

2015

# DAS Customer Service 101

## *Learner's Guide*

The 2015 DAS Customer Service Training is a 90-minute, interactive refresher intended to bring heightened awareness, standards and consistency to our DAS customer service philosophy. Focused on the basics of good customer service, this course presents proven techniques for creating positive customer experiences. Geared toward anyone who has one or more customers, you will leave with skills that can be used in all areas of life. Learn simple, yet powerful tips for communicating effectively and making our DAS customers feel valued.

**OhioDAS**  
Service · Support · Solutions

# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide



*What are your learning objectives?*

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*Our DAS Mission, competency and strategies:*

**DAS Mission**

To provide quality service, specialized support and innovative solutions for the effective operation of Ohio government.

Ohio **DAS**

**Statewide Competency: Customer Focus**

Focuses on the customer, whether internal or external, by understanding the needs of the customer and responding in a timely fashion, responding to customer feedback, and seeking out help and information when needed.

Ohio **DAS**

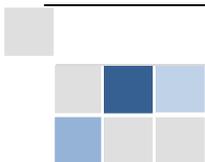
**Our DAS Strategies**

- Improve our customers' experiences
- Enhance our workplace environments
- Proactively and effectively communicate
- Align workforce performance and growth
- Make improvements that enhance services
- Strengthen standards for project success

Ohio **DAS**

DAS exists to serve our customer agencies. It's no accident that our mission of Service, Support and Solutions starts with Service. We provide centralized administrative services that are unavailable from any other agency, organization or entity. Since we are our customers' only choice, it is our responsibility to provide exceptional services and great customer experiences.

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# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

### Customer Service

We have all received customer service at one time or another. We have all experienced a variety of customer service experiences from exceptional to poor. But what is customer service? How do we define it and what makes it so important?



At DAS, we define customer service as the assistance and advice that we provide to the people who buy or use our products and services.

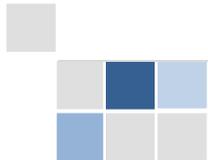
### Activity

**Step 1:** What does great customer service look like? On the left side of the table, list some great customer service attributes and behaviors.

**Step 2:** What does poor customer service look like? On the right side of the table, list some not-so-great customer service attributes and behaviors.



| <i><b>What is great customer service?</b></i> | <i><b>What is bad customer service?</b></i> |
|---|---|
| 1)  | 1)  |
| 2)  | 2)  |
| 3)  | 3)  |
| 4)  | 4)  |
| 5)  | 5)  |
| 6)  | 6)  |
| 7)  | 7)  |



# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

### Quick statistics

1. If you had a bad customer service experience, how many people do you tell? \_\_\_\_\_
2. A customer is \_\_\_\_\_ times more likely to defect to a competitor if the problem is service related rather than price or product related.
3. For every customer complaint, there is an average of \_\_\_\_\_ other unhappy customers who have remained silent.
4. 96% of unhappy customers don't complain and \_\_\_\_\_% of those will simply leave and never come back.
5. A dissatisfied customer will tell between \_\_\_\_\_ to \_\_\_\_\_ people about their bad experience. Around 13% of dissatisfied customers will tell more than 20 people.
6. Happy customers who get their issue resolved tell \_\_\_\_\_ to \_\_\_\_\_ people about their experience.
7. \_\_\_\_\_% of customers will pay more for better service.
8. It takes \_\_\_\_\_ good experiences to make up for one bad experience.
9. Each day, there are \_\_\_\_\_ million active users on Facebook.
10. Every minute, there are \_\_\_\_\_ tweets sent.



Have you seen bad customer service reported on social media? This means when people give or receive bad service, it spreads faster now than ever!

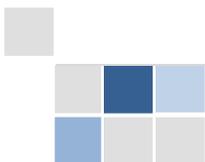
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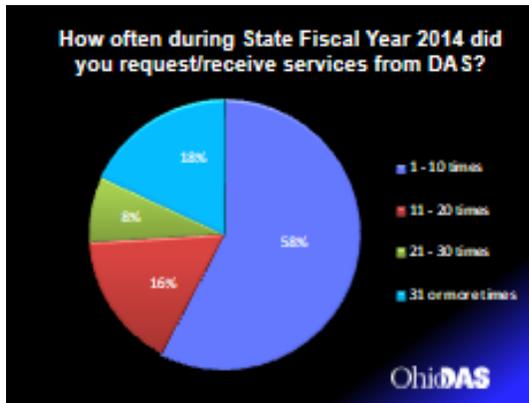
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# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

