

Put Yourself in the Customer's Shoes

A Whitepaper on Customer Service

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Your complimentary copy

**For additional copies, or for more information about the
Put Yourself in the Customer's Shoes 1-day workshop,
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Put Yourself in the Customer's Shoes

The Harvard Business School lecturer, Theodore Levitt said: “The primary business of any business is to stay in business – but to do that you have to **get** and **keep customers**.”

The *Put Yourself in the Customer's Shoes* program upon which this whitepaper is based, is a major initiative to promote two essential messages:

- That in an increasingly competitive market, quality of service to the customer is crucial to success. It is no longer sufficient, or acceptable, to just pay lip-service to service, and
- That every single member of the organisation has a part to play and a contribution to make. **Customer service is everybody's business!**

For many companies, this may be the first time they have united all members of the organisation from all levels and departments behind a common goal to such a degree. They are doing it, not because they think they are bad at customer service, nor do they need to use customer service as a secret weapon against their competitors.

We all have people on our teams who are very talented and dedicated and, as with most businesses, we have a range of services to offer our customers. Hopefully, we are all growing and can be proud of our achievements and have confidence in our future.

But we cannot afford to rest on our laurels. The marketplace is dynamic, consumers are much more sophisticated and far more knowledgeable. If we are to maintain our rate of growth, we must continue to retain existing customers as well as attracting new ones – particularly in view of the fact that it costs *at least* six times more to get a new customer as it does to keep an existing one. As highly regarded as we might be for our quality of customer service, excellence means striving for higher goals. We are *good* at customer service, we need to be **better**.

There is one other aspect to this program and it is spelt out in this whitepaper. The principles of customer service apply just as much in our dealings *with each other* as they do to our dealings with customers.

So, there are two critical points to keep in mind when considering the philosophy of putting yourself in the customer's shoes:

- The customer is vitally important to all of us, whatever our job or position. Either we serve the customer directly or we support those who work directly *with* and *for* our customers, and
- Within the organisation, no matter how large or small, we are all customers of each other. Whenever we have dealings with another person, office, section or department, they become our customers and our attitude to them should be exactly the same as the attitude we exhibit to our customers outside the company. In fact, how we treat each other is often an accurate reflection of how we treat external customers.

Who We Are

The range of services we can offer may be diverse and comprehensive and no doubt we claim that the quality of our work is second-to-none. We have excellent people; we have superior products and services. Yet, with all this, we have to recognise that other companies can probably boast something similar about themselves.

What is it that distinguishes the good from the not-so-good, the successful from the unsuccessful?

What makes the difference? It is the **quality** of customer service.

When a number of companies are trying to market the same, or similar, products (as very few of us have a monopoly on the market), the customer will opt for the company or person who can deliver the service in the way in which the customer wants. Therefore, we have to ensure that service delivery is **always** excellent. That is the practical demonstration of putting ourselves in the customer's shoes.

Knowing The Customer

Customer service is not a complicated matter. All you have to do is ask yourself – what irritates, upsets or puts *you* off when you are a customer?

Then make sure it does not happen to your customers.

The fact is, that in general, people do not complain about poor service – they just don't come back! They simply take their business elsewhere. What they also do is tell other people – **lots** of other people, about the unpleasant experience. A bad reputation can spread rapidly and potential customers can be easily frightened away.

While there is no doubt customers expect technical excellence from us, it is usually not a lack of this that causes customers to leave or potential customers not to come to us in the first place.

Customers are looking for:

- ✓ quality of service
- ✓ individual attention, and
- ✓ a real interest in them, their needs and wants, their problems and issues, and what they are doing.

You will agree that this is not a particularly complicated recipe for success. The trick is to do it **EVERY TIME** – at face-to-face meetings, over the telephone, in writing, even at those times when you are under pressure and thinking about other people's concerns would most likely be the last thing on your mind.

Starting From The Inside

How we conduct business with a colleague, a coworker, inside the company will affect our attitude to those we deal with outside. It is impossible to adopt one approach with one set of people and a completely different one with another group.

