

GUIDE

# Customer Service Training Manual



# Customer Service Training is Vital

Ask any CEO of a company, president of a bank, manager of an office, or retail employee and they will tell you how important the customer is to their operations. Customers who receive excellent service greatly impact an organization's bottom line and future success. In fact, 81% of people are more likely to work with a business again after good service. And, the companies that prioritize the customer experience generate 60% higher profits than their competitors.

While many companies boast customer-centric mission statements, values, and priorities, they often lack a consistent and thorough training program that truly champions excellent customer service. The most successful organizations focus on customer service training that delivers consistent and ongoing knowledge and skills required to provide excellent service time and time again.

Lessonly exists to help customer service teams onboard new agents quickly, deliver continuous enablement, and enable teams to deliver truly exceptional service time and time again. That's why we created this customer service training manual.



## 81%

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## 60%

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This handbook provides tips, best practices, and do's and don'ts that will improve and codify your customer service practices for success.



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# #1 Three Key Elements



In order to develop a sound training program, companies must first address three fundamental elements of customer service with employees:

## A Definition of Service

How a business defines customer service shapes every customer interaction. Limited definitions of service that only focus on revenue growth miss the overall point of customer service. Instead, customer service definitions should provide a clear direction for every representative to address customer needs as much as possible and bring the vision of an amazing customer experience to life. After all, a happy customer will continue to be a buying—and returning—customer.

**A great definition of service is:**

- Easy to understand
- Customer-centric
- Authentic

## A Clear Understanding of the Customer

Customers, buyers, and clients want to feel valued and cared for. They also need someone to understand their needs and answer their questions. Therefore, great customer service starts with the ability to listen to the

customer and find out what they really need. Additionally, businesses should identify and provide key pieces of customer information including:

- What motivates them to make a purchase/decision
- What are the details of their relationship/history with the company
- What they expect from the company the employees.

## A Customer-Friendly Approach

One commonality among all companies or organizations that provide good service is the development of a system and attitude that promotes customer-friendly service.

**Two critical qualities to a “customer-friendly” approach are:**

- Communications
- Relationships

## #2 Soft Skills

No matter how a customer encounters your brand, soft skills are essential for a successful customer service interaction. Here are just 10 qualities of a top-notch customer service rep:

### Active Listener

Understanding the customer's problem correctly and anticipating possible questions is the key to effective communication and successful interactions.

### Attentive

Being attentive to all of the details the customer shares helps pinpoint the problem, avoid misunderstanding, and provide the best solution.

### Communicator

By working the front-lines of the company, it's important to communicate knowledge and information to customers—clearly and concisely. Make it easy for customers to understand the interaction whether it's over the phone, on chat, or via email.

### Confident

Confident customer service reps create a foundation of trust and professionalism with customers.

### Decision Maker

The ability to make a decision is extremely important. By feeling confident in your role, you'll also feel comfortable making hard decisions for various customer needs and questions.

### Empathetic

The ability to understand and share feelings of another person is crucial for customer service reps. Showing empathy and creating an emotional connection earns lifelong customers for the company.

### Flexible

Flexibility in thinking helps find the right way to communicate with every customer and deliver them a personalized experience.

### Positive

A positive and friendly attitude is the basis of a smooth interaction where the customer is more likely to be satisfied with the service.

### Problem Solver

Customers won't always diagnose their issues correctly. A great rep takes the initiative to solve the issue at hand and anticipate any future problems the customer may have and address it during the current interaction.

### Team Player

Being able to work for the good of the entire customer service team creates a positive and supportive environment. This will increase rep morale, drive productivity, and result in great interactions.

# #3 First Impressions

The reality is, we prefer doing business with those we like and trust. Impressions are key to developing trust and confidence in the customer.

## Ways to Create a Positive Impression:

- Thoughtfulness in meeting the customer's needs
- Taking personal responsibility for a customer
- Quick problem-solving for the customer
- Offering immediate assistance
- Friendliness
- Using the customer's name in a conversation
- Pleasant tone of voice
- Polite and courteous manners
- Genuine and thoughtful conversations

## Factors that Create a Negative Impression:

- Making the customer wait
- Not saying "please" and/or "thank you"
- Speaking loudly or condescendingly to customers or colleagues
- Making faces, frowning, acting distant, not smiling
- Looking disheveled or like you don't care
- A poor handshake
- Focusing on another task while addressing a customer

Remember, impressions stay with those you meet, especially customers, and once registered, negative impressions are difficult to overcome. We'll cover many of these factors throughout training.



