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# Introduction

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I wrote *Be Your Customer's Hero* for one reason: It's the book I wish I'd had during my years of owning and running retail service businesses. I'd always wanted something that showed frontline employees not just what they needed to know to be competent at customer service but what they needed to know to be great at it. I wanted a book that was easy to read and spoke realistically about the challenges they faced, that would help them take charge of their own mindset and better understand the mindset of their customers, and that would serve as both an instruction manual and a reference manual. In short, I wanted a book that would prepare my front-line employees for the difficult, unclear situations that often present themselves in the real world of customer service. *Be Your Customer's Hero* is that book.

This book is about the reality you face at work every day, where even your best customers can be complicated, irrational, and easy to disappoint. Where you can deliver perfectly and still not meet the customer's ever-shifting expectations. Where you have policies to follow, forms that customers must sign, and problems created by departments you've never even spoken to. Where you can find yourself constrained by limited resources or facing difficult decisions because you aren't able to give the customer what she wants. And where you can sometimes find that customers are mean, are bullies, or are just plain crazy.

The techniques you'll discover in this book aren't magic, but they can be magical. Much of what you'll learn is based on my own

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experience working with customers and customer-facing teams, and it is extremely powerful. This book is not an academic exercise; it's designed to provide you with actionable tips and tactics you can use immediately. Take what works for you; discard what doesn't. No matter your experience level, you'll find ideas and approaches that can have a major impact on how you work with customers and that will make your job infinitely easier and less stressful.

*Be Your Customer's Hero* is designed not just to educate but to motivate. It covers frontline customer service from A to Z, from basics like smiling all the way to advanced techniques like using sales-closing tactics. If you've had any customer service training, you've likely learned some of this before. Yet there's a gap in the customer service world between what everyone knows and what they actually do. Even the best of us can fall into bad habits and need to be motivated to re-embrace the fundamentals.

This book is structured in 10 parts with short chapters. Each part focuses on a single topic you can explore to make yourself a better customer-facing professional. Parts One through Three deal with the mentality of customer service; they'll help you see inside your customer's head—and your own. Parts Four through Six present the skills you need to become great at frontline service; they focus on great teamwork, customer service basics, and communication skills. Parts Seven and Eight show you how to handle difficult situations and work with nightmare customers; they explore specific techniques you can use to succeed in the most challenging circumstances. Part Nine covers customer service on the digital front lines, and in Part Ten, you'll see how you can put together everything you've learned.

Out of necessity, the book is composed of short chapters. The only way to cover so much ground is to hit each topic hard and fast. Topics that could have had an entire part of the book dedicated to them are covered in a few pages. Topics that could easily have been discussed in a variety of different places are discussed in one spot. To tie these pieces together and to help you find the information

you need, you'll find references to other chapters within many of the chapters of the book.

• • •

So what does it really mean to be your customer's hero?

First, forget everything you've read about over-the-top acts of service, the kinds of things that go viral on the Internet. Forget about airlines that buy an entire flight full of passengers holiday gifts or bank ATMs that spit out expensive, customized presents for their customers. These are publicity stunts, not customer service, and while I love it when companies do these outrageous things for customers, they have nothing to do with real-world, day-to-day service.

To be the customer's hero means one thing above all else: It means being there when the customer needs you and making your personal interaction with the customer as memorably positive as possible. At my customer experience workshop and consulting company, CTS Service Solutions, and on its Customers That Stick™ blog, we often discuss Hero-Class™ customer service. In keeping with this theme, you'll see terms like "Hero-Class™ rep" and "Hero-Class™ customer experience" throughout this book.<sup>1</sup> To be Hero-Class, or to be your customer's hero, simply means to be completely, obsessively focused on your customer and to make the effort to meet or exceed her expectations every time.

Perhaps this talk about being the customer's hero seems quaint, maybe even a bit disconnected from the real world I've promised to speak to you about. But I truly believe that, despite the challenges of working in a customer-facing position, the quality of your work experience will be shaped by you as much as by your environment. I have the greatest respect for those who work on the front lines with customers; many years ago, I worked many of those same front lines myself, as a telemarketer, behind the counter at a musical instruments retailer, and in the aisles at a large bookseller. Front-line service reps are some of the hardest-working and most under-appreciated people in business, and working with customers can



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sometimes be a thankless job. I wrote this book because it doesn't have to be. If you have the tools and techniques to create better experiences and to resolve issues more quickly, you'll find frontline service to be highly gratifying, and even fun. Of course, there will be bad days and even worse customers, but when you adopt a Hero-Class approach to customer service, your time on the front lines will become infinitely better.