Several highly successful organisations have spent a considerable amount of time and money looking at the sort of work climate that encourages an attitude of caring for the customer. The most important aspects were found to be:

- people who worked in the organisation were trusted to get on with the job
- people were prepared to take responsibility and to delegate
- support, coaching and mentoring of team members was encouraged
- clear objectives were set and communicated to the team
- giving people feedback on their work performance was vital, and
- management really *led* rather than supervised.

The lesson seems to be that where people are prepared to be open and honest with one another, can express their views, where people look for opportunities to praise rather than criticise, and where delegation and feedback are commonplace, the company will not only be a productive and enjoyable place to work, it will also be very good at demonstrating to its customers that it cares.

You Can Make a Difference

The temptation when thinking about attitudes to customers or those affecting the way in which we work, is to say that it is up to the company or, it's someone else's responsibility, or exhibiting a "That's not my job" attitude. While it is true that there is an overall responsibility and some people are in a better position than others to make changes, it does not subtract from the fact that each of us bear an individual responsibility.

Things change because people change them. Organisations are collections of people and that means **us**. If we want to change the way we behave and operate, we can.

And the first step is, knowing ourselves.

The Chinese philosopher, Lao Tsu said: “*He who knows others is learned, he who knows himself is wise.*”

There are all sorts of theories about self-analysis and personal behaviour patterns. Remembering the theory or jargon is not important. What is important is acting upon the few simple underlying messages to which all the theories point.

They will help you feel better and more positive about yourself and this, in turn, will have a desirable effect on the way you work with your customers.

- Give people praise whenever you can
Give praise to the people who work *for* you and those who work *with* you. People respond well to it, they feel good about themselves and carry this over into their dealings with others.
- Be positive about yourself
No one respects those who are conceited or unrealistic, but adopting the attitude of ‘I can help, I can do something about it’ is realistic self-confidence. Others will see you as a helpful person, always willing to find a solution or a way forward.
- Do not persuade yourself into failure
It is all too easy to let our often irrational thoughts that ‘we aren’t good at that’ become a self-fulfilling prophecy.
- Be straight-forward in the way you deal with people and respond to them
You have rights and needs, these are important. Other people also have rights and needs, these are equally important. Emphasising one to the neglect of the other does no relationship any good. Trying to accommodate both parties through mutual respect and consideration is the productive way forward.
- Act like an adult
This is not as simple as it sounds. When things get tough or situations become a little emotional, the tendency for some people is to take a dogmatic, ‘I know best’ approach, to become aggressive or even childish (‘you said that, so I’m going to do the opposite’).
People usually feel bad about the way they acted, but by then it is often too late.
- Do not take criticism from a customer or a colleague as a personal attack
Recognise it for what it is – feelings expressed by another person that should be acknowledged. Acknowledging it does not mean simply accepting it. Put it ‘outside’ yourself as a piece of behaviour to be discussed. After discussing it, you may accept that your behaviour has to be changed and that the criticism was justified.
- Recognise your own way of working
We each have a style of our own which we like to adopt when we work. Understanding what our preferred style is helps us to accommodate other people who will also have their own favoured ways of operating.

We *can* make a difference by knowing ourselves. Once we do understand ourselves, we can choose to change the way we do things, if we want to.

Generally, being positive about ourselves and what we are capable of, will exhibit a positive attitude to both colleagues and customers. *Success breeds success and it leaves clues.* Being positive does not mean promising more than we can deliver or taking on more than we can possibly handle. It does mean having the confidence to make things happen, not to stand back and be a mere spectator. It means taking the initiative, having a go, taking 100% responsibility, and not blaming anyone else. And the best part is – *it works!* You feel better, get greater job satisfaction, feel less pressure and are happier in your dealings with colleagues and customers. The customer will see it too.

Creating The Right Impression

Rightly or wrongly, we often base our judgements of people on the impressions they create. It is less to do with solid evidence and more with feelings and emotions. We need to be aware that we make the right impression. How do we do it?