## #4 Non-Verbal Communication

Body language has the ability to say more than words. [A study found](#) that 55% of what we learn from others actually comes from their body language.

Oftentimes, the way information—good or bad—is presented impacts how it is received. Because visual perception plays an important role in impressions and reactions, it's important to convey the importance of the following body language components during in-person interactions:

### Smiling

Facial expressions set a positive tone before a word is even said and have the power to immediately disarm a disgruntled customer.

### Eye contact

By looking into a customer's eyes they'll sense that they are being directly addressed and paid attention to.

### Appearance

When interacting with customers, dress neatly and in a professional manner to let customers know you take the role seriously.

### Greeting

When shaking hands with a customer, a firm and professional handshake is expected.



# 55%

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# #4

## Non-Verbal Communication Cont.

### Attentiveness

When listening to a customer, slightly lean towards them and nod ever so slightly to indicate active listening and attentiveness.

### Hand gestures

Use hand movements to best emphasize what you say and your feelings.

### Personal Space

Leave adequate distance between you and the customer to ensure they feel safe and secure.

### Posture

Your pose or posture should express interest, friendliness, and openness.

### Observation

Notice how your customer behaves and how they react while providing service.

These little, interpersonal actions can make or break an interaction with a customer.





# #5 Telephone Etiquette

In the world of customer service most people hate picking up the telephone. However, this still serves as the primary support channel with 47% of interactions taking place by phone.

Because every telephone encounter is blind, customer frustration tends to be greater than any other communication medium. After answering automatic prompts and sitting on a hold, a customer just wants to be helped quickly and efficiently. From answering the phone to troubleshooting, here are easy-to-follow steps to ensure friendly, over-the-phone service.

## Answering the Phone

- **Clear your mind:** stop whatever you are doing and turn your attention to the phone call. In doing so, you will increase your chances to have a successful call.
- **Pick up the phone within three rings:** more than three rings signals chaos or inattentiveness.
- **Give your name:** this courtesy serves to personalize the customer service experience as well as allowing the customer to hold the representative accountable for the level of service.
- **Ask questions:** asking to help as soon as possible tells the customer you are there to serve their needs and solve their problems.

### Let's piece all of these together:

*Good morning, thanks for calling Lessonly Worldwide.  
My name is Ollie; how may I help you?*



# #5 Telephone Etiquette Cont.

## Troubleshooting

Unfortunately, there are unavoidable situations that may upset a customer. Here are some tips to best handle these difficult moments.

### 1. Putting a Customer on Hold

- Simply ask the customer if you can put them on hold.
- Explain to customers why you are putting them on hold.
- Thank customers for holding.

### 2. Transferring a Call

- Ask the customer if they mind being transferred
- Explain why they are being transferred to whom they'll be speaking with next

### 3. Taking a Message

- Explain that the appropriate person is unavailable
- Give a reasonable estimate of when the co-worker will return

### 4. Offer to help the caller as much as possible

- Ending the Call
- End the call on a positive note
- Repeat any steps or actions that need to take place



# #6 Tone of Voice



Because a large portion of customer service interactions still take place over the phone, it's not what you say, it's how you say it.

The moment a customer picks up the phone, body language and visual perceptions disappear and the tone of voice becomes dominant. Nearly the entire message projected to the customer over the phone is derived from tone of voice and attitude. For example:

- A flat tone of voice says, "I don't like my job and would rather be doing something else."
- A slow pitch and presentation may convey aggravation or lack of engagement.
- A high pitch, rapid voice says, "I'm enthusiastic and eager to help."
- A loud voice could signal aggression or frustration.

**Therefore, keys to good phone conversation include:**

- Inflection
- Volume control
- Pacing

## Inflection

Inflection is what happens when you read a book, or tell a story — it's the wave of high and low in your pitch that makes what you're saying interesting.

When customer service representatives repeat a number of phrases and information a day, they tend to become monotone. Therefore, it's important to improve inflection by:

- Breathing — regulate so each breathe is deep and slow
- Changing around the phrase you use — repetition equals monotony
- Smiling when on the phone — this causes muscles to contract, creating a more positive tone.

It's also important to be aware that too much inflection sounds unrealistic and forced.

## Volume

Speaking in a moderate voice is the norm for customer service as high volume scares and intimidates people. Low volumes can be very effective, especially when a customer is irate as it can be calming. Speaking louder for short bursts can occasionally emphasize or focus attention, but this technique should be rarely used.

