



## Off-the-Chart Customer Service™ System

### About the System

Off-the-Chart Customer Service Results™ is a comprehensive, modular suite of training resources designed to create seamless, world-class “customer-first” service organizations. Chart Learning Solutions delivers the processes, skills, and behaviors necessary to form a *consistently* high-performance culture so that your organization becomes your industry’s supplier of choice. It may be used as a stand-alone system, or as a resource to augment and extend existing internal resources.

Chart Learning Solutions offers a blended, systematic approach to creating the processes necessary for a world-class “customer first” culture through the following resources:

- a. One or two-day classroom delivery
- b. One-day Train-the-Trainer Chart Certification (optional)
- c. Off-the-Chart Customer Service Inventories and Action Planners
  - Service Cycle Management — 8 modules
  - Self-Management — 8 modules
- d. Off-the-Chart Customer Service Coaching Guides —16 modules
- e. Off-the-Chart Customer Service Managed Accountability Plans (MAPs)
- f. Half-day Management Training for administering MAPs
- g. Web-based delivery and administration

### Organizational Outcomes

Chart Learning Solutions offers maximum delivery flexibility to meet your needs, priorities, and time requirements. Organizations appropriately utilizing and installing the full complement of Chart service resources will experience:

- a. reduced customer complaints
- b. increased work efficiency and effectiveness
- c. increased sales, productivity, and profits
- d. reduced employee complaints/illness due to work-related stress
- e. reduced “down time” and bottlenecks
- f. increased discretionary sales time
- g. reduced employee turnover
- h. increased job satisfaction
- i. increased convenience in quickly bringing new hires up-to-speed
- j. increased convenience and effectiveness for employee retraining



## Off-the-Chart Customer Service™ System

### 10 Prerequisites for a World-Class “Service-First” Culture

*Does your organization have what it takes?*

<b><i>Problem/Issue</i></b>	<b><i>Solution</i></b>
Lack of adequate management support	Identify ROI, cost of ignoring escalating problems, current loss of business in \$
Escalating service issues and growing loss of revenue due to disenfranchised customers	Chart blended learning approach — classroom, web-based assessments, Managed Accountability Plans (MAPs) and Goal Action Planners (GAPs )
Lack of unified processes or systems; no common language	Chart’s unified process, customized MAPs and common language
Low or no employee accountability	Chart’s MAPs
Unclear individual goals	Chart’s MAPs and GAPs
Departmental goals at odds with organizational mission and vision	Chart’s MAPs and GAPs based on Inventory “gap” results
Unclear and unmeasured standards, expectations, or performance criteria	Chart’s training assessments, skill inventories, MAPs, GAPs
Measurements do not define quantity, quality, or specify time frames	Chart’s training, GAPs, TAP
Negative consequences of non-performance are nonexistent, vague, or inconsistent	Chart MAP/GAP meetings (identifying Top, Average, and Poor performers)
Rewards and recognitions are nonexistent, vague, inconsistent, or inappropriate to levels of performance	Chart MAP/GAP meetings
Desired behaviors and skills are not modeled by management, undeveloped managers	Chart Management/Leadership training
Learning is non-continuous with little or no process for real opportunities for constructive feedback	Chart’s coaching guides, four-stage process for continuous learning, GAP meetings



## Off-the-Chart Customer Service™ System

### How the System Works

Chart's modular construct allows maximum flexibility in delivery. Participants learn the step-by-step process of service cycle management from simple to complex service transactions, and from first impressions to follow-through. Participants also learn self-management skills such as product knowledge, time management, and dealing with difficult situations.

The initial rollout includes a one or two-day classroom training program designed to introduce a baseline of service knowledge. Classroom delivery provides vital communication and interactive skill practice, unachievable by reading a book, tele-broadcast, or interactive web-based learning.

You may use Chart Learning Solutions' classroom trainers for delivery, or your own organization's internal trainers after successful completion of Chart's train-the-trainer certification program.