Research shows time-and-again that people make up their minds about another person within four minutes – or less – of meeting them. Make the most of the first four minutes. It seems that four minutes is the time we feel obliged to pay someone attention, anything less appears rude.

In that time, people meeting one another will pick up on how important they are, or are not, in the eyes of the other person, how much the other cares, is interested, concerned, enthusiastic, willing to help or otherwise.

Get it wrong at the start and it is an uphill struggle to redeem the situation. It is vital to send out positive messages in the beginning in order that the relationship proceeds in the right direction.

Look The Part

You do not have to be ‘dressed to kill’, nor do you have to wear designer clothes and look like you’ve just stepped out of Vogue magazine. You do, however, need to be dressed appropriately.

The importance of clean, fresh clothes and polished shoes may seem obvious, but can sometimes be overlooked. As my dear, old Dad used to say: “There’s no shame in being poor – just don’t look it”.

Little things get noticed and can send out messages:

- They haven’t taken much trouble in coming to see me
- I can’t be very important to them
- This person looks casual/sloppy, the company must be like that.

Show The Customer You Are Pleased To See Them

You can do this by:

- **Shaking hands**
A genuine, firm (yet not bone-crushing) handshake will do nicely. There is no need to go overboard, the customer will soon realise if you are not sincere. And don’t force the issue – some people feel uncomfortable about shaking hands, the key things to remember are, don’t give people a bone-crusher that brings tears to their eyes, but, do not hand them a ‘dead fish’!!!
- **Smile**
No one likes doing business with someone who looks like they’ve been weened on a dill pickle! It is surprising how far a smile will get you. Smile as you shake hands and consciously use it from time-to-time as you talk. People react well to it and a genuine smile sends out a message of warmth and sincerity. A smile is contagious and usually prompts a smile from the other person.
- **Make eye contact**
If you look down at your feet or over the person’s shoulder, you will appear diffident, vague, unsure of yourself or even shifty – not what the customer wants. Looking the customer in the eye tells them that you are a positive person, ready to take things on and face up to issues. However, don’t overdo the eye contact to the point where the person feels intimidated.
- **Be aware of non-verbal signals**
The way we sit or move can demonstrate attention, interest, concern or the opposite of all of these. In the use of so-called ‘body language’, it is usually best to sit, or standing in an open, receptive fashion with uncrossed arms, leaning forward slightly to show interest. Taking up a position similar to the person you are talking to (mirror-imaging) tends to put them at ease.

Think Before You Speak

You cannot plan a whole conversation in advance, but some things you can plan for include:

- ◆ A sincere greeting in your opening remarks matches the handshake and the eye contact
 - Use the person's name early in the conversation and then from time-to-time, but use the surname only until you are given permission or you are certain that it is acceptable to be on first name terms. If you have difficulty remembering people's names, the *Put Yourself in the Customer's Shoes* workshop addresses this issue with a number of great tips and hints.
- ◆ Get the customer talking by asking both 'open' and 'closed' questions, and we practice these during the workshop.
- ◆ Summarise regularly to ensure you have understood and to show the customer you are listening
- ◆ Be encouraging by using phrases such as 'I see, please go on' or 'Tell me about ...' or 'and what else?' and nodding occasionally in understanding.

Be Enthusiastic

We want to help the customer and we want the customer's business. Enthusiasm makes things possible. Enthusiasm is contagious.

I was very flattered and extremely pleased when, some 20 years ago, a client dubbed me the Chief Dispenser of Enthusiasm because the word 'enthusiasm' comes from the Greek: 'en theos' meaning: 'God's spirit within', which tells me that people are drawn to people exhibiting enthusiasm...it's integral to the law of attraction. It shows the customer that what they want done is worthwhile and that it will be handled by someone who cares and wants to make a success of it.

Customer Contact

Not all of us meet customers face-to-face, though the points on first impressions apply to anyone you are meeting. However, there are at least two other occasions when we come into contact with the customer – on the telephone and in writing.

The Telephone

Nothing is more frustrating than hearing a telephone ring again and again with no reply, or starting a conversation on the phone only to be left holding on. You have probably experienced this yourself, so imagine what it is like for customers trying to contact us.

