



Training Solutions Case Study #1

Background

A division of a manufacturing company that supports customers through follow-up technical consultation, upgrades, repairs, etc. had a goal of positioning their services as the top, globally, in its field. To do this, a customer service initiative was launched that would encompass every aspect of customer interface and support.

Goals

- To assist the employees in identifying customer service opportunities that will differentiate the company in the eyes of the customer
- To provide tools and options to address the difficult barriers to exceeding customer expectations
- To communicate company changes with employees in order to show support and to prepare them to interact with the customer more effectively

Approach

Needs assessment

- Clarification of customer service issues
- Background regarding company, product lines, and changes employees are facing
- Discussion of expectations
- Understanding of organizational chart
- Determination of goals
- Identification of training program's role in enhancing customer service excellence
- Overview of approach
- Identification of current measurements or monitors
- Workforce interviews (individual meetings with customer service reps from inside sales, call center, order entry, parts verification, pricing, etc.)
- Exploration of customer service approaches currently utilized
- Background regarding customer interfaces
- Identification of barriers, questions and issues regarding company changes
- Identification of best practice customer service behavioral habits

Program development

- Selection of customer service behaviors to be assessed
- Determination of customer service criteria
- Identification of customer service tools to be emphasized
- Preparation for leadership sponsor participation
- Development of program content, cases, exercises, activities and personal assessments based on real organizational setting scenarios for learning integration



- Development of post assessment to be used in follow-up session
- Selection of customer service monitors to be highlighted
- Completion of program based on feedback from leadership team members

Facilitation of program – Phase I

- Onsite presentation of program to all levels and departments of division
- Final meeting to overview process, observations and recommendations
- Development of Phase II of program for the following year to keep initiative alive, utilizing similar approach with new themes around managing change, in addition to delivering an optimal customer experience
- Delivery of Phase I and II to all sites of company to assure consistency and inclusion

Outcomes

Clarity of approaches and establishment of a common language to Customer Service Excellence behaviors

- Participants involved in identifying customer service behavior critical success factors
- Customer service competency analysis and comparison
- Real service examples and stories utilized to enhance training
- Specific models for addressing customer issues
- Participants engaged in sample customer complaint resolution scenarios for problems such as delivery lead time
- Participants offered suggestions on how to increase professionalism and utilize core customer service models and best practices

Identification of customer service process critical issues

- Brainstorming top customer complaints
- Acknowledging barriers to fulfilling customer service delivery
- Recognizing both individual and company accountabilities to address issues
- Response to issues and concerns validated two-way process

Show of support for individual and team concerns

- Encouragement of input and interaction within the group
- Networking and engagement between participants
- Openness to questions and answers
- Field personnel connected with factory and company