



THE CUSTOMER SERVICE COURSE YOU DIDN'T KNOW YOU NEED

Use the Power of the 7 Service Triggers to
Avoid Annoying, Frustrating, and Angering
Your Customers

An Online Training Course from
CustomersThatStick.com

WORKSHEET:

Trigger Prevention Planning

About This Worksheet

One of the roadblocks that prevents many people from focusing on prevention is knowing where to start.

You've learned some great principles in this course that can help you prevent and avoid a great many service issues, so now we just need to take a moment to implement the principles.

The key to prevention is being proactive, looking at our customer's journey and seeing what we can improve so that we do not pull any of the triggers.

You will find three different approaches below:

- Hassle Mapping
- Authority Mapping
- Transfer Mapping

Like the triggers, the three processes do not exist in isolation. There will be overlap among them. That's okay.

To use these exercises, simply take 5-10 minutes, pick a sheet, and work through it.

Working through the exercises should only take a short amount of time. Then, you can assess how and when to implement the changes you come up with.

You can rerun the exercise for each major issue you have. For example, work the top three situations in which you might transfer customers.

The exercises are meant to be self-paced and to help you apply an outside lens to your common customer experience challenges.

Work through them at your convenience and enjoy your new ideas for reducing customer hassle and creating more delighted customers.

HASSLE MAPPING

What is a preventable customer hassle issue I confront in my job? *It can be something that is common or something less frequent that's time-consuming when it does occur.*

What is the source of the hassle? *For example, customers complain about the amount of financial info they have to collect for the application process.*

What measures can be taken to prevent this from occurring? *Is the process truly burdensome? Perhaps simplification should be discussed with those who have the authority to change it. If the process can't be simplified, what can be done to make it less of a trigger or hassle? Perhaps I can use framing to establish the "why" for the information with customers or create a helpful tip sheet for going through the process.*

How can I prepare myself to work with customers who are upset about being hassled (trigger already pulled)? *What options can I offer the customer? What language or pivots can I prepare ahead of time? What can I do to reduce the hassle once the customer gets to me?*

AUTHORITY MAPPING

In what situation has a lack of authority or knowledge previously prevented me from providing customers with the assistance they needed. *I'm unable to waive late fees. I don't have clearance to process returns. I don't know how to process a shipment cancel and reship.*

What do I need to learn, do, or suggest to prevent this from occurring in the future? *Can I ask for the authority to perform these tasks and show my manager how many customer issues it is causing when I can't resolve it on the spot. Can I get Bill to show me how to process a cancel/reship?*

What workarounds (that do not violate policy or ethics) can I use in these situations? *Can I ask my supervisor to setup a priority process for processing refunds? Can I transfer really upset customers manually without waiting for them to be handled via the queue?*

TRANSFER MAPPING

What is a common situation in which I have to transfer a customer?

I have to get new customers to Billing for account setup. I have to transfer customers to Tech Support for even the most basic questions about their online accounts.

Why does this situation occur? *Are customers being inaccurately routed to me by other people/departments? Is there bad information on a website or elsewhere? Is it simply a natural event? (i.e. I am the first line of support and I transfer what I cannot resolve.)*

What are the issues around the transfer process? *Are customers upset that they are being transferred? Are customers worried about being abandoned? Are customers not being taken care of after being transferred?*

What can I do to minimize these transfers and make them more pleasant? *Can I ask to have the website updated with correct contact info? Can I let Department A know that these issues go to Department B, not me? What language can I prepare for the inevitable times? Do I need to establish contacts in the department I'm transferring to in order to better facilitate and follow up?*