Whilst recognising that it is not easy to answer promptly when other things are happening, there are steps that can be taken to ensure that callers are glad they rang us:

- answer within three, or at the most, four rings
- greet and identify your company and yourself then ask: "How may I help you?" When you give your name, e.g., "Good morning, Streetwise Innovation, this is Ross, how may I help you?" DO NOT SAY: "This is Ross speaking."
They can hear you speaking, it is superfluous and, instead of your name, the last word they hear is "speaking".
- maintain a consistent tone while using voice modulation and smile as you speak – the caller will perceive it
- ask for the caller's name and then, remember it and use it
- if they are to be transferred, tell the caller: "The number is ringing for you" or, "The number is engaged, would you like to hold?"
- if the caller decides to hold, update them every 20 seconds. Even if you have an 'On Hold Message' informing callers about your company's products and services, which every organisation should have, don't leave the caller in limbo for any more than 20 seconds
- when the extension is free, say: "I'm sorry to have kept you waiting, I'll put you through now."

The extension should also be answered within 3 or 4 rings. If a telephone is ringing, we all have a responsibility to ensure it is answered. There is nothing worse for a customer than thinking they have been put through, only to suffer yet another long wait. Should the person the caller wants be unavailable, whoever answers should say so and inquire if anyone else can assist.

If not, an accurate message should be taken showing the date and time of the call, who took the call, the caller's name spelt correctly and their telephone number read back to them for verification. If the caller is prepared to provide it, take a brief message about what they wish to discuss, however, be extremely tactful in this area and there should be a company policy regarding asking this question. Be sure to pass the message on *immediately*.

You will create the right impression with the customer if you take control of the call.

The best way to do this is by:

- asking questions
- discussing with the caller what you are going to do
- ensuring they understand and agree with the course of action to be taken
- once you have agreed to do something, make sure it gets done.

Not all calls are incoming. When you ring out, there are simple actions you can take to make them more effective:

- be prepared by making a note of the points you wish to raise and have all the information you might need at your fingertips
- use the other person's name
- smile
- block out a special time of the day to make calls – this has the added advantage of employing good time management.

In Writing

Many of our dealings with customers and each other is through the written word. There is a tendency for everyone to think that their writing style is the best. It tends to come naturally after a while and so we no longer pay a great deal of attention to our style of writing.

Clearly, any information given has to be technically correct but the impact on the reader will often determine how that information is received.

In any letter, email, text message, or report, we must think of the reader first. They are busy and want to be able to read as quickly and as simply as the material will allow.

Keep the following points in mind:

- Objective
Do you need to write or would a telephone call or a personal visit be better? If writing is the answer, who is the audience? What do you want the letter, email, text message, or report to achieve – what is its objective?
- Order
Give it a structure. If it is long enough to warrant an executive summary and recommendations, put them at the beginning, in case the reader goes no further. Otherwise, be logical. Ensure there is a beginning, a middle and an end to the letter. Show the order clearly, using headings and sub-headings. Make it easy to follow.

Do not try to impress by the use of long and complicated words. Avoid jargon and clichés.

- Sentences
Keep them short. One idea – one sentence. If you exceed 20 – 25 words, it is hard for the reader to take it all in.
- Paragraphs
Again, brevity is essential. Limit each one to 6 – 8 lines. Try to keep one theme to each paragraph. If necessary, use sub-headings.
- End where you began
Think of the reader again. Will what you have written achieve your objective? It may take a little longer to write but it will repay you with a customer who realises the trouble you have taken and who will think you are worth doing business with again.

Receiving The Customer

One further opportunity for customer contact comes if the customer decides to visit us. Here again, there are simple guidelines which, if followed, contribute to the customer's view of visiting a company or organisation that cares about them.

