SERVICE STANDARDS

Developed through the efforts of the partners
in the Canada Business Service Centre

CBSC
Service Standards

The Canada Business Service Centre promises to be a management of information centre, par excellence. It offers business immediate access to a wide range of government information and expertise. The partnership of 11 departments, the Province of Manitoba and the City of Winnipeg will facilitate the dissemination of information and increase the probability of success in the private sector.

As individuals in the Canada Business Service Centre, we have a pivotal role to play. We are the means by which information will be accessed and disseminated. We must provide information in a timely and efficient manner so as to ensure our clients continue to use the Centre and its services with regularity. The quality of service delivery that the client receives is our responsibility and will be the basis for repeat business.

The standards of service that follow were developed by 200 professionals who took part in the workshops. They are a reflection of your commitment to quality and excellence in service. The standards are not complete, they will evolve and be enhanced on a continuous basis.

These standards address service in a concrete way, providing guidelines that address promptness, courtesy, attentiveness, efficiency and the presentation of self. They are a statement of what you, the professionals who developed them, expect of yourselves and feel the client has a legitimate right to. More than this, they are a statement of who we are in the context of our work. These are the standards against which you may compare yourself in all the moments of truth you encounter.

It has been both my pleasure and a learning experience to facilitate the process that resulted in these standards.

Sincerely,

L. J. Quesnel, Ph.D.

CLIENT AWARENESS

Definition: adding the personal touch in assisting clients through the maze of possibilities to reach the service they require. Management support and consent is necessary to make client awareness genuine.

GET TO KNOW YOUR CLIENT

Determine who your clients are and actively learn the customs and courtesies that will make them comfortable. Develop an awareness of cultural differences and individual needs.

Pick up some sense of the emotional status of your client by establishing a rapport. This can underline the sincerity of your concern with their needs.

Listen and hear your client out. Paraphrase to make sure you are both on same wavelength regarding their special needs, either physical or emotional.

BE ATTENTIVE

Attentiveness is being actively involved in the conversation and in tune with your client's emotional status. Show interest and compassion to give your client a level of comfort that you care about them as a person.

People are aware of attentiveness through your body language. Make a point of looking at the client, leaning into the conversation, etc..

Ensure that your client does not feel that paperwork has a priority over them.

Use some appropriate indicators to clue the client into the fact that you are listening, through dialogue like "I understand" and "I agree". Use of non-English words like "uh-uh" or "yeah" instead of yes, or I agree, is not recommended.

We assume that people understand. Take notes, to avoid presuming on the accuracy of memory. Your clients will be impressed with your diligence.

Paraphrasing, letting someone talk to you and saying back what you believe they said, is a method of assuring the client that they are being well-understood.

YOUR CLIENT HAS THE RIGHT TO BE HEARD

Be patient, avoid interruptions, interrupting, or boosting the client along. Don't talk just to hear the sound of your own voice.

It is acceptable to be busy with your hands during conversation, as long as it is related to the task and the client is aware of it.

Be aware of communication difficulties, like the use of jargon and acronyms. Be sensitive to people who use English as a second language.

Finally, be truly sincere. Avoid being phony by being obviously overattentive or overdoing it.

DO THE LITTLE EXTRA

Treat people differently to treat them the same. Respond to each client as an individual - to the service they need because of who they are. The generic client does not exist.

Personal attention means doing more than routine, doing a little extra, service above and beyond.

Keep the client informed of the progress of their service.

Treating clients on such a personal level will result in personal satisfaction back to you as a service giver.

SHOW EMPATHY

Empathy means placing yourself in the position of client (how would I react in their situation?) Have a sense of how important this event is to them. Understand the importance and the ramifications of this difficulty for your client.

Reacting in some fashion, by saying "I understand" or "that must have irritated you" shows compassion. Stay away from "but and however"

A sense of humour may be appropriate in some instances, however tact is the key.

Don't be condescending. When someone phones you don't make them feel like an idiot, even if they're asking a stupid question. Understand that people may be in crisis or frustrated at the point of their call.

