

Task 10:

Interacting effectively with customers

To complete this task you will look at the importance of your interpersonal and influencing skills in communicating with customers to meet their needs and expectations. Delivering excellent customer service is vital to the continued success of your organisation, and you will be involved in this aspect of the organisation's work whatever your particular role and responsibilities.

You will need to carry out research into body language and describe the impact of the Equality Act on your own communications and your organisation's communication procedures, and their importance. You will then describe a number of situations from your own working experience and complete three case studies.

When completing this task, you will:

- identify the differences between customer needs, wants and expectations
- explain the importance of balancing the needs of customers with the needs of the organisation
- explore open and closed questions as well as reinforcement techniques and explain, using examples, how and when you'd use them
- research active listening and body language and explain why they're so important in interacting with customers, and get feedback from a colleague on how well you interact with customers
- research and summarise your organisation's brand guidelines and communication procedures
- explain, using examples, why sharing good practice with colleagues is so important
- complete case studies explaining how you'd interact with customers who have legitimate complaints in order to resolve them effectively.

Key terms

Closed question – a simple question that can be responded to with a short answer, such as 'Yes' or 'No', or 'True' or 'False'. For example, 'Are you happy with the service you received?'

Open question – a question that cannot be answered with 'Yes' or 'No', or 'True' or 'False', but requires a fuller answer. For example, 'How did that make you feel?'

Rapport – a close relationship, usually one of mutual trust or understanding.

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Relation to the standards

In this task you will be looking at how you can build relationships with customers, regardless of whether you have a face-to-face or non-facing role. You will look at how the words you use, your tone and your body language all help build trust and rapport. Building a relationship with the customer is key to understanding and meeting their individual needs and expectations.

As part of this task you will be working towards demonstrating the following skills, knowledge or behaviour:

Knowledge:

By completing this task you should be working towards understanding the different needs and priorities of your customers and the best way to manage their expectations, knowing how to adapt your style to be highly effective.

Skills:

By completing this task you should demonstrate:

- a willingness and ability to engage with customers in a positive manner using relevant interpersonal skills
- the ability to work with customers to build a rapport, recognising and where possible meeting their needs and expectations
- a willingness to work with others and share ideas where appropriate.

If you have a **face-to-face** role you should also demonstrate:

- the ability to make initial customer contact and use appropriate verbal and non-verbal communication skills
- the ability to adapt tone, behaviour and body language when necessary, recognising and confirming understanding of customer needs and expectations
- the ability to recognise when to summarise, and the techniques to use.

If you have a **non-facing role** you should also demonstrate:

- the ability to make initial customer contact and make use of appropriate communication skills
- the ability to adapt tone and behaviour when necessary, recognising and confirming understanding of customer needs and expectations
- the ability to recognise and use reinforcement techniques during customer interactions.

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Behaviours:

By completing this task you should be working towards showing you can:

- demonstrate an ability to confidently approach customers, remaining positive and professional even when circumstances are challenging
- establish customer needs and expectations, working towards meeting them where possible, and explaining where necessary when they cannot be met
- demonstrate recognition of your own role, responsibilities, level of authority and organisational procedures when dealing with customers.

Distinction

As part of working towards **distinction** level, the Customer Service Practitioner standards require you to be able to:

- demonstrate your ability to adapt communication – tone, behaviour and language – to different customers and their interactions, showing clear knowledge of the application of the Equality Act in all customer handling
- demonstrate your ability to adapt interpersonal skills when meeting the needs and expectations of different customers, showing knowledge of the application of the Equality Act when communicating (verbally or non-verbally)
- demonstrate your ability to balance the needs and expectations of the customer with those of the organisation
- proactively work with others to ensure efficient customer service delivery
- demonstrate your ability to flex to various customer personalities, while remaining calm and in control where necessary. You will also need to demonstrate that you know the organisational procedures to be followed in all communication, and the importance to the brand/organisation of this requirement.



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Preparatory activities

1. Briefly explain what is meant by:

a) Customer wants

b) Customer needs

c) Customer expectations

What are the key differences between them?

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2. To identify your customer's needs, wants and expectations you will need to communicate with them clearly and use different questioning styles. Describe **at least three** situations in which you might use **open questions** with customers.

3. Describe **at least three** situations in which you might use **closed questions** with customers.

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4. Research the **five stages of active listening**, and describe what each one involves.

Stage	Description
1.	
2.	
3.	
4.	
5.	

Which stage of listening should you try to adopt when talking to customers, and why is it important to do so?



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5. Explain why the following reinforcement techniques are useful for confirming customer needs and understanding.

Reinforcement technique	Why it's useful
Summarising language	
Reiterating key points	
Clarifying questions	

6. Explain why it's important to balance the needs and expectations of a customer with those of the organisation.



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7. Research the importance of body language, and summarise why you need to adopt the right sort of body language when delivering customer service.

8. Describe how the Equality Act affects how you should communicate with customers.

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9. Get a copy of your organisation's brand guidelines, if one exists, and make a note of things you need to keep in mind. Keep a copy of the guidelines safe in case you need to refer to them at a later date.