### *Every customer interaction is an opportunity.*



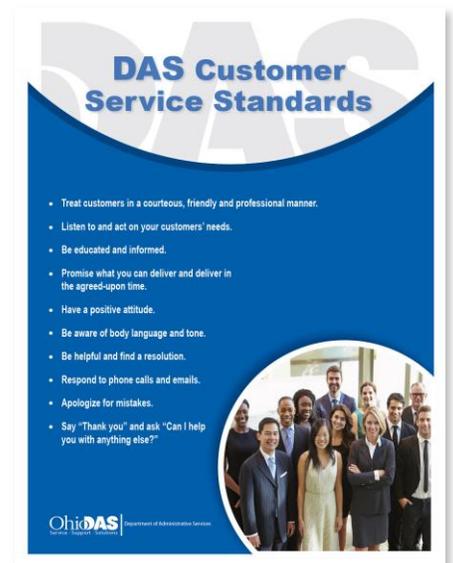
From our DAS External Customer Satisfaction Survey, we asked how often our customers used our services.

Every customer interaction is an opportunity.

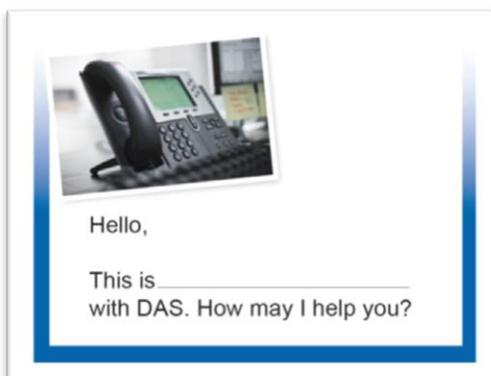
### *DAS Customer Service Standards.*

These are ten standards that we believe every DAS employee possesses. Let's be sure to practice and exhibit these standards while interacting with our customers.

Please display your poster in a visible area within your work space. Identify the top few standards that you'll adopt and strengthen to enrich your interactions with your customers. Once you've made those a habit, revisit the list of standards and pick a few more to adopt and strengthen. Repeat this until you're habitually performing all of the DAS Customer Service Standards as a normal part of your day.



### *How may I help you?*



A friendly, professional greeting when your customers call can set the right tone for a productive, positive conversation.

Use your poster as a reminder to answer the phone in this standard way. You can move the words around to best match your personal style - just be sure to include these same elements in your greeting.

## *Internal & External Customers*



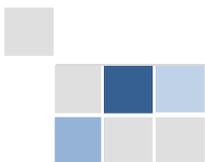
Everyone has both internal and external customers.

\_\_\_\_\_ customers are the people with whom we work in our offices, in our divisions and across DAS. We often provide and receive services from one another.

\_\_\_\_\_ customers are the people who receive and benefit from our services. They are agencies, boards, commissions and other public entities.

Think about some specifics in your job. Who are your internal and external customers? Write them down on the space provided.

| Internal Customers | External Customers |
|--------------------|--------------------|
|                    |                    |
|                    |                    |
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## Enhancing our Customer Service Skills and Standards

### Enhancing our customer service skills

- Pay attention.
- Listen.
- Ask good questions (use critical thinking).
- Provide information that the customer needs.
- Ensure information shared is clear and understood.
  
- Respect the customer.
- Navigate difficult conversations.
- Balance our regulatory role with our customer's needs.

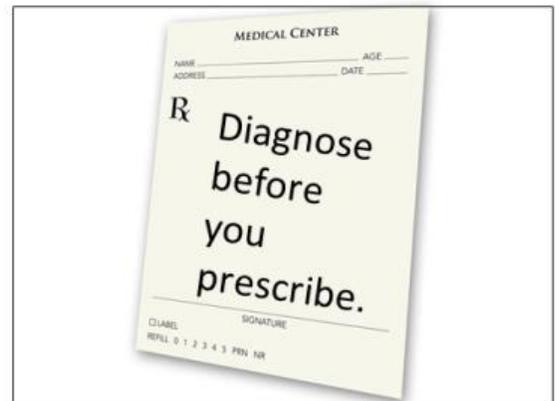
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Always diagnose, before you prescribe. Some of us have a tendency to jump right to solutions for the customer when they have a problem – because we know what we'd like done if we were in their situation. Remember that we are all different.



