



## April 2014 Client Newsletter

Dear Judi,

Customer service excellence has always been, and always will be, one of your critical competitive advantages. Some key steps to ensuring that customer service excellence follow.

Judi

### Three Critical Steps to Ensure You've Got a Culture of Service

You've heard it before: You're really not in the *financial* services industry; you're in the *customer* service industry. At least that's how you and your employees should be thinking about what you do all day, every day. But, how do you really know what that means and, once you know, how can such a culture of service be sustained through the long-term, through employee change-over, and through inevitable changes in the industry?

1) First, take a look at the hallmarks of customer service culture from the point of view of the customer. What, indeed, does every customer or potential customer want from you? Over and over again, research in the area of customer service reveals the following distilled list of needs and wants:

- They want you to listen to them.
- They need common sense policies and procedures.
- They want every transaction to be completed quickly (and remember - their attention spans are getting shorter and shorter every day).
- They want to be treated like royalty - by everyone in your company.
- They only want products and services that are of the highest quality.

That's it. Five things. Seem easy? Maybe.

2) Second, you've got to take an honest inventory of your current stock in customer service. With those customer needs and wants in mind, ask yourself if your company can compete against every other company in those five areas. If you think so, try answering these questions:

- Do your employees have a thorough understanding of every product and service you offer? If so, do they explain them well to customers? Are employees empowered to solve all complaints?
- What training programs are in place to ensure employees understand everything?
- When was the last time you held an employee training program of any

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kind?

- Do you measure whether an employee's training actually shines through during interactions with customers?

3) If any of your answers to the above are clouded by uncertainty, it's probably time to take a thorough look at your company culture again, from your hiring practices to company policies. Experts suggest that refresher courses are needed every three to six months.

For any program to succeed there must be measurable goals and an opportunity to improve continuously. One bank has an employee performance measurement system in place that provides a "Service Culture Score" for each employee. Using data and the experiences gathered by mystery shoppers through Customer Perspectives, an employee is assigned a score and can earn bonuses based on certain measurements. The bank is committed to following through on every aspect of its customer service measures.

Take a moment to begin your self-analysis. You'll be that much closer to a true culture of customer service because of it.

**Judi Hess, President  
Customer Perspectives**

## How to Make a Great First Impression on Customers

People who feel welcome at your place of business are far more likely to return than those who don't. Beyond that, both satisfied and dissatisfied customers are bound to share their experiences with others, so you always want to strive for the former - and encourage word of mouth that will lead to long-term customers vs. drive them away.

Here are a few suggestions for leaving that all-important, positive first impression.

**1. Make sure everything looks nice.** Your customers' experience starts *before* they ever set foot inside your business. Maintain an uncluttered, easy-to-access parking area. Invest in a well-crafted sign. Keep the entire premises neat and clean, including the restrooms, which should always be in shipshape condition.

**2. Smile, even if you don't feel like it.** You may be having a lousy day, but when customers arrive, you *must* smile. This simple act instantly sets an upbeat tone. The same principle applies to customer interactions over the phone, during which you should "smile with your voice."

**3. Train employees to welcome customers.** Simply leading by example may not be enough. Explain to your employees why customer service should be their top priority at all times. Make it clear that their personal appearance and behavior need to reflect your high standards. Just like a messy store, poorly groomed employees can send customers the wrong message.

For complete article, [click here](#).

By Lee Polevoi  
Intuit Small Business Blog

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## Client Use of Mystery Shops

We use the data from the shops in various ways. We have built a recognition program around the shops to reward those who perform well and acknowledge their efforts amongst their peers. We have also built the shopping program into our quarterly incentive program because we believe that sales and service go hand in hand. Lastly, we use the data from the shops as an individual and group coaching tool. Each shop is discussed with the employee who was shopped to reinforce what they did well and review the areas they must improve on. Also, if we see trends where staff are not meeting all the standards, we remind the entire branch network of the behaviors that are required.

Jorge A. Santiago  
The Milford Bank

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## Upcoming Events:

The Merlien Institute's "**Market Research in the Mobile World North America**" conference on May 27-30 in Chicago. For more information, [click here](#).

The Marketing Research Association's **Insights and Strategies Conference** on June 4-6 in Chicago. For more information, [click here](#).

IIR's "**Shopper Insights in Action**" conference on July 14-16 in Chicago. For more information, [click here](#).

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Customer Perspectives | 213 West River Road | Hooksett | NH | 03106