Two service Inventories may be delivered as on-line pre-work to the classroom experience, or taken during the day of training on paper. If the inventories are assigned as pre-work, the results are used to address specific productivity gaps or priority needs of that particular training group.

Chart Customer Service Coaching Guides offer additional content and suggested activities to provide managers and supervisors training follow-through material for one-on-one or group coaching sessions. Results of the service Inventories and Goal Action Planners (GAPs) are used to create a customized approach for addressing not only departmental needs, but individuals as well.

Chart's customer service Managed Accountability Plans (MAPs) provide managers and learners modular, on-line activity-driven learning to further reinforce the material as well as hold learners accountable for applying critical services processes, behaviors, and attitudes within the workplace. MAPs are essential for realizing cultural change and enhance performance management.

Managers may participate in a half-day management training in order to effectively coach Learners.

Web-based e-learning provides on-line convenience for delivering training content, service Inventories, coaching, and MAP accountability plans for local and remotely managed employees.



## Customer Service Classroom Training Outline

### Off-the-Chart Customer Service Results™

Providing superior customer service today is not an option, it's expected. Find out how to turn prospects into advocates for life, based on Gallup Poll's 20-year research of over one billion customers. In this program, participants will learn how to go *beyond* one billion customers' expectations to *Off-the-Chart Customer Service Results*.

#### I. INTRODUCTION

- a. how to get unstuck and out of your customer comfort zone
- b. beyond the "Four Levels of Customer Expectations"

#### II. CUSTOMER SERVICE ESSENTIALS

- a. developing supportive attitudes for internal and external customers
- b. identifying your internal and external customers
- c. steps in caring for a customer: processes for handling customer requests
- d. communicating effectively with customers and avoiding misunderstanding
- e. how to create customer advocates who sing your praises
- f. service words that empower and words to avoid
- g. using best "customer partnering" attitudes and behaviors
- h. telephone etiquette: scripts and practice sessions
- i. time management and organization tips

#### III. COMMUNICATING THROUGH DIFFICULT SITUATIONS

- a. how to effectively deliver bad news
- b. solving customer problems: a four-stage model
- c. what to say when dealing with difficult and irate customers
- d. identifying and eliminating partnering obstacles
- e. resolving customer complaints — taking the H.E.A.T.
- f. providing effective feedback without creating hard feelings

#### IV. THE FOUR LEVELS OF CUSTOMER EXPECTATIONS

- a. communicating with accuracy
- b. communicating availability
- c. establishing partnering relationships
- d. how to give advice that leads to loyal advocates
- e. going beyond the four levels of expectations to Off-the-Chart Service



## Customer Service Training Outline (cont.)

### Off-the-Chart Customer Service Results™

#### V. EXCEEDING CUSTOMER EXPECTATIONS

- a. the six *F*s for exceeding the four levels of customer expectations
- b. role plays, case studies, and practice sessions
- c. video feedback

#### VI. TIME MANAGEMENT

- a. 36 time-tools for delivering exceptional, on-time service

#### VII. ACTIVE LISTENING SKILLS

- a. active and empathic listening defined
- b. when and how to use active listening
- c. what to do in emotionally charged situations
- d. how to help others clearly understand your message
- e. role-plays and listening exercises
- f. how to avoid common mistakes in active listening
- g. how to end bad listening habits
- h. behaviors of customer C.A.R.E.

#### VII. CONCLUSION

- a. paradigm shifts in meeting customer needs— creating win-win outcomes
- b. how to be a hero in the eyes of your customer

*One degree of effort in the right direction can make 180 degrees of difference.*  
— Lorna Riley

***Presented By:***  
**LORNA RILEY, CSP**  
**Certified Speaking Professional**

**A One or Two-Day Classroom Training**



## Off-the-Chart Customer Service™ Inventories

### About the Inventories

It's vital to periodically take stock of what skills are effective, and what needs to be developed, strengthened, or discontinued. True professionals stay at peak performance by constantly honing their skills so that they can best serve their customers' evolving needs. Chart's inventories are designed to pinpoint where organizational and behavioral changes are needed most, maximizing investments of valuable time and resources.