## Hearing vs. Listening

### Hearing vs. Listening

- Importance of understanding the difference between hearing and listening effectively:
  - Hearing is the reception of sound;
  - Listening is the attachment of meaning to the sound.
  - Hearing is passive;
  - Listening is active.
- Listening is the neglected communication skill.
- Unlike public speaking, few have formal instruction in listening.

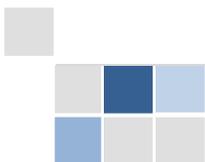
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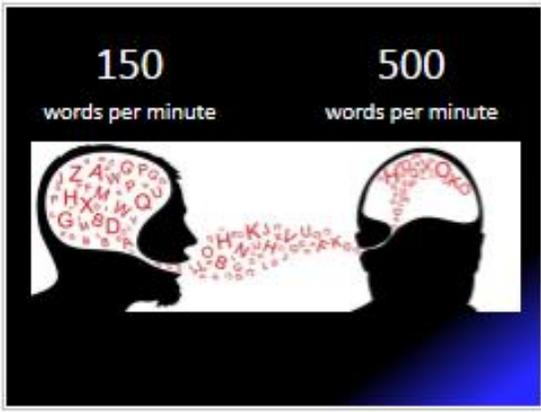
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DAS Customer Service 101  
Your Customer-Friendly Learner's Guide

**Strengthening our listening skills:**



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**Why good listening skills matter**

*It's a fact:*

- The average attention span for a U.S. adult is 8 seconds.



*Attention span of a goldfish: 9 seconds.*

**Why good listening skills matter**

*It's a fact:*

- Immediately after we hear someone speak:
  - We remember about 50% of what they have said.
  - A few hours later, we remember only about 10 to 20%.

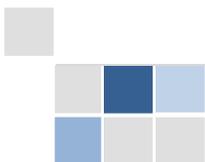
Ohio **DAS**

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# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

### Strengthening our listening skills:

Sharpening our listening skills is relatively easy to begin practicing since most of it is based on knowing what constitutes good listening and what doesn't. Remember: listening is not a passive process, so all of the techniques below are active, including the ones that are not visible to the speaker.

**1. Listen with an open mind:** Be ready to hear and consider all sides of an issue. This does not mean that we have to agree with what is being said, but rather that we must avoid defensiveness. Another way to think of it is to go into an interaction ready to consider new viewpoints and ideas. Every opinion and perspective we encounter while listening can be viewed as the hypothesis that we can examine and experiment upon. Our willingness to listen to a different perspective will sometimes yield surprising new insights for us.

**2. Show the speaker you're listening:** It is possible to listen without showing any external signs of it, but a stone-faced audience is rarely what anybody wants. Visibly and audibly demonstrating that we are listening—that we are engaged with and/or interested in what is being said—is just as important as the listening itself. The key is to provide appropriate feedback. As an added bonus, it helps the speaker to adjust his/her message to make it clearer and more interesting. Here are some of the things we can do to confirm to others that we are listening: Head nod, leaning forward, maintaining eye contact, taking notes when appropriate, verbal affirmation. In contrast, there are many things that we do, deliberately or not, which imply to others that we're not listening: crossing our arms, fidgeting, multi-tasking, leaning away from the speaker, failing to make steady eye contact and failing to answer questions posed by the speaker.

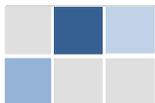
**3. Pay attention. Eliminate or overcome distractions:** It takes very little to take our attention away from the work of listening. We start out in life as good listeners. Think about how much a baby learns within the first few years of his or her life. Yet babies don't attend classes, read textbooks, or go to seminars. They simply listen, and they do it so well that eventually they start behaving like little adults. Over time, however, a series of bad habits begins to sprout up. When a teacher suddenly stopped in the middle of a lesson and asked students to explain the content of the lesson thus far, 90% of first grade students could do so successfully. That number drops to 80% in second graders, then plummets to 44% in middle school students, and to 28% in high school. In other words, despite how well we start, our bad listening habits develop quickly.

If we are to become better listeners, we must learn to recognize the obstacles we face. Examples include:

- External noises (beeping, humming, etc.)
- Psychological activity (worry, self-consciousness, preoccupation, etc.)
- Physical conditions (temperature, odors, lighting, visual distractions, etc.)
- Physiological conditions (pain, hunger, fatigue, etc.)
- Semantic distractions (dialects, accents, unfamiliar vocabulary, etc.)
- Technological distractions (the urge to check your phone, surf the net, etc.)

