

Celebrating Customer  
Service Week

**SPECIAL EDITION**

# 7 ROLES CUSTOMER SERVICE MANAGERS MUST MASTER



## AMBASSADOR

**Advocates for team members and their careers**

*Why it's important:*

**Leads to improved employee satisfaction & engagement**

*What happens if it's missing:*

**Employees feel under-appreciated**



## BACKER

**Proactively removes roadblocks for his/her team**

*Why it's important:*

**Encourages upward communication & trust**

*What happens if it's missing:*

**"CYA" behavior**



## ACCELERATOR

**Finds ways to eliminate wasteful and redundant work**

*Why it's important:*

**Makes it easier to recruit high-performers**

*What happens if it's missing:*

**High performers leave**



## GALVANIZER

**Rallies the team toward a compelling vision of the future**

*Why it's important:*

**Makes everyone feel included**

*What happens if it's missing:*

**Satisfaction with the status quo**



## CONNECTER

**Communicates frequently through multiple channels**

*Why it's important:*

**Easy accessibility builds trust and improves teamwork**

*What happens if it's missing:*

**Disconnected work and wasted time**



## BUILDER

**Challenges each team member to continuously improve**

*Why it's important:*

**Employees know where they stand**

*What happens if it's missing:*

**Poor performance**



## TRANSLATOR

**Helps the team understand how their works impacts the bigger picture**

*Why it's important:*

**Leads to improved employee satisfaction & engagement**

*What happens if it's missing:*

**Disconnected employees, missed opportunities, bad decisions**



**ICMI**

**HDI**

# How to Develop a Customer Service Vision

# How to Develop a Customer Service Vision

How can you reach your goals if you don't know where you are going?

Delivering world-class customer service starts with clearly defining what outstanding service looks like. This is often referred to as a customer service vision, and without it you can't give your employees clear direction.

There are three hallmarks of a strong customer service vision for a company, team, or individual:

- The definition is simple and easily understood
- It describes the type of service we want to achieve for our customers
- It reflects both who we are now and who we aspire to be in the future

## How to Develop a Customer Service Vision

Begin your process by reflecting on your purpose for having a customer service version.

- Take a moment to explore other customer service vision statements. (Great examples of this include The Ritz Carlton, L.L. Bean, USAA, and In-N-Out)
- Determine the scope of your vision – Is it for an entire organization or just one team?
- Identify items that might influence the new vision, such as your current mission statement, customer service slogans, or service stands.

Then, it generally takes three steps:

1. Gather input from employees.
  - a. A great question to ask them is, "What do you want our customers to think of when they think of the service we provide?"
2. Assemble a small team to write the vision (it takes just two hours with a skilled facilitator).
  - a. Invite at least one frontline employee, one mid-level manager or supervisor, and one senior leader. This ensures that you'll have someone to "keep it real", someone who links execs to the frontline, and someone with the authority to make things happen.
3. Share the new vision with all employees to gain buy-in.
  - a. Make sure that everyone can answer these questions:
    - i. What is the vision?
    - ii. What does it mean?
    - iii. How do I contribute?

**Tip Sheet: Training  
on a Shoestring Budget**

# Tip Sheet: Training on a Shoestring Budget

Find yourself in the position of needing to do more with less? Here are some tips on low or no cost ways to train your team!

## **Use free online tools**

Popular video sharing websites such as YouTube are a cost-effective and brilliant way to keep your call center training sessions interactive, fun and engaging. These websites offer a wide variety of free video footage – everything from humorous clips showing the top ten ‘call center disasters’ to more serious footage demonstrating examples of high-quality customer service techniques.

These videos act as a great discussion starter for training sessions, staff can be given time to find their own examples of good and bad practice and share their learning with the team.

Online video clips can also help to inspire other, more classic, training techniques such as role-play. Managers can show examples of poor customer service from YouTube and ask staff to role-play the way they think the call should have been dealt with.