Hopefully this book will give you the inspiration, confidence, and skills you need to become your customer's hero.

#### **Note**

1. Customers That Stick™ and Hero-Class™ are trademarks of CTS Service Solutions, LLC. To keep things informal, I am going to drop the use of the TM in the remainder of the book.

# PART ONE

## GREAT SERVICE IS ALL IN YOUR HEAD

### CHAPTER 1

---

## The Customer Is Always \_\_\_\_\_

Let's start with a quiz. It's a simple one. Just fill in the blank in the chapter title. If you've worked in customer service, one word will almost certainly come to mind to complete the phrase. It's the phrase that has been drilled into our heads, for better or worse, since our first exposure to customer service.

And let's be real—none of us are particularly fond of it.

At a recent conference, I struck up a conversation with a front-line service rep. When I mentioned that I was writing a book on customer service, the first words out of his mouth were, “What do you think of the saying, ‘*The customer is always right*’?”

“I think it's ridiculous,” I replied.

He smiled, and then gave me a good-natured slap on the back. “I'm with you, buddy. You should see some of the customers I deal with.”

“*The customer is always right*” is perhaps the most repeated and hated phrase in all of customer service. Taken literally, the idea is a joke. Customers are not always right; in fact, they're often so wrong that you wonder what they're even talking about.

Yet the focus on the literal meaning of the phrase has overshadowed the original intent of the idea: putting the customer first above almost everything else. The phrase was designed a long time ago to shift the mindset of service reps from taking advantage of customers to taking care of customers, from giving attitude to giving

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respect. At the heart of the phrase's deeper message is a fundamental truth of customer service, one that you must embrace if you're going to succeed in a customer-facing role:

### **You and the customer are not on equal terms.**

Businesses exist to serve customers, and as a customer-facing professional, you're on the front lines of that service. You're the one who shows the customer every day how much your organization values him. Through your demeanor, your words, and your actions, you demonstrate the difference between you and the customer—that you're there to serve him and even to understand him, when he's under no obligation to extend you the same courtesy.

For instance, to deliver effective customer care, you need to understand that you don't know what's going on in your customers' lives. While most customers will never mention their personal issues when transacting business with you, your customer wants you to implicitly understand that her dog just died, that she was just diagnosed with an illness, or that she just received an eviction notice. Your customer expects your empathy, and you have to give it knowing that you might not get the same in return.

Sure, we all wish our customers would understand that two employees got the flu, one went into labor, and one quit without notice—all on Monday—and that's why the order did not go out on time. Or that our small business runs on a discount web host for \$10 a month, and when that host went down, the key email we were sending on their behalf disappeared into the cyberabyss. Or that our multinational company's computer system is an amazing tool that successfully handles a million transactions a day, but that our local office cannot customize it for their needs. Of course, we wish that our customers understood that things happen, but that's not how the relationship works.

One of the first steps in adopting a great customer service mindset is embracing the idea that the customer relationship is not an equal one, that we're there to serve the customer and not the

inverse. As customer-facing professionals, it's our responsibility to overcome our natural inclination to expect fairness and disabuse ourselves of the notion that the customer is expected to treat us the same way we treat her.

Now, this doesn't mean that the relationship is one way all the time. Customers have responsibilities too. Nor does it mean that the customer is exempted from the basics of human decency. What it does mean is that the relationship is not equal. We're there to serve the customer, and the responsibility for the relationship is on us.

You see, I don't think the customer is always right, but I do think the customer is always my top priority. And if you begin with that idea in mind, then you're on the way to delivering Hero-Class customer service.

## Winning Is Not a Customer Service Goal

The furor all began when a family of five tried to return home to England from Spain. They neglected to preprint their boarding passes, and when they arrived at the airport for their flight home, Irish airline Ryanair charged them 300 euros (about \$380) in fees before allowing them to board. Unfortunately for Ryanair, the mother posted their experience to Facebook, and it went viral, generating around a half million likes.