Being aware of what is distracting us at any given moment is half the battle. However, when we find ourselves in a situation where we cannot overcome the obstacle, there is nothing wrong with letting the speaker know and suggesting a solution, such as a change of setting or having the discussion at another time. Doing so communicates that we *want* to give our full attention. Being aware when we simply cannot focus and listen is important. It is okay to recognize limitations and the need for rest. It is also okay to admit when we have zoned-out or potentially misunderstood/misheard something.

**4. Listen without judging or refuting:** Suppress the urge to let biases prevent you from listening fully. We can only do one thing effectively at a time: listen, judge, or respond. Go in that order. You have to begin with listening to the entire message, then you can weigh your thoughts against what has been said, and finally respond. Allow each role to run its course in turn. When you are the listener, you cannot simultaneously be the judge. Our minds do not work in categories quite so neatly, but when we make this effort to suppress or postpone our desire to make premature judgments we become better listeners. If you judge and then speak too soon, you've opened the possibility of having missed a critical part of the message.



# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

**5. Remember that listening does not equal agreement:** One of our greatest obstacles to listening is the irrational fear that the speaker (or others) will perceive our listening as agreement. We should remember, however, that listening does *not* equal agreement. Listening does not force us to silence our own opinions, it just asks us to show respect to others. All that listening *actually* communicates is a willingness to communicate—and nothing more. Listening demands neither surrender nor agreement; instead, listening demands an open mind. Listening actually provides a powerful way to bring about change because listening allows you to think.

**6. Adapt to the speaker's appearance, personality, and delivery:** Don't allow a stereotype—either negative or positive—to influence your listening. Despite conventional wisdom against judging a book by its cover, we do so consciously and subconsciously every day. Accept that there are different personalities, styles, and levels of ability. Focus on the positive attributes that the speaker brings and accept the stylistic and delivery differences and assist where you can to provide a productive conversation.

**7. Be aware of verbal, para-verbal (tone) and non-verbal messages:** Paying attention to body language is just as important as paying attention to the words said (verbal) – and the tone in the speaker's voice (para-verbal). If you need proof of the importance of body language (non-verbal), just think about how much more difficult it is to detect something like sarcasm during a phone conversation or in a text message without the benefit of seeing the person's face and body. Without the ability to see another person's facial expression, hand gestures, and other movements, we lose tremendous portions of the communication. Don't overlook these messages when you have the benefit of its presence! How we interpret what is said:

- Verbal – words (what we say) – only 7% of the meaning is interpreted through the words we say
- Para-verbal – tone (how we say it) – 38% of the meaning is interpreted through our tone
- Non-verbal – our expressions and actions – 55% of the meaning is interpreted by our expressions and actions

### **8.a. Don't interrupt – resist “jumping in to talk”**

Pay attention for the “turn taking” signals that are normally a part of the ebb and flow of conversation. Suppressing the urge to voice our thoughts and opinions the moment they form makes us better listeners. At the root of this struggle we'll often find our ego: we believe what we have to say is more important than what they have to say. However, whether we intend it to or not these interruptions devalue their message, and it is often rude and offensive. It's not that we can't share what we have to say, but we must train ourselves to wait until the appropriate time to do so. While retraining ourselves, apologize when you realize that you interrupted; this acknowledgement reaffirms the other person's right to speak.

**8.b. Listen to silence:** Like body language, an absence of words can be just as pregnant with meaning as the words themselves. The tricky thing is that silence can imply almost anything. It could signal anger (which of us has not been on the receiving end of the “silent treatment?”), anxiety, fear, shyness, or contentment, to name a few. It could be something as simple as the need to think. Not to complicate the matter, but silence can also mean nothing—literally. And sometimes silence is just a pause; it is a moment of rest, and that's okay. Silence gives everyone a chance to rest and think. Try not to surrender to the urge to break silence—a little air in the conversation doesn't hurt. All of this should remind us of the importance of body language—listening is done with the eyes as much as it is with the ears. A person's body language will often give us the clues we need to interpret both words and the absence of words.

**9. Gather the concepts and central ideas you're hearing:** The best gauge to know whether you are listening or just hearing is whether or not you are actively looking for the central idea(s) of what is being said. We are the listener, and if the message is well-constructed then our role will be easier, but we will not always have that luxury. A great technique, regardless of the speaker's ability to construct a message, is to listen in such a way that you can summarize what you gleaned to be the central idea(s). What are the common threads – the ideas that seem to weave their way into everything being said? If the situation allows, you can then share your summary with the speaker and confirm (or revise) your understanding. Doing this builds your confidence as a listener, plus it proves to the speaker that you were listening.