EFFICIENCY

Definition: When you meet the time frame you and your client have established, you've met their expectations. If you are ahead of schedule, you have exceeded their expectations. Efficiency is knowing what is possible and working to achieve it.

PROVIDE KNOWLEDGE

Knowledge isn't knowing all the answers, it's knowing where to get the answers. Feel free to tell people that you do not have a solution for their problem, but offer a referral that is of assistance.

All front line, or first point of contact individuals should be aware of all programs offered by the department and know which individuals deal with each program.

Develop an electronic or paper reference card to keep by your phone - your most lucrative sources of information and answers to unusual questions. Develop a notebook with clear indexes.

If the service your client is seeking doesn't exist, offer alternatives and options. Never simply say no.

Strive towards accuracy. No one expects perfection, but people respect honesty and effort.

BE RELIABLE

Offer a concise, direct and accurate response to enquiries. If you don't know the answer, don't give them half truths - simply say, I'm not sure, but I'll find out and call you back.

Offer a length of time in which you will return their call. If, by that time, you haven't been able to find the answer, call back.

Explain that the person you are trying to reach is out, or the information is unavailable at the moment, but that you will keep working on their behalf and will call back with a response as soon as it is available.

Always follow through on what you say - or don't say it.

Should a mistake occur, be willing to admit to it, then make up for it. Apologies are nice, but they are not solutions.

Do not forward someone through the system unless you are certain of their destination and the service they will receive.

Do periodic follow-ups to see if the clients you are referring are finding the solutions they are looking for.

Keep the client apprised of any significant changes in the solution. If it cannot be delivered, offer an alternative.

Be conscious that you are not shuffling people through the system with a wad of pamphlets.

SOLVE PROBLEMS

Be business-like and stay focused on the topic. Assure your client that you will work with them to find the solution.

Ensure you have a clear definition of problem. Don't assume, ask questions. Restate the problem as you see it to ensure accurate communication is taking place.

Ask the client what they think would work for them.

Listen, hear and generate alternatives. Offer workable solutions based on your experience and expertise.

The systems in place can sometimes hinder efficient solutions to client problems, don't be afraid to take the risk of offering unorthodox solutions provided they fulfill the individuality of the client's need.

Ask your client when they need it - because in many cases the need isn't immediate.

Set the time frames for what they can expect, ensuring that you plan for the unpredictable and include it in the time frame for commitment.

Make your commitment by offering a date to provide the answer. Remember that if you are early, it looks better than if you are late - give yourself the time you need.

Check on what has already been done on behalf of this client to avoid duplication of efforts and wasted time.

Keep your client apprised. Let people know what you're going to do for them

Provide service beyond what is asked of you and imply that this is the standard. (Client should sense 'value')

If you are uncertain of the success of your alternative, call your client and verify that their needs have been met.

Close off the service transaction by following through - give your client your card, name or telephone number and ask them to call back should they run into any problems. "If this doesn't solve your problem, get back to me at 555-5555."

Assess your success by measuring the degree of match between the aspects of you client's problem and the information you provided.

BE PRO-ACTIVE

Understand that your client has limited experience in the internal workings of government. Be their guide and teacher. Don't expect them to learn the organizational charts, but give them enough information to make them comfortable in the system.

Anticipate client needs. Make sure you understand changes and new policies as they come into effect. This allows you to offer a clear picture of the latest developments to your client.

Assess your work systems and streamline them to avoid unnecessary duplication on your part or on the part of your client.

PROMPTNESS

Definition: Prompt does not mean you answer the client right away. You may need to take some time to provide the answer - the correct answer. The key is to acknowledge the client. This begins the service cycle.

BE TIMELY

Be on time for appointments and meetings within five minutes.

Clients with appointments should be dealt with immediately.
Clients without appointments should be dealt with within 2 minutes.

Answer the telephone on the third audible ring (on average).

Set time frames - but do not give the client false expectations. Ensure that the turnaround time is reasonable and at least what has been agreed upon with the client.

Establish a system of priorities between the conflicting requirements of different clients. Establish realistic deadlines with your client based on the need for service.

Clarify what can and can't be provided, offer alternatives if possible.