## **Get the WFM folks into the classroom**

From a workforce management and operations perspective, it’s a great idea to get WFM (Workforce Management) folks into the classroom to sell employees on adherence and give practical tips on hitting key performance indicators. To build enthusiasm and make top performance an achievable goal, bring top-performing employees into the room to share their energy, passion and secrets for being the best in the business.

## **Pilot groups**

A great place to start with developing a coaching culture is to have a small group of people who participate in a pilot of the scheme. This allows you to ‘iron out’ any changes before launching to the whole organization. Pilot groups provide valuable feedback on how systems are working in practice, and allow any changes to be made before a wider launch. Pilot groups often become the biggest champions for successful projects and are of significant value when implementing wide organizational changes.

## **Partner with other similar companies**

In the areas of people skills and team working, it may be useful to partner with other similar-sized companies in the same area as you. Staff from each company could attend, with costs being shared proportionately.

## **Skill up line managers**

Skill up line managers to deliver training to small groups of their staff on key topics that will improve productivity. It has the added advantage that people get to know their team mates better.

## **Provide a library**

Provide a library of books and DVDs that people can use to increase their knowledge in their spare time.

# Tip Sheet: Training on a Shoestring Budget

## **Lunch and learn**

Start lunchtime learning sessions where staff can elect to deliver a session on their topic of choice. Even if the topic isn't work-specific, you're giving staff the opportunity to see a different side of their colleagues, and the person delivering the session is able to share their energy and enthusiasm for something they're passionate about. Great for upping the energy levels. Great for engaging staff.

## **Focus on staff engagement as well as technical ability**

Ensure you have committed resources for training and development; training not only nurtures technical ability but also increases staff engagement, helping to motivate and retain talent.

When thinking about training look closely at what skills are needed within your team. In a customer service call center, training will often focus on product knowledge, complaint management or questioning techniques in first-call resolution. In a sales-based call center, training will also focus on ensuring employees are able to advise customers on the best-fit product or service.

## **Training doesn't always have to happen in the classroom**

Training needs to relate to the job at hand, so why move people away from the place they'll be working in? If possible, incorporate relevant training into the working day, into the tasks and activities agents have to complete whilst dealing with customers. Online training tools can also be incorporated, freeing people from the classroom and indeed the training center and allowing training to take place on a genuinely 'as needed' basis.

## **Time is money**

Don't minimize the initial training time to save money. Efficient use of time in training is essential. In other words, make every minute count. Eliminate exercises that don't add value to the trainee, programmer, or client. Utilize the time in training by integrating the new information with practice. Be flexible within the classroom. Employ different learning methods for different situations and utilize leadership. This often requires a prepared, experienced, connected trainer.

## **Involve me, not tell me**

Ensure the curriculum has very little lecture, but is mostly practice. That is, the curriculum should be interactive and engaging.

Learners should NOT be idle – they should be doing.

# **6 Ways to Creatively Motivate & Retain Employees**

# 6 Ways to Creatively Motivate & Retain Employees

There are many ways to make gamification happen in your workplace. While there are countless systems and automated tools available, it is much more than buying a piece of software. A personalized effort is required to create a true value-add program. While it can be helpful especially for “moment of need” training, software rarely changes culture. In the end, it all comes down to authentic human relationships.

Here are a few ways that gamification can help you to motivate and retain your employees.

## **Know your audience**

Gamification should not be a “top down” effort. Include the individuals who are going to be participating in the program while creating it. Understanding the interests of your employees and what motivates them will be paramount to the program’s success. Also consider the goal you are looking to accomplish. Is this a training program or an employee experience program? The two will look very different. For Kevin Hegebarth (@kghegebarth on Twitter) gamification is “a formal program of collecting rewards based on the attainment of well-documented goals.” The concept will look very different when applied in different support environments.