### **10. Ask questions to clarify the message.**

This is a positive way to show someone that you are listening. The ability to ask questions is so important. Sometimes asking a good question is more important than receiving the answer.

# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

### ***Strengthening our listening skills:***

Techniques to show the speaker that you're listening:

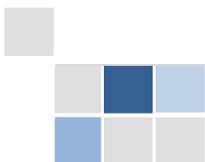
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8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

### ***Ask good questions***



Asking a good question (and listening to the answer) is valuable, irrespective of the answer. It communicates your respect for the other person.

*Use the sets of questions on the next pages when working with customers to clarify your understanding, examine reasons and assumptions, understand viewpoints, realize consequences and further assess by asking questions about questions.*



# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

### Ask good questions - examples

#### Clarifying:

These are "basic" questions that help us comprehend meaning

- Can you help me understand what you mean by \_\_\_\_\_?
- What is the main point of \_\_\_\_\_?
- How does \_\_\_\_\_ relate to \_\_\_\_\_?
- Do you mean \_\_\_\_\_ or \_\_\_\_\_?
- Could you give me an example of \_\_\_\_\_?
- Would \_\_\_\_\_ be an example of \_\_\_\_\_?
- Why does he/she say that?

#### Questions that Examine Reasons and Evidence:

These are more complex questions that target why certain things are said or done.

- How do you know \_\_\_\_\_?
- Why do you think \_\_\_\_\_ is true?
- Is there any evidence for \_\_\_\_\_?
- Is there any evidence that \_\_\_\_\_?
- What difference does \_\_\_\_\_ make?
- What are his/her reasons for saying \_\_\_\_\_?
- Are the reasons for \_\_\_\_\_ adequate?
- What led him/her to believe \_\_\_\_\_?
- How does \_\_\_\_\_ apply to \_\_\_\_\_?
- Can someone else give evidence to support the view that \_\_\_\_\_?

#### Questions that Examine Assumptions

These are more complex questions that target what is being *implied* (things *not* being said directly).

- What is he/she assuming?
- All of his/her reasoning depends on the idea that \_\_\_\_\_. Why is his/her reasoning based on \_\_\_\_\_ instead of \_\_\_\_\_?
- He/she seems to assume that \_\_\_\_\_. What is the reasoning for that assumption?
- Why would someone make that assumption?

#### Questions about Viewpoints and Perspectives

These are more complex questions that target worldviews and beliefs.

- What does \_\_\_\_\_ imply?
- When he/she says \_\_\_\_\_, is he/she implying \_\_\_\_\_?
- If \_\_\_\_\_ happened, what else would happen as a result? Why?
- What effect would \_\_\_\_\_ have on \_\_\_\_\_?
- If \_\_\_\_\_ and \_\_\_\_\_ are true, then what might also be true?
- If we say that \_\_\_\_\_ is right, then would \_\_\_\_\_ be right too?
- How might \_\_\_\_\_ respond to this issue?
- How would you answer the objection that \_\_\_\_\_ would make?
- How are \_\_\_\_\_'s and \_\_\_\_\_'s ideas alike? How are they different?

# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

### Ask good questions – examples, continued

#### Questions that Examine Implications and Consequences

*These are more complex questions that target cause and effect relationships.*

- What effect would \_\_\_\_\_ have?
- Could \_\_\_\_\_ really happen?
- Is there an alternative to \_\_\_\_\_?
- If \_\_\_\_\_ happened, what else would happen as a result? Why?
- When is \_\_\_\_\_ too much?

#### Questions about Questions

*These are questions that allow us to evaluate the questions that we ask.*

- Can we break this question down at all?
- Is this question clear? Do we understand it?
- Does this question ask us to evaluate something? What?
- Do we all agree that \_\_\_\_\_ is the heart of the question?
- To answer this question, what other questions must be answered first?
- Does this question lead to other important issues and questions?

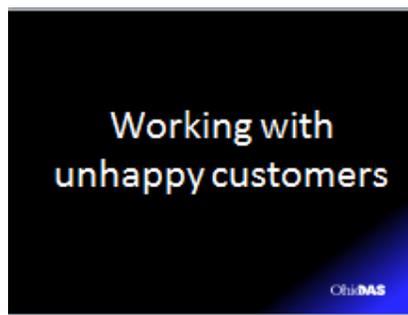
### Are they hearing you correctly?

The speaker has the responsibility for transmission and reception of the communication.

- Customers don't always know what to ask for.
- They don't ask because they don't want to feel silly.
- Help by asking questions.
- Check for understanding.