## Pace

Pace is a great tool to build rapport with customers. Customer service professionals recommend mimicking your customer's pace. Speaking too fast may confuse customers while speaking too slowly may seem condescending. By controlling the pace of the conversation, customer service representatives can get the customer to consider what is being said while placing emphasis on important items. This is also beneficial when articulating a solution or answer to the customer in a way they understand.

# #7 Do's and Don'ts



Customer service representatives face situations when what they say makes or breaks an interaction every day.

To avoid a potentially frustrating or angry interaction, steer clear of these ten phrases:

- “No.”
- “I don’t know.”
- “That’s not my job/department.”
- “You’re right – that is bad.”
- “Calm down.”
- “I’m busy right now.”
- “Call me back.”
- “That’s not my fault.”
- “You need to talk to my supervisor.”
- “You want it by when.”

**No:** Everyone hates the word “no.” It’s de-motivating, discouraging, and disinteresting. “No” is tantamount to bad service. While there are times that saying no is inevitable, there are other ways to accentuate the positive and not the negatives of the situation. Try using phrases like, “What I can do is...” to demonstrate that you care and want to provide quality service despite limitations.

**I don’t know:** Good service means never saying, “I don’t know.” When a customer hears this phrase they hear, “I don’t feel like finding out the information you need.” By saying “I don’t know,” customer service reps also increase the chance of losing the customer’s trust. Instead, it’s better to say, “I’ll find out” or “Let me look into this and get back to you ASAP.”

**That’s not my job/department:** When a customer asks for something to be done that you don’t know how to do or don’t have the authority to do, take the initiative to put him in contact with someone who can. It’s best to lead them to the person or department that can solve their problem and use the phrase “Let me transfer you to someone who can immediately help you with this problem.”

**You’re right — that’s my bad:** Many inexperienced customer service reps think that by sympathizing with the customer’s problem, they’ll win over the customer rather than solving their problem. Therefore, it’s important to empathize with the customer to a degree while trying to solve the issue. Rather than saying it’s your mistake, try to accommodate the customer with phrases like, “I understand your frustration, let’s see how we can solve this problem.”

**Calm down:** When customers are upset or angry let them vent (within reason) to help them calm down. Actually telling a customer to calm down is condescending, and often only escalates the issues. It’s better to say, “I’m sorry,” and begin the process of solving their complaint or request. While apologizing doesn’t mean you agree with everything the customer says, it is a means to empathize with them and move the conversation beyond frustration.

**I’m busy right now:** It’s not easy to juggle customers. While a representative may be helping one customer, they have another on hold. Asking a customer to be patient or politely asking them to wait is very different than putting them off and saying you’re too busy to help. Likewise, if the customer visits in-person, don’t leave them standing there. “Being too busy” is tantamount to saying you do not care and they are not important.

## #7 Do's and Don'ts Cont.

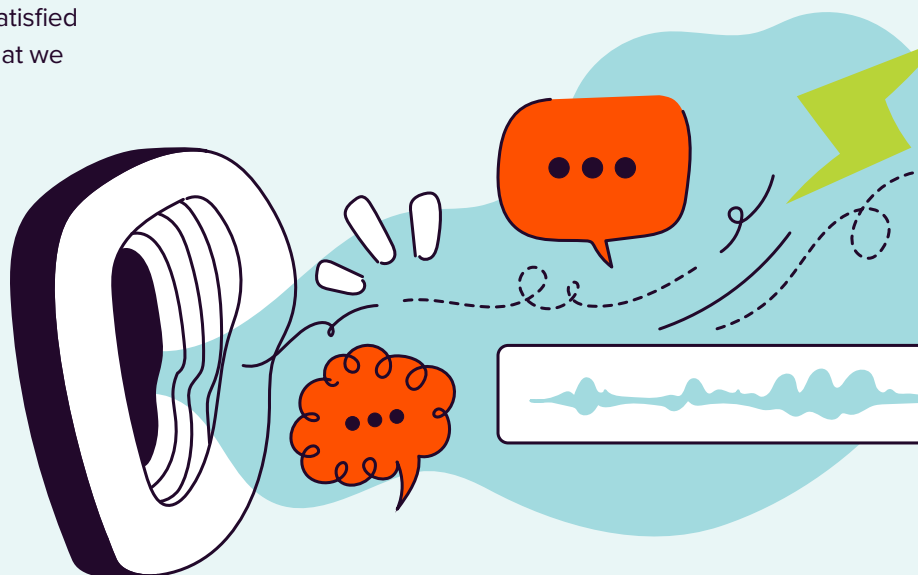
Instead, let the customer know they are important and you are aware of their presence. Better to say, “I’ll be with you in a moment” or “Please hold and I’ll be right with you.”