Chart Inventories assess 16 critical service skills, competencies and behaviors: 8 in Service Cycle Management, 8 in Self-Management. A total of 80 questions assess areas of service strength and opportunities for development, while organizing a strategic approach to improvement. They also help to eliminate bad habits, motivate behavior toward goals, create accountability, eliminate slumps, save management time, diagnose skill deficiencies, and develop peak performance.

Unlike traditional assessment "tests" measuring "right or wrong, good or bad," Chart inventories are a non-threatening way for participants to celebrate their strengths and develop action plans to maximize performance towards organizational objectives.

### Chart Inventory GAP Analysis

Chart Inventories have been created to give you two reports that measure gaps in performance. Inventories are essential in order to:

1. pinpoint 80 areas of customer service skill strengths and areas needing development
2. survey abilities, assets, and resources for customer service excellence
3. organize a strategic approach for service skill improvement based on real needs
4. eliminate ineffective habits and behaviors
5. save valuable time in managing performance—coaching to specific needed areas
6. motivate behavior towards measurable goals
7. diagnose skill deficiencies and gaps causing poor performance
8. provide a behavioral measurement tool for tracking performance
9. create customer service accountability
10. eliminate service slumps
11. develop peak service performance

Two Chart Service Results™ Inventories are available:

1. Service Cycle-Management
2. Service Self-Management

See next pages for Inventory indexes and content coverage.



## Service Cycle-Management Inventory

### Off-the-Chart Customer Service Cycle-Management™ Inventory

Today's top service professionals need regular skill assessment and feedback in order to work at world-class peak productivity and remain competitive. Chart's Service Cycle-Management Inventory not only assesses the eight critical areas of service cycle competency, but also the cycle sequence in which essential tasks take place in order to drive desired results. This 40-question tool diagnoses strengths and opportunities for development when coaching service performance.

#### STAGE 1: HOME

1. First Impressions
2. Building Rapport

#### STAGE 2: HELP

3. Questioning
4. Listening

#### STAGE 3: CHALLENGE

5. Problem Solving
6. Difficult Situations

#### STAGE 4: PRIZE

7. Follow-Through
8. Building Relationships

More detailed training modules are also available for each skill area listed above.

See the following pages for a detailed index of skills being assessed within each module.  
Approximate time for completion: 10 minutes on-line



# Service Cycle-Management Inventory

## Index of Inventory Skills and Behaviors

### 1. FIRST IMPRESSIONS

- Greeting/Introductions
- Customer Courtesy
- Professional Image/Clothing
- Word Choices
- Telephone Skills

### 5. PROBLEM SOLVING

- Being a Service Consultant
- Negotiating "Can Do" Solutions
- Customer Mistakes
- Problem Solving Step-by-Steps
- Resolving Spin-Off Problems

### 2. BUILDING RAPPORT

- Business Etiquette
- Instant Rapport
- Building Trust
- Confidence in any Situation
- Building Positive Relationships

### 6. DIFFICULT SITUATIONS

- Calming Upset/Irate Customers
- Difficult Customers
- Call Escalation
- Handling Complaints
- Delivering Bad News

### 3. QUESTIONING

- Information Gathering
- Pinpointing Needs
- Self-Service Questions
- Open-Ended Questions
- Controlling the Conversation

### 7. FOLLOW THROUGH

- Customer Feedback
- Thank-Yous
- Follow-Through
- Upselling/Upservicing
- Dealing with Buyer's Remorse

### 4. LISTENING

- Agenda Anxiety
- Reading Hidden Messages
- Speaking Customer Language
- Confirming Needs
- Maintaining Focus

### 8. BUILDING RELATIONSHIPS

- Remembering Customer Names
- Cultivating a Service Personality
- Staying in Touch
- Customer Appreciation
- Promoting Repeat Business



## Service Self-Management Inventory

### Off-the-Chart Customer Service Self-Management™ Inventory

Today's top service professionals need regular skill assessment and feedback in order to work at world-class peak productivity and remain competitive. Chart's personal Self-Management Inventory not only assesses the eight critical areas of personal service competency, but also reveals the sequence in which they take place in order to drive desired results. This is a 40-question self-scoring tool that diagnoses strengths and opportunities for improvement in coaching service performance.