## **Competitiveness vs. Collaboration**

For many gamification programs, it is all about competition and moving to the top of the leaderboard. These types of initiatives often work well in a sales environment. Be careful when choosing one of these for your group, as they can often do more harm than good. In a service center, generally a more collaborative approach is best. Reward the individual behaviors that create success for the larger team and for your customers.

## **Always Mix It Up**

This is not a program you can put out at the beginning of the year and have it run on autopilot. Think about why we are drawn to games...they simulate a unique and exciting experience. As soon as that game ceases to challenge us or surprise us, we will stop playing it. Authoring a gamification program requires you to think like a script writer for the show LOST. You have to bring your group on a journey that will keep them interested and excited for the long haul. As soon as you lose your passion for the program, your employees are immediately behind. Find a couple of leaders you can partner with to share the load and add to the pipeline of creative ideas.

# 6 Ways to Creatively Motivate & Retain Employees

Looking for some specific things to try? Here are a few of favorites from the team at Underwriters Laboratories:

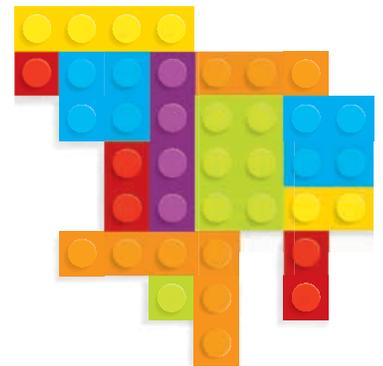


## Wheel of Happiness

The team elects a “rock star” each week that then spins the wheel of happiness. There is a whole variety of fun rewards on there, and we change them around regularly. Some of the rewards are for the individual; others are shared by the whole team. The real magic is with peers recognizing peers for outstanding behaviors.

## Lego Feedback

Give your employees a way to “build their reputation” with customers. Purchase a base plate for each person. Whenever positive feedback is received on surveys or otherwise, they are rewarded with different shapes and colors of Legos. It gives them a chance to build their own “customer legacy towers” in whatever fashion they see fit. It is always nice to see a tangible evidence of the great work that is being done in a service center.



## Support Film Festival

Have people work in teams and create funny videos. The UL team ordered a bunch of “academy awards” off of Amazon and gave them out for different categories such as best actor and actress. The event itself is a blast, but one of the greatest things is that the videos last forever. When new hires come in they get to show off our videos and bring them into the culture right away. This one is also great for team building.

There are thousands more and countless ideas yet to be tried. Don’t be afraid to try brand new things! The worst that can happen is that you don’t do something again, and your employees will appreciate the effort even if it is not executed perfectly.