## Working with unhappy customers



# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

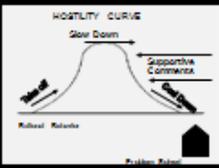
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### Unhappy Customers



The graph shows a bell-shaped curve representing hostility. The y-axis is labeled 'Hostility' and the x-axis is labeled 'Time'. The curve starts at a low point, rises to a peak, and then falls. A vertical line marks the start of the 'Hostility Curve'. A horizontal line at the peak is labeled 'Slow Down'. A horizontal line at the end of the curve is labeled 'Supportive Comments'. The name 'Michael Roberts' is written at the bottom left of the graph.

Wait until their hostility peaks and then begins to cool.

### Things you can do!



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graph TD; A((1. Take time, breathe, think and respond wisely)) --> B((2. Identify, assess the situation & the desired outcome.)); B --> C((3. Watch your tone and monitor your body language.)); C --> D((4. Be part of their solution.)); D --> E((5. Don't take it personal.)); E --> A;
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How do you navigate difficult conversations?

How do you maintain control?

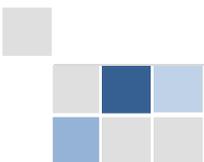
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## Navigating difficult conversations

### Stay calm

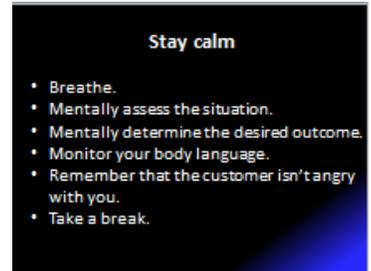
**Mentally assess the situation and determine the desired outcome.** While the customer may be unhappy, you are not. You can see past the customer's anger to see an optimal end state – and where you want to land with this customer.

**Monitor your body language.** Stay aware of the image you're projecting. Show that you're listening and avoid defensive body language.

**Remember, the customer isn't angry with you.** Again, as a professional, recognize that customers may have legitimate concerns buried somewhere in their anger and venting. Remain objective, assess the problem, and focus on solutions.

**Take a break.** If you allow yourself to be drawn into the argument, excuse yourself briefly (or put the caller on hold), count to 10, or get a drink of water. Allow yourself a minute or two to regain your composure.

**Breathe.** Practice the Square Breathing Technique. Breathe in for 5 seconds. Hold for 5 seconds. Exhale over 5 seconds. Hold for 5 seconds. Repeat 2-3 times.



### Maintain respect and respond professionally

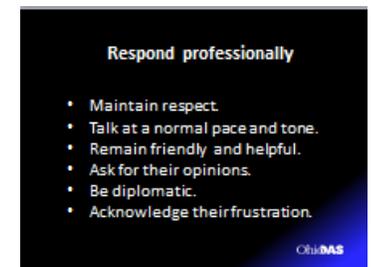
**Talk at a normal pace and tone.** If you begin to talk quickly or loudly, it will only make matters worse.

**Maintain a friendly manner.** Show the customer respect, even in the face of disrespect. Demonstrate no reaction in the face of difficult behavior. Whenever possible, use the customer's name to personalize the conversation.

**Ask for their opinions.** Show the customer respect by seeking his/her opinion and supporting a collegial feeling in the conversation. Balancing the control of the conversation can avert an argument which occurs when a customer feels that his/her control has been lost.

**Be diplomatic.** Diplomacy skills involve an understanding of other people and being sensitive to their opinions, beliefs, ideas, thoughts and feelings and responding in a way as to avoid bad feelings or awkwardness yet also asserting or reflecting your own ideas and feelings. *Example: Clearly, we've upset you. Getting to the bottom of this is just as important to our agency as it is to you.*

**Acknowledge their frustration:** *Examples: It is irritating when people don't immediately get the help that they need. It's very annoying to experience a delay in service response. Nothing is more distressing than feeling like you're being passed around when all you want is help.*



### Empathize or apologize

In all situations, feelings must be acknowledged and addressed in order to focus on the problem. Listening, empathizing and/or apologizing helps the customer hear that you care, shows that you can relate, diffuses anger and allows you to build a bridge of rapport to re-establish trust.

Acknowledging through empathy or apology must be sincere yet carefully worded.