It does not take much effort on our part to show that we are going to some trouble on their behalf:

- make sure there are clear signs showing exactly where the office is
- allow car spaces for visitor parking
- make sure the reception area is comfortable and tidy
- current material on the company should be available for browsing
- reception staff should be smart in appearance – you may even consider a corporate wardrobe
- staff should be friendly and efficient so that visitors feel welcome immediately
- staff should keep the customer regularly informed of any delays and, if possible, provide a reason for the delay and an apology.

So many impressions are created in the reception area. It is the 'shop window' of the company and we want to make sure the customer is happy to come in and do business with us.

The next step is to ensure the customer gets safely to the person they are there to see. If possible, a secretary should collect and accompany the customer. If not, the team member being visited should go to meet them.

Assuming the secretary is collecting the customer, they should:

- introduce him/herself
- use the customer's name
- chat about general topics – the weather is always a safe one – on the way to the team member's office, meeting room or department
- announce the visitor on arrival
- offer tea, coffee or a glass of water.

Once at the appropriate office, observing the common courtesies is all that is needed:

- smile and acknowledge the customer as soon as they enter
- stand up and shake hands
- use the customer's name
- refer to any previous meeting, particularly any social or personal matters that were raised – people like to know you are interested enough to remember
- keep your desk clear and tidy – this could be a good reason to use a meeting room
- ensure you have any relevant files or papers to hand
- when finished, accompany your visitor back to the main entrance.

Please note: these principles and practices apply, with equal importance, to suppliers visiting our premises as they do to customers. Everyone is a potential customer or knows someone who is.

All of this is essentially common sense and simple politeness. For a company that wants to demonstrate to its customers that it really cares about them, the trick is to make sure that common sense is ***always*** common practice.

Developing The Relationship

Our aim is to develop and build up a long-term relationship with our customers. Everything we do should contribute to that. Getting all the little things right makes a big difference. No matter who we are or what we do, keeping in mind that it is the customer who counts will, at the end of the day, distinguish us from the rest.

Nevertheless, some people are in a position where it is easier to market and sell services than others. While it is not the purpose of this whitepaper to rehearse sales techniques (the sales training program and the book, *Sales Aerobics* is devoted to that), it is worth having a framework in mind. This can be of assistance when a selling opportunity presents itself.

You know from your own experience what makes you buy from one person rather than another. How the selling is done makes such a difference. This is particularly true of a professional service where, as much as anything, you are selling the benefits of a long-term relationship.

In our world, selling necessitates us playing at least three interrelated roles – consultant, problem-solver and professional partner.

Consultant

The customer wants advice. Sometimes that advice may mean not making a sale. It is still worth giving because it builds trust – a primary aim. Once the customer knows you give impartial advice, they are much more willing to come back.

Problem-Solver

We are looking at issues that might be of great concern to the customer. We need to interpret the problem correctly, involve the customer in the solution and make it a joint venture.

Professional Partner

Our aim should be to create an alliance. It is in our interest as well as the customer's, to develop the relationship into a professional partnership. This involves winning the customer's trust, earning your credibility as a consultant, proving yourself as a problem-solver and then looking for further ways to nurture the partnership.

Building trust and developing the relationship will create opportunities. Nevertheless, they will not always simply come to you. You will have to search for and grasp these opportunities. The Chinese militarist, Sun Tzu, in *The Art of War* says: "Opportunities multiply as they are seized."

Know your services, their quality and range. Product knowledge is essential for credibility. If your range is considerable, there is almost certainly a specialist who can help the customer with a particular problem.

Outline the need with the customer by asking open-ended questions that will get the customer talking and agree on the need together.

Demonstrate the benefits. Describing the services or products on offer is not sufficient. You need to **show** the customer *what* they will do **for them**, their business, their family, etc., and how the solution will benefit *them*.

Deal with any objections. Customers can have underlying anxieties and you may have to dig a little to see if these are real or imaginary. If they are the latter, they can usually be talked out fairly quickly. If they are genuine, then it is worth taking the time and trouble to deal with them at an early stage. It may fester and continue to cause problems if you don't get it sorted out as early as possible.