# **The 8 Things You Should Never Say to Customers**

# The 8 Things You Should Never Say to Customers

1. **“No.”** A boss once told me, “Never tell a customer no. Always say, ‘Yes, we can. Here’s what that will cost.’” If you absolutely can’t provide a certain product or service, you can’t, but often you can’t simply because you don’t want to. (In the example above I didn’t want to. What the customer had asked for was certainly possible but would have been a real pain to pull off.) Price unusual requests accordingly: If you can make a decent profit, why not? Making a profit is why you’re in business.
2. **“Are you sure?”** Customers are often wrong. Too bad. Never directly doubt their statements or their feelings; all you’ll do is make an already bad situation a lot worse. Instead ask questions or seek to better understand. Saying something like, “Can you walk me through that one more time so I can make sure I can take care of what went wrong?” validates the customer’s position while helping you keep the conversation objective and solution-focused.
3. **“What you should do is...”** Don’t tell me what to do. Help me. That’s why I came to you.
4. **“That’s against our policy.”** Maybe it is against your policy... but if the customer wasn’t aware of the policy ahead of time, who cares? Any terms or conditions not spelled out in advance are irrelevant to the customer. Imagine you’re a customer who finds out after the fact that special order items can’t be returned — how would you feel? Refer to policies or conditions when the customer was fully aware of and agreed to those conditions; otherwise, find a way to fix the problem. Unstated policies are your problem, not the customer’s.
5. **“No problem.”** Maybe this is just a pet peeve, but I’m always irritated when, say, I ask a waiter for dressing on the side and he says, “No problem.” I know he means “yes,” but “no problem” still implies I really am causing a problem. When I’m the customer, I’m favoring your business with my patronage; your business isn’t doing me any favors, so never imply you are. Replace “no problem” with “yes.”
6. **“Let me try to do that...”** Customers care about results, not effort. Tell me what you will do. “Trying” creates greater uncertainty, and uncertainty is the kiss of death to a customer relationship. If a client requests an accelerated delivery, say, “I’ll call our distributor and get the best schedule possible.” All you can do is all you can do. Don’t imply you’re working extra hard on my behalf by “trying.”
7. **“Let me know if you have any other problems.”** If a customer comes to you with a problem and you think you’ve resolved that problem, great. But don’t expect the customer to contact you if other issues pop up; follow up a couple days later to make sure all is still well. Solving a customer’s problem meets expectations; following up to see if they need further assistance shows you care.
8. **“I’ll get back to you as soon as I can.”** Maybe you will... but in the meantime the customer is left wondering what “soon” means. Always specify a time. If, when that time comes, you still don’t have all the information you need, contact the customer and say so — and say when you’ll follow up again. Customer relationships are based on managing expectations; “as soon as I can” sounds good but fails to set an expectation the customer can count on.

**Sample Voice of  
the Customer Report**

# Sample Voice of the Customer Report

*We provide this framework as an example of how to define and communicate a daily agent voice of the customer program. It may be duplicated or modified based on the needs of your organization. We encourage you to use it as a starting point for collecting customer feedback.*

## **Purpose of our VOC Program:**

1. Reveal customer needs that we don't currently know.
2. Validate our perceptions and plans based on what we do know.

## **What types of information should you provide?**

1. Customers mentioning the impact of external factors on them/their relationship with the organization. (The economy, recent news, personal life choices, etc)
2. Customers mentioning the impact of internal factors on them/their relationship with the organization. (Hours of operation, cost of services, product quality)
3. Customers mentioning products or services that they wished we would provide and/or stop providing.
4. Any other comments, observations, or ideas that arise out of your interactions with our customers.

## **How we'll use the information you provide us:**

1. Measure and evaluate trends on an ongoing basis to help inform future business decisions.
2. Share insights across the organization, particularly the marketing department and executive committee, to ensure that decisions consider this level of customer insight.
3. Report back to all of you with how this information is being leveraged and utilized

## **What should your VOC emails look like?**

To: CustomerServiceDirector/TeamManager/Etc.

Subject: VOC 10/15/16

Body: Today I received 22 calls from customers wishing that our cancellation policy was longer than 14 days. When I asked them what they would like to see as a cancellation policy, all of them said, "at least, 30 days."

Your feedback may only be a few sentences on some days, or a few paragraphs some others. The important part is that you're providing this type of feedback on a daily basis. We encourage you to start a draft email at the beginning of each day and add comments and ideas as they come to you. The more details that you're able to provide regarding a particular customer's comments, the better, so be sure to ask probing questions when the opportunity presents itself.

If you're ever not sure if something belongs in your VOC email, don't hesitate to ask your supervisor or any member of our leadership team. We're all here to help you and want to be sure that you feel fully equipped to do your job. Thank you in advance for all of your help!

# **5 Lessons for Building (or Rebuilding) Trust**

# 5 Lessons for Building (or Rebuilding) Trust

If you want to build (or rebuild) trust, follow these five simple lessons:

**Commitment:** Showing up is an essential part of commitment. It means diving into the deep end and fully committing to the task at hand. It involves following through and doing what you say you'll do. Keep your commitments, no matter how small or large. Do what you say you will do. Always. (If, for whatever reason, you can't keep a commitment, communicate with the other party and ask to be released from it.) Commitment means being accessible and available to the client or customer. It means staying true to what you said you would do long after the time you said it. If you make a commitment to deliver, then you have to communicate with the client or customer if you can't keep your promise.