**Call me back:** This expression conveys little interest on the part of the customer relation’s employee for the needs and wants of the customer. You should always call the customer back because you value their relationship and are responsive to their requests. Being proactive is part of good customer service.

**That’s not my fault:** If an angry customer accuses you of creating a problem, rightly or wrongly, the natural reaction is to be defensive. However, this is not the best course of action. The customer has a problem that needs to be solved. By resisting the need to defend yourself, and focusing on the needs of the customer, you can resolve the problem faster and with less stress and confrontation. We’ll discuss how to communicate with angry or dissatisfied customers later on, but it’s best to say “Let’s see what we can do about this problem.”

**You’ll need to talk to my supervisor:** This cliché of bad customer service has angered and frustrated customers for decades. Customers often ask for things outside of the scope of your role or authority—maybe even outside the services or products of the company. While passing off these requests to your manager is a tempting option, it’s better if your attempt to solve the problem yourself or go directly to your supervisor to get a solution. Then, you’ll become a service hero for the customer and the supervisor. Try saying, “Let me find that out for you.”

**You want it by when:** Customers are likely to make unrealistic demands, especially when it comes to time. While it easy for your first reaction to be annoyance, don’t make a snide or sarcastic comment. The best approach is to hold off on displaying a negative attitude





# #8

## Unsatisfied Customers

It's likely you'll interact with a customer who is simply unsatisfied. However, there are steps to take that turn this challenge into an opportunity.

When coming into contact with a customer, communicating with them, analyzing problems, do not forget to provide good customer service. This means accountability, responsibility, and taking action to satisfy the customer. If your customer is unsatisfied (for just or unjust reasons), try these techniques to win their support and continued loyalty.

### Listen

It is of primary importance when dealing with an unsatisfied or complaining customer to listen attentively to their complaint, gripe, frustration, or grievance. Be patient, attentive, and friendly.

### Express you are sorry (within reason)

This can be tricky. While some customers are looking for a sincere apology, some may feel it's disingenuous. Apologize for frustration and inconvenience when applicable to let the customer know you care about their feelings.

### Do not argue or interrupt

This will only worsen the situation, especially if the customer is angry. Let them speak before you try to move the conversation forward.

### Do not lose your self-control

If you stay relaxed, customers will most likely calm down.

### Point out facts

Listen carefully and write everything down so you can accurately reference key facts or points made during the conversation.

### Admit the problem

If you can suggest a solution, do it. If not, tell the customer what action you will take and what actions will follow. Never make the mistake of promising something you can't do.



## #8 Unsatisfied Customers Cont.

### Involve the customer in the solution

Suggest the customer alternative solutions, if they exist. They'll appreciate the opportunity to be involved in the process.

### Follow up

Make sure that the promised measures are taken. If you do not fulfill what was promised and ignore the customer's complaint, the problem will escalate and become more difficult to manage.

### Give the customer a "way back"

Sometimes customers are wrong. You should let them leave the interaction with dignity so they don't feel embarrassed.

### Do not question the customer's correctness

It's important to believe the customer is in the right from the very beginning. Always be open minded toward their problem or opinion so they feel they are being listened to.



# #9 Problem Solving



One of the top reasons for customer loss is failure to solve their problem. So, while it's important to consider how to communicate with an unsatisfied customer, it's equally important to solve the problem at hand.

When you listen to the customer's complaint you take responsibility to solve the problem. As a customer service representative, you should always:

- Listen with full attention
- Behave without aggression, and without arguing
- Avoid extending excuses for the problem, and thank the customer for drawing their attention to it and helping solve it
- Express sympathy and full understanding
- Ask necessary questions to get more complete information and a full understanding of the situation
- Find out exactly what the customer needs you to do for them
- Explain first what you can do, and gently add what you cannot do
- Discuss in detail all options, and then discuss the best solution
- Undertake immediately what was discussed
- Check the result to make sure the customer is completely satisfied



# #10 Service Leaders



Customer service leaders rarely understand how their actions, tone, and attitude affect the performance and success of their staff. As a leader, the first step to motivating your staff is to demonstrate the customer service qualities you want them to emulate.