Ensure effective information exchange by getting to the point as soon as possible in the interaction and keeping to it.

MANAGE YOUR ANSWERING MACHINE

Check your messages at least every four hours whether you are in town or not. Answer them within 24 hours (8 working hours on average).

Most calls will be handled within the 1/2 hour, even to advise the client that you are attending to another matter at this time and cannot answer right now. You may not be able to reach the client, this can be the client's problem too.

If you are away from your desk, program your answering machine to respond on the first ring. Don't make your client wait 3 or 4 rings before they can leave their message.

Voice recorded messages have to be alive - let the caller know if you are away for a few minutes or a few days. Listen to other people's messages for ideas of what to do, or what not to do.

ACKNOWLEDGE THE CLIENT

Each client wants a sense of acknowledgement, a sense that service has begun

If you are busy when a client approaches, establish eye contact, give a nod, smile or use a hand gesture as methods of acknowledgement

Say, "hello" or "I'll be right with you."

A walk in client should be acknowledged as soon as they enter, with tolerance of 2-3 seconds;

Once they have been acknowledged, service should commence within 3-5 minutes. If you can not meet this, it may mean you have to get someone else to help you with your clients.

MULTI-CLIENT ACKNOWLEDGE MENT

Does a call have precedence over a walk in? Do not attempt to answer the phone and try and do business hap hazardly. You can not interrupt one client for another, put each person in a service queue.

When phone rings while you are on a call:

* excuse yourself from the current conversation as soon you are able

* acknowledge the new call. Let them know you are on another call and offer to call them back or put them on hold.

* complete your first call as expeditiously as possible.

When dealing with a client in person and the phone rings:

* excuse yourself from the client

* answer the call and advise the caller that you are with a client right now. Ask them if they wish to hold or could you call them back as soon as you are available.

* deal with the in-person client as efficiently as possible, then return the call

When on the phone and a client arrives in person:

* acknowledge the walk-in client by a nod, a smile or a hand gesture to say "I'll be right with you".

* if you can excuse yourself from the call, advise the walk-in that you will be with them as soon as you can.

* complete the phone call as soon as you can, or if you believe the call will take some time, ask if you can call them back.

WAITING

How we treat a waiting client, whether on hold or in person is a statement of mutual respect among professionals.

Clients do not mind the existence of a queue, as long as it is well managed - everyone takes their turn. The phone is considered as a turn in the queue.

Give priority to long distance phone calls over other calls and walk-ins.

A caller should not be on hold for longer than 60 seconds between acknowledgement and service.

If you know the hold will be longer than 60 seconds, retrieve the call and give the caller options such as taking a message, forwarding to someone else who can help or continuing to hold.

It is generally not acceptable to put the client on hold a second time unless the client suggests this.

If more than 5% of phone calls go to the messaging service, it is not acceptable - an alternate method of service is required.

Clients in the waiting room should be offered the same courtesy as a people on hold - re-acknowledge on regular basis - every five minutes on average.

If you must keep your client waiting tell them and let them choose if they want to wait or reschedule.

Waiting inappropriately is seen as a one-up-manship tactic.

Definition: When we ask people to define courtesy, they pause, and they utter please, thank-you, you know - just common courtesies! Yes it does mean please and thank-you, but it also means ...

BE PERSONAL

Know your client's name and use it. Use their <u>last</u> name until they have reduced the formality; that is, start with the more formal Mr. or Ms. and progress in the relationship to a first-name basis. However, if someone else enters the room, return to the formal because the new person must establish their own familiarity.

BEWARE - there is a risk of offending very easily on the first name versus last name question - it is not my privilege to use your first name, it is your privilege as owner of your name to give it to others.

Ensure you pronounce their name correctly, if you do not know how, ask.

FACE TO FACE

Smile, offer a pleasant greeting, make eye contact.

Shake hands (two or three pumps is considered standard). Offer your client a cup of coffee. Make them feel at ease, at home, comfortable.

Be careful that it is not phony.