Ryanair's chief executive officer, Michael O'Leary, felt compelled to respond. "We think Mrs. McLeod should pay 60 euros for being so stupid," he said. "She wrote to me last week asking for compensation and a gesture of goodwill. To which we have replied, politely but firmly, thank you Mrs. McLeod but it was your \*\*\*\*-up."<sup>1</sup>

O'Leary went even further, characterizing the woman and anyone else who doesn't print out boarding passes in advance as "idiots." He later backtracked slightly, explaining to the *Irish Independent* newspaper, "I was not calling her stupid, but all those passengers are stupid who think we will change our policies or our fees."<sup>2</sup>

Unfortunately, O'Leary's comments reinforce the stereotype that businesses and customers are at war and that businesses, particularly large ones, are willing to step on their customers if it will create a nickel more in profits. However, this stereotype is not true for most businesses.

Having been involved in a number of businesses throughout my life and studying businesses both big and small, I can tell you that "screwing the customer" is not what drives most businesses. Are

the majority of businesses looking for ways to be more profitable? Of course. Are most looking for ways to get the maximum out of each transaction? Absolutely. But those objectives do not necessarily equate to a negative result for the customer. You can be more profitable by being more efficient. You can maximize transactions by selling customers other products or services that add value to their lives. Businesses can provide value to customers and receive value in return without trying to squeeze the customer for every possible advantage.

Sure, there are companies out there that view their customers as marks, objects in a game in which the objective is to take as much as possible and give as little as possible. These companies consider business a zero-sum game. In every interaction, someone wins and someone loses. If you look at the great companies that you admire, you'll find that none of them view their customers this way. Customer service leaders like Nordstrom or Amazon have a "relational view" of customers, not a "transactional view." (In the customer experience sphere, these terms are often used slightly differently and can be time based instead of viewpoint based.)

The transactional view of customers is what gives business such a bad reputation and results in expressions like "churn and burn." With a transactional approach, businesses seek to get the most out of each sale, no matter what the impact on the customer. They take the customer's money and then in essence say "Next victim," just like the cook at my elementary school used to say (if you ate his food you'd know why). These companies don't care if they see the customer again or, at least, don't care enough to sacrifice any potential profit in the transaction.

In a relational approach, businesses still attempt to get the most out of each sale, but they do so within a framework where the relationship with the customer is a top priority. In a relational approach, you often sacrifice short-term profit for the long-term relationship.

It's important to note that working with a relational approach does not mean you do everything a customer requests. Each organization will have its own limits on where to draw the line in each sit-

uation. For instance, most organizations would probably not honor the special pricing from a Memorial Day sale in August.

The difference between a transactional approach and a relational approach is simple: Transactional companies always place the line where it extracts the most money from the customer; relational companies look at the relationship and try to find a healthy balance.

This book is for those who believe in a relational approach to customers. If you're focused on a transactional outlook, I can't help you. You need a different book.

As you read the chapters that follow, bear in mind that your goal is not to win, not to get one over on your customers. Your goal is to create a healthy, profitable long-term relationship with customers that provides value to both parties.

The only winning that works in customer service is win-win.

## **Notes**

1. Oliver Smith, "Ryanair Boss Slams 'Idiot' Who Forgot Boarding Pass," *Telegraph*, September 5, 2012, <http://www.telegraph.co.uk/travel/travelnews/9522191/Ryanair-boss-slams-idiot-who-forgot-boarding-pass.html>. Accessed September 23, 2014.
2. Charlie Weston, "O'Leary Denies Calling Woman 'Stupid' in Boarding-Pass Row," *Irish Independent*, September 6, 2012, <http://www.independent.ie/irish-news/oleary-denies-calling-woman-stupid-in-boardingpass-row-26895014.html>. Accessed September 23, 2014.

Thank you for reading this sample of *Be Your Customers Hero: Real-World Tips and Techniques for the Service Front Lines*. To continue the journey and see all that this book has to offer, click on the buttons below to order a copy through one of the following booksellers.

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Adam Toporek

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