Close the sale. Ask for the business. Those of us who sell experience or expertise sometimes have difficulty in bringing the customer or prospective customer to the point of making a decision. In some cases, this cannot be done in one meeting and here it is more a case of sowing seeds, listening, building trust and showing how we can satisfy the customer's needs. At some point though, and judging that point is vital, you need to close the sale if you are to get the business. You have to take this final step, otherwise, all the previous good work is lost.

Turning Complaints Into Opportunities

On odd occasions, you will receive a complaint. It happens sometimes even when you have done all the 'right' things. Nobody likes getting complaints but, handled well, they can be turned into an opportunity. There are certain guidelines you can follow:

- Take the complaint seriously
Even if it is not our fault, the customer perceives it that way and we need to deal with that perception.
- Listen
Empathise, but don't sympathise...put yourself in the customer's shoes where necessary, but make sure you understand the essence of the complaint.
- Ask questions
This gives you the initiative. You are in a better position to control the discussion.
- Summarise
Show the customer you have listened and understood by paraphrasing what they have told you. This provides them with the opportunity to correct any misunderstandings, or misconceptions.
- Keep it impersonal
Don't argue – you might win the argument but you lose the customer. Don't get annoyed – this only raises the temperature higher that it already is. Don't 'pass the buck' or feel that someone is attacking you personally. View the complaint as a challenge to be solved jointly.
- Decide on action
If you believe it to be your fault, explain what you will do about it – then do it! Make sure, however, that you do not promise things that you, or others, cannot deliver.

If it is not your fault, but you can help in some way, then that too is well worth doing. It shows you are partners, always ready to lend a hand.

If it is not your fault and you must stick to that, then you can still be empathetic, explain your position, offer advice on how to prevent the problem recurring and exhibit genuine concern that the customer has a problem.

Always try to do something if you can. Make sure the customer knows you are trying and keep them informed. Complaints handled well cement and build a relationship.

Even if you can't sort out every complaint, the customer will appreciate you trying. They will appreciate it even more if you succeed in working things out to their satisfaction. Either way, you will have made something positive out of a potentially damaging situation.

Be grateful for complaints. Research tells us that, for every complaint a business receives, there are 26 that they never hear about, and each of those 26 complainants will, typically tell 20 people, then the 'Chinese whispers' happen when some people will embellish the story, others will leave important facts out and by the time the 529th person has heard about it, the complaint has turned into a major catastrophe, even involving a possible fatality.

Does It Really Matter?

If you have read this far, we hope that you will agree that it ***does*** matter. Customer care is not something we choose to do if we feel like it. It has to be part of ***everything*** we do, at ***all times***. And it applies to each and everyone of us.

We may have different roles to play within a company. Some of us may be in more direct contact with customers than others, but we all, in some way, serve either external or internal 10customers and the opportunities are endless.

In Summary:

- We all belong to excellent companies with products and services of which we should be proud

- The more we can understand the needs of our customers and potential customers, the more opportunities we will find to serve them
- We have to understand our own attitudes and be positive about ourselves if we are to offer the standard of service our customers deserve
- Getting our own working relationships and our dealings with colleagues inside the company right is essential if our external customer service activities are to succeed
- Serving the customer means a *total* service.
This is reflected in how we receive and deal with telephone calls, with visitors, in how we write our letters, emails, text messages and reports and in how we manage the relationship over a period of time.
- We are *all* salespeople.

We all have a responsibility to identify opportunities to promote our organisation as the one to work with and, in some cases, perform a very direct service selling role, however, we recommend getting expert advice in how we do that when utilising social media, or any media for that matter.

The world does not owe us a living. It is the customer who pays our salaries and keeps our businesses ticking over. These may be clichés but they are still true.

Getting and keeping customers is essential for survival and growth.

Excellent service is the way to ensure that we retain our existing customers and win new ones.

It may be an ideal, but we should aim to make our service *perfect*. The word itself spells out the message we wish to convey to our customers:

Professional
Efficient
Reliable
Friendly
Expert
Caring
Trustworthy

Let's try for perfection. Let us all keep the customer at the front of our mind. Let us ensure that *our* company is recognised as *the* company where the customer really *does* come first!