#### STAGE 1: HOME

1. Product/Procedural Knowledge
2. Time Management

#### STAGE 2: HELP

3. Responsible Initiative
4. Utilizing Resources

#### STAGE 3: CHALLENGE

5. Service Attitude
6. Stress Management

#### STAGE 4: PRIZE

7. Continuous Improvement
8. Inner Wealth

More detailed Chart training modules are also available for each skill area listed above.

Approximate time for completion: 10 minutes on-line



# Service Self-Management Inventory

## Index of Inventory Skills and Behaviors

### 1. PRODUCT/PROCEDURAL KNOWLEDGE

- Product Knowledge
- Service Procedure Knowledge
- New Product/Service Releases
- Knowledge of Other Departments
- Service Standards and Expectations

### 5. SERVICE ATTITUDE

- Positive attitude
- Character/Integrity
- Service Mistakes
- Equal Respect
- Friendly Voice

### 2. TIME MANAGEMENT

- Effectiveness: Missions/Goals
- Efficiency: Organization/Paperwork
- Scheduling Smarts
- Finding Hidden Time
- Maximizing Productivity

### 6. STRESS MANAGEMENT

- Resiliency
- Multi-tasking
- Controlling Perspective
- Worry
- Remaining Actively Calm

### 3. RESPONSIBLE INITIATIVE

- Taking Initiative
- Creative Contributions
- Self-Motivation
- Personal Empowerment
- Decision-Making Flexibility

### 7. CONTINUOUS IMPROVEMENT

- Self-Reflection
- Customer Feedback and Evaluation
- Benchmarking
- Personal Investment
- Monitoring Progress

### 4. UTILIZING RESOURCES

- Locating Resources
- Lack of Resources
- Inbound Telephone Skills
- Outbound Telephone Skills
- Professional Contacts/Networking

### 8. REWARDS/RECOGNITION

- Rewarding Success
- Flow
- Life Balance
- Relaxation
- Gratitude



## Chart Learning Solutions' Managed Accountability Plans (MAPs)

### On-Line E-Learning MAPs

Chart's MAPs (Managed Accountability Plans) take classroom training from ideas to reality. MAPs will:

- a. accelerate the development of employees who are committed to the organization's mission, goals, and objectives
- b. quickly pin-point employees not committed to growth
- c. create learning accountability for achieving outcomes and objectives
- d. create a structure for the integration of existing training resources
- e. help managers, supervisors, coaches, and mentors develop employees more effectively and efficiently while still performing other duties
- f. increase learner retention of knowledge
- g. reduce the need for classroom training
- h. increase efficiency in the delivery of periodic training reviews

These benefits translate into quantifiable, bottom-line savings.

MAPs provide learning paths that empower employees to integrate vital skill fundamentals into their work life. This is accomplished by:

- a. organizing all appropriate subject matter into easily sequenced, user-friendly teaching guides for both the administrator and the participants
- b. clearly defined goals, standards and expectations through Goal Action Planners (GAPs)
- c. requiring participants to demonstrate and confirm their knowledge of the material at periodic intervals, as well as completing a final inventory assessment
- d. independent study, enabling participants to assimilate knowledge within work-place demands and schedules

Chart's coaching guides, MAPs, and GAPs are available in 16 modules, 8 in Service Cycle and 8 in Self-Management. See Chart Inventories for a listing of modules.