10. Describe your organisation's communication procedures, tone of voice or house style for both written and verbal contact with customers. Can you see how these guidelines reflect your organisation's brand?

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11. Explain why following procedures in all communications is important to your organisation and its brand.

12. Explain why working together and sharing good practice is important in customer service.



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Knowledge application

Describe three **wants** commonly expressed by your customers.

1. _____
2. _____
3. _____

Describe three **needs** commonly expressed by your customers.

1. _____
2. _____
3. _____

Describe three **expectations** your customers commonly have of your customer service offer.

1. _____
2. _____
3. _____

Describe **at least two** situations, using specific examples (without mentioning any names), in which you have used active listening when talking to customers to establish their needs, wants or expectations.

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If you interact with customers **face to face**, ask a colleague to observe you serving a customer. Get them to feed back to you on how you communicated and built rapport, asking them to focus on your body language, tone and behaviour. Summarise the key points that they raised and how you plan to address them, below.

If your interaction with customers is **non-facing**, ask a colleague to listen in on a telephone call, or to proofread an email or letter you have written. Get them to feed back to you on how you communicated and built rapport, asking them to focus on your tone and choice of words. Summarise the key points that they raised and how you plan to address them, below.



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Provide a specific example for each of the following situations at work in which you have fulfilled the criteria listed. If there are criteria that you cannot think of specific examples for, keep them in mind when working and make a note of when you next fulfil them.

1. Used reinforcement or summarising techniques to understand a customer's needs, wants or expectations:
-

2. Adapted your style or method of communication to meet the specific needs of different customers:
-

3. Adapted to different customer personalities when dealing with a concern or complaint, while remaining calm and in control:
-



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Complete the following case studies.

Case study 1

You work for a company that employs an enthusiastic sales force to sell its products, and the initial sales reports are impressive. However, you soon get feedback that some customers are not satisfied with the products, claiming that the salespeople have made exaggerated claims about the product and created unrealistic customer expectations.

How would you have established the customers' needs and expectations?

Describe the actions you would take to build a rapport with the dissatisfied customers to ensure that their needs and expectations will be met:

How would you have explained the situation to the customers if their needs and expectations could not be met?

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How could you have used your own organisation's procedures to try to rescue the situation and avoid losing the customers?

Recognising your level of authority is important in customer service. In your current position and at your level of experience, would you be able to offer the solution you have outlined above, or would you need to get sign-off or refer the situation upwards?

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Case study 2

Mrs Darling has ordered a washing machine, which could only be delivered on Wednesday between 10am and 2pm. She agrees to wait at home, although she has to get back to work in time to attend an important meeting. At 2pm there is no delivery so she calls the supplier, and is told that 'the system is down and they can't reach the driver'. She is promised a return call within 5–10 minutes to provide an update.

Half an hour later, Mrs Darling still has not received an update call. She calls again and this time is told that the driver is behind schedule, and won't be available to deliver until after 4.45pm. Mrs Darling has to cancel her scheduled work meeting, inconveniencing a number of colleagues.

At 5.30pm the van arrives outside Mrs Darling's house. The driver and his colleague carry the washing machine into the house but manage to scratch the side of the machine. Mrs Darling says, 'Careful, you just scratched it!' but the driver simply replies, 'Don't worry, it's just a little scratch.'

On the way out they also manage to smash one of Mrs Darling's potted plants in the hallway, and don't acknowledge it.

How would you have established the customers' needs and expectations?

Describe the actions you would take to build a rapport with Mrs Darling to ensure that her needs and expectations will be met:

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How would you have explained the situation to Mrs Darling if her needs and expectations could not be met?

How could you have used your own organisation's procedures to try to rescue the situation and avoid losing the customer?

In your current position and at your level of experience, would you be able to offer the solution you have outlined above, or would you need to get sign-off or refer the situation upwards?

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The following case study has been left blank for you to write about one of your own experiences with a problematic customer.

Case study 3

Describe the situation you faced, or what the customer concern was:

What facts, needs and expectations did you need to establish, and how did you go about finding them out?

How do you think the customer felt?

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How did you respond in a way that built trust and rapport with the customer?

What actions and procedures did you take to rescue the situation and avoid losing the customer? Think about whether you were able to meet the customer's needs and expectations. If you were, explain what you did. If not, how did you explain to them that they could not be met?

How might you have handled the situation differently?

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Think about your experiences of working with your colleagues, and how you work together to deliver customer service. Give an example of when you have worked as a team, either by making a recommendation for improving your customer service offer, or by going the extra mile to meet a customer's needs.

Sometimes you may not be able to go the extra mile to meet a customer's needs because you will need to balance the customer's needs and expectations with those of your organisation.

Give an example of when you have been unable to meet a customer's needs because of your responsibilities to your organisation.

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Learner reflection

Complete the learner reflection detailing what you have learnt from carrying out the task, how you will make use of your learning in your work and which skills you still need to develop.

Learner reflection

Mentor/trainer/employer feedback

Learner signature:

Date:

Mentor/trainer/employer signature:

Date:



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