There are a number of factors to take into account as you seek to build a successful customer service unit:

1. Greet your staff in the morning. Start out the day with a positive attitude.
2. Discuss your feelings. Don't vent in front employees, but remain calm. If there is a problem, it's important to discuss it in an appropriate manner.
3. Do the right thing. When faced with a difficult customer, follow correct customer practices. In other words, practice what you preach.
4. Support your staff's decisions. As a leader, customers often ask to speak to you when they're upset, thinking you'll overturn your employee's decisions. While this may be necessary at times, often the employee was correct. It's important to build morale by sticking up for your employees.
5. Empower reps to provide great service. In addition to supporting their decisions, encourage autonomy. They ultimately need to feel assured that they are trusted and have the appropriate power to solve a problem.
6. Learn from others. Managers do not have all the customer service answers; there is nothing worse than a "know-it-all" manager. There are opportunities for learning and coaching everyday.
7. Listen to employee needs. A good leader should listen to employees and take their ideas, opinions, and input into account.
8. Socialize. Get to know your staff, their personal lives, and what is important to them. Take the time to celebrate achievements and special occasions to boost employee engagement and team morale.
9. Use good telephone etiquette. Be your staff's best example of manners and friendly interactions.
10. Say "thank you." Be generous with compliments and praise your staff their efforts. Thank them for a job well done and foster an environment of recognition.

# #11 Team Training

Customer-centric companies strive to deliver a phenomenal customer experience. The secret to doing so? Great customer service training that develops and empowers reps to deliver that great experience.

This training manual is a great starting point to building a training program that helps your team learn, practice, and perform at the highest level. Check out these resources:

## [Employee Training Plan Builder](#)

Hiring new team members without an employee training plan is less than efficient. Our free employee training builder walks you through a series of questions that will result in a detailed training plan for your team.

## [Customer Service Training Calendar](#)

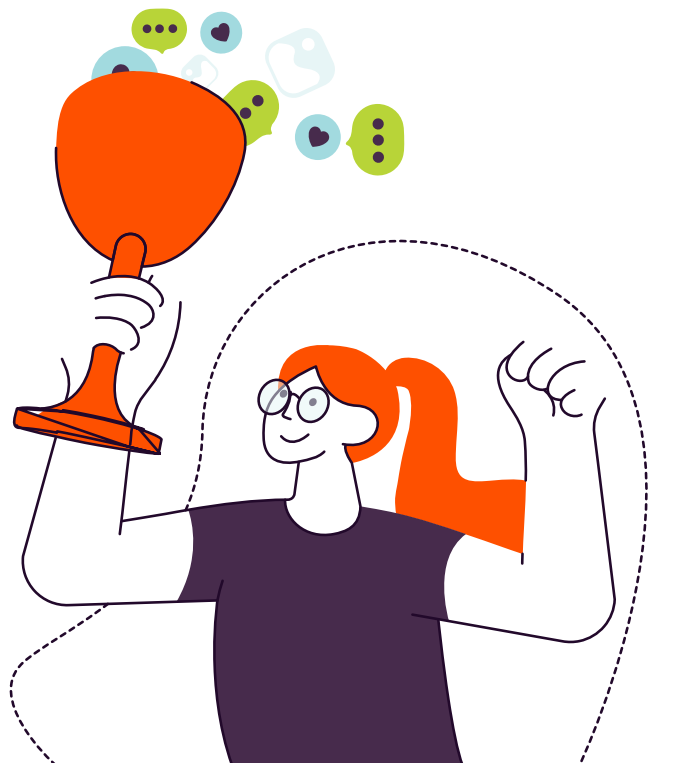
Training is a critical part in doing better work. Our customer service training calendar focuses on key training topics that every team should cover during a year.

## [Customer Service Training Ideas](#)

As a customer service leader, it's your job to ensure reps are properly trained and prepared to handle just about any situation. These training activities offer hands-on and engaging learning opportunities for some of the principles featured in this manual.

## [Better Work Guide to Customer Service Training](#)

This guide is jam-packed with everything leaders need to take customer service training to the next level. Get expert insights, customer service training tips, and more.





## About Seismic

Seismic is the global leader in enablement, helping organizations engage customers, enable teams, and ignite revenue growth. The Seismic Enablement Cloud™ is the most powerful, unified enablement platform that equips customer-facing teams with the right skills, content, tools, and insights to grow and win. From the world's largest enterprises to startups and small businesses, more than 2,000 organizations around the globe trust Seismic for their enablement needs. Seismic is headquartered in San Diego with offices across North America, Europe, and Australia.

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