*Examples: That must have been very frustrating for you. I realize the wait you encountered was an inconvenience. If I was in your shoes, I am sure that I would feel exactly the same way. It must have been very frustrating for you to wait five days for our service and for that I'm sorry. Please accept my apology for ...*

**LISTEN** (covered earlier). Use the skills that are best for the situation.

**ASK GOOD QUESTIONS** (covered earlier). Use the questions that are best for this situation.

**Be part of their solution:** This can help the customer realize that you aren't the source of his problem. *Examples: We will get to the bottom of this. We have to work within our boundaries – but together, we can get you closer to an answer.*

**Show your appreciation for the feedback provided:** Many customers stay silent so appreciate when customers come forward to voice their concerns. View such feedback as positive. *Examples: Thanks for taking the time to let us know how you feel. Thanks for being so honest. We appreciate customers who let us know when things aren't right.*



# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

### Customer service recovery



Every unhappy customer contact gives you an opportunity to forge a lasting positive relationship. A customer's sense of trust and camaraderie increases after a problem is successfully resolved, compared to if he/she had never had the problem in the first place. This makes sense, since you now have a shared experience: You have solved something by working closely together and rapport has been built.

Whenever possible, try to give your customer even *more* than they asked for. By delivering even the smallest amount above their expectations, you can make them feel like they are your most valued customer.

### Responding in a regulatory environment



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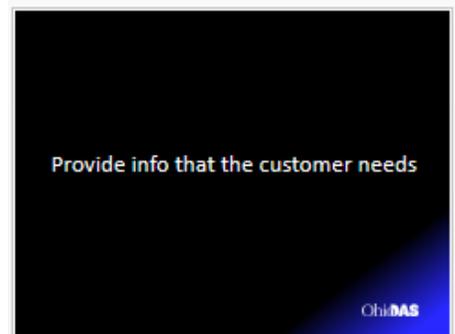
### Use critical thinking skills to help the customer

Use your critical thinking skills to provide info that the customer needs. Ask yourself:

- What does the customer need to know?
- Have I put myself in their shoes?
- Have I considered their unique needs?
- Do I understand that agency's objectives and how I can help?
- Have I considered their risks?
- Have we told them what they need to know?
- Are their responses indicating that they understand what I'm saying?

From there,

- Ask simple questions to gather more information.
- Share what you know.
- If you don't know – track down the answer or determine who has the answer.
- If the answer isn't complicated – share it yourself.
- If the answer is more complex – call back to share the basics – and then ask your source to follow-up to provide the complex details.



# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

### Responding to regulatory issues

Supporting and advocating the benefit of your program and its laws, rules and policies, is an important part of your job. Periodically, take time to refresh your understanding of your program's authority and supporting sources to enrich your ability to assist your customers when they have a regulatory question. Use these additional tips to navigate customer conversations to a satisfactory result:

**Know your area of business:** It's important to know your area of business – including the laws, rules and policies. Take time to listen to the conversations going on around you – and listen for the words that your divisions' leaders use. You can mirror these same words when talking with your customers to raise awareness of the purpose and benefits of your program, to engage your customers and when needed, to resolve their concerns.

**Listen** (see pp. 8-9). Use the skills that are best for the situation.

**Ask good questions** (see pp. 11-12). Ask questions that advance the conversation and your understanding.

**State the problem factually:** Avoid emotion and present the facts of the problem or situation.

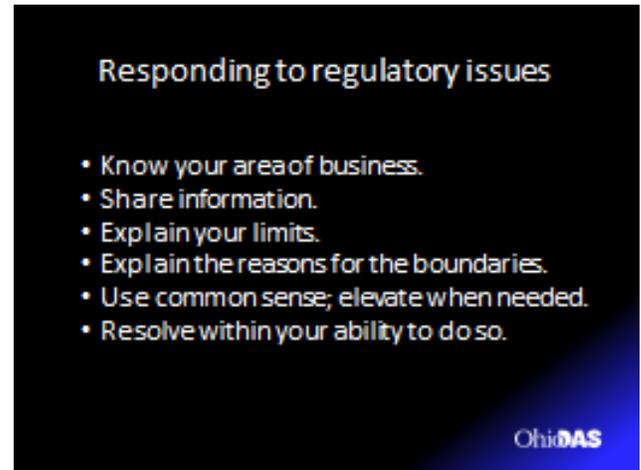
**Set your limits:** Let the other person know what you're able to do. *Example: Here's what I'm able to do. I can...*