**Caring:** People will be loyal to you if they know you care about them, and that includes both the people who work for you and the customers who purchase your products or services. Customers will accept your advice if they know you care about them, so listen to them when they call. You can show care by providing comfort or comforting words during turbulent times and by demonstrating genuine concern. If trust has been damaged because the client or customer felt they weren't well cared for, then your staff needs training in empathy and customer service.

**Consistency:** If you make a mistake, own it. Decide what your values are and use them to make decisions. They will guide you and keep you constant. How consistent is your product, service, and delivery? People will base their expectations on your past and present performance. If you're inconsistent, then it's time to bring in the quality control people and streamline your operations.

**Competency:** People will question your competency if they don't see it in action. If you're a manager, manage. If you say you're the best at something, then make sure you are. Don't be satisfied with mediocrity. Be the best you can be. Keep your skills fresh by being a lifelong learner. Is your staff seen as capable and competent? How do you know? Make sure that you and your staff are all well trained, but delegate to people who show proficiency in specific tasks.

**Communication:** When you're having a conversation with someone, do they have your full attention? Are you allowing the frustrations of the day to affect the tone of your voice? Give people your full attention and show them, through your pauses and comments, that you hear them. Communicate with them in a way they understand. Make sure that communication is healthy. As a leader, recognize that mistakes can be used to teach. You can start by admitting when you make mistakes. Increase the candor and frequency of your communications and find opportunities to share experiences that build bonds. During stressful times, make sure that you take the time to explain what is happening.

# 10 Tips for Building an Exceptional Customer Service Team

# 10 Tips for Building an Exceptional Customer Service Team

If you're a customer service manager, your number one goal is to serve customers. In order to serve those customers effectively, you have to ensure that all the people, processes and technology are in place to get the job done well. In an industry where attrition is particularly high, building the right customer service team can be the biggest challenge of all.

Do you have plans to staff up this year? Perhaps goals to increase CSAT, improve agent retention, or boost morale? It all starts with your team.

If you're looking for ways to attract, hire, retain, and develop an exceptional customer service team, we can help. ICMI asked ten of our Top 50 Thought Leaders to weigh in with their opinions. Based on their advice we've compiled ten tips for building an exceptional customer service team:

- ✓ Hire the right people
- ✓ Define exceptional service
- ✓ Put yourself in the customer's shoes
- ✓ Create a culture of servant leadership
- ✓ Look for "SPARKLE"
- ✓ Encourage open dialogue & cohesion
- ✓ Create trust
- ✓ Don't neglect your agents
- ✓ Make sure the agent selection process matches your desired service outcome
- ✓ Tools and training are the linchpin

# About ICMI & HDI

## About ICMI

The International Customer Management Institute (ICMI) is the leading global provider of comprehensive resources for customer management professionals -- from frontline agents to executives-- who wish to improve customer experiences and increase efficiencies at every level of the contact center. Since 1985, ICMI has helped more than 50,000 organizations in 167 countries through training, events, consulting, and informational resources. ICMI's experienced and dedicated team of industry insiders, trainers, and consultants are committed to helping you raise the strategic value of your contact center, optimize your operations and improve your customer service.

## About HDI

Founded in 1989, HDI is the first membership association and certification body created for the technical support industry. Since then, HDI has remained the source for professional development by offering the resources needed to promote organization-wide success through exceptional customer service. In other words, we help professionals in service management better serve customers. We do this by facilitating collaboration and networking, hosting acclaimed conferences and events, producing renowned publications and research, certifying and training thousands of professionals each year, and connecting solution providers with practitioners.

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