#### Explain the reasons for the boundaries:

- **It is the law – and here's why:** Most customers should be comfortable with the reason. If further clarification is needed, determine if you can assist the caller. When needed, check in with your supervisor to confirm your understanding and then respond to your customer. Refer complex questions to your supervisor and/or to the Office of Legal Services.
- **It's a DAS policy – and let me explain why it's important:** Take time to read policies and instructions that support your programs so that you can help the customer understand the purpose and benefit of the policy. Listen and ask questions if the customer's perspective differs from your interpretation of the policy. Elevate to your supervisor for clarification, if needed.
- **There's going to be a delay – and here's why:** Apologize, explain the situation, give the completion date/time and ask if that date will work for the customer. Take ownership and ensure completion is achieved by the promised date.
- **Rework – and here's why:** If a document or form is unacceptable and returned to the customer, take time to explain the reasons for the rework to the customer. Address all issues that you see so that all remedies can be made. Also, take corrective action if the same error could be easily repeated by future customers.
- **It just can't be done – and here's why:** Sometimes a customer wants something that just can't be done. Your goal should be to educate the customer on why we can't complete the request.
- **Say "no" - and give other options:** Often what the customer wants isn't far beyond what you're able to provide. At DAS, we've seen it all – so it's likely there is a viable alternative to your customer's need. Sometimes it may be obvious, while other times you may require a creative approach or a team's consideration. So really listen and use common-sense to identify other options. Even if the customer chooses to not use your option, they'll appreciate that you tried. *Example: I'm sorry that we can't do X but I'm sure that we can work with you to find other alternatives.*

**Resolve within your ability to do so.** Where possible, reach a satisfactory outcome for your customer. If you're worried that you're stepping outside of your comfort zone – talk with your managers or co-workers – to share your situation and proposed solution.

**Use common sense – and elevate when needed:** There are times when something doesn't sound right. When that happens, ask good questions and listen with an open mind. Elevate such issues to your supervisor and/or ask your supervisor if your proposed response or solution is acceptable. Apologize, on behalf of DAS, for any mistakes you uncover.



# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide

### Make these three points



When having a conversation about a difficult topic or a regulatory issue, express words that make these three points:

**I CARE.** The customer feels heard if you listen and empathize.

**I UNDERSTAND.** The customer knows you understand how they feel if you are attentive and patient and summarize what you're hearing from them.

**YOU CAN TRUST ME TO HELP YOU.** The customer is able to see (or hear) that you are genuine and are committed to assisting – even if you can't satisfy 100% of the request. To help the customer feel equally in control of the conversation, use permission phrases such as, *Would you be willing...? Would it be alright if...?*

### The Golden Rule of Customer Service



Everyone knows the Golden Rule: Do unto others as you would have them do unto you.

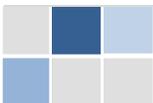
Do you know the modified Golden Rule for Customers? It is, Do unto others as they would have done unto them.

We tend to treat others the way that we'd like to be treated – when we actually need to treat others the way that they want to be treated. All people and all customers are different and want to be treated differently.

### Adding Value to our Products and Services

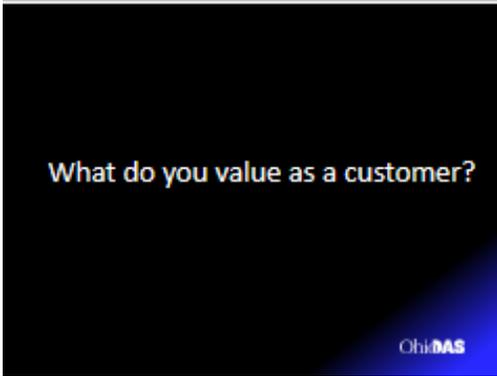


Value was the highest indicator of how our customers would also rate satisfaction. In the survey, “value” and our customers’ “overall satisfaction” levels were highly related. This means - if we want to our customers to be satisfied, we need to focus on our value. And this means – if we increase our value –our customers’ levels of overall satisfaction should also increase.



# DAS Customer Service 101

## Your Customer-Friendly Learner's Guide



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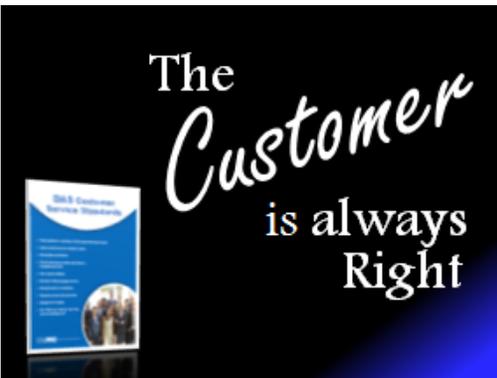
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