Check that your body langugage is non-threatening

Offer small talk - situational for the in-between times-

If you are working on a project or on the phone when the client walks in, nod or make a gesture to let them know you are aware of them, or if possible, advise them <u>when</u> you can deal with them - such as "I'll be with you in a minute" or "I'm sorry, I'm in the middle of something I cannot leave, can I get back to you."

ON THE TELEPHONE

Make people feel welcome, develop a greeting that includes the business name and your name.

Ask your caller if you can put them on hold. Wait for an answer.

When forwarding calls, say: "May I tell him/her who's calling?" rather than "May I ask who's calling", this is seen as a screening mechanism.

Transferring can be direct if handled correctly, i.e transferrer stays on line to ensure call goes through.

Give your client the name and number you are transferring to in case the call gets lost in space.

When transferring calls, stay on the line and introduce people, likewise in person (don't ask your clients to re-introduce themselves).

Use the mute/hold button when discussing calls so the caller doesn't hear your laundering

When a person has been on hold, thank them for waiting

Use the speaker phone only with the concurrence of the client - they don't know who is listening.

Keep your message-takers well informed about where you are going and how long you expect to be so they can better serve your clients.

IN ALL INTERACTIONS

Use a friendly voice, keep a generally pleasant manner

Have patience when listening to caller's needs

Be polite and provide personal attention

If you ask a question, wait for an answer. Don't ask "how are you?" as you are walking away.

Recognize cultural differences and act accordingly.

Don't be presumptious of gender, age, etc.

Show respect for the client - snobbishness, capitalizing or a monopoly service attitude is unacceptable.

Don't be intimidating or condescending. Choose your words and tone of voice carefully.

Use please and thank-you. Avoid slang expressions as alternatives for words like hello, please and thank-you.

Close the client interaction pleasantly:
* thank them for calling
* say "it was a pleasure doing business"
* let the client hang up or walk away first
* see the client out

BE RELIABLE

Read back messages to verify content.

Pass messages along quickly. Messages should be moved within one hour of being taken; then the caller should have service within 8 working hours.

A message is just like a person sitting in your waiting room.

It is the message-takers' responsibility to get back to client as soon as they know the service will not occur because the target person is unavailable for a long period of time.

BE CONSIDERATE

Recognize and try to eliminate your pre-conceived ideas about certain clothing or mannerisms.

Hold meetings or conversations in environments condusive to the subject. Keep private issue behind closed doors.

Do not shout when dealing in disciplinary issues.

Be aware of the difference between license and freedom; respect the boundaries and the rights of others.

Your client is as important, and gets as much respect, as your boss. Ensure a mutuality exists in your work environment.

BE HONEST

If you cannot take calls because you are working on a deadline, have reception say you are "unavailable to take calls right now."

Admit to being uncertain, but offer to find the answer.

Deliver what you say you will.

Treat people with integrity.

FOLLOW-UP/ VERIFICATION

Ensure that the service that was agreed upon was, in fact, provided.

Call the client back to advise them of what you have done on their behalf. A few days later, call again to find out how it all went.

Do not let people feel that you have "washed your hands of them."

Assure them that they can contact you in the future.

PRESENTATION OF SELF

GUIDELINES FOR DRESS

Appropriate business dress is a difficult topic to address as it is a personal issue. People do not want to risk offending others or facing recourse from the Human Rights Commission.

But it is important, because the way you present yourself tells volumes about you and reflects your corporate or employer's image.

Therefore, these guidelines have been identified to assist people in knowing what is meant by appropriate and professional appearance.

How you perceive yourself is how others are going to perceive you. If you want to be regarded as a professional, dress professionally.

The appropriateness of dress is determined by the setting and the responsibility to reflect your corporate and client's image. In your employment contract, there should be an awareness of your responsibility in reflecting the organization to the client. As long as you are working for the organization, you have an obligation to represent your department.

Dress sensibly for your plans. If you are on a site visit and jeans, workboots and a plaid shirt are expected, that is appropriate. This same suit would not be as appropriate if you were making a presentation to these people.

Certain types of dress are considered inappropriate for an office: These include (but are not limited to) muscle shirts, T-shirts, sundresses, backless dresses and halter dresses (unless worn with a jacket) low cut blouses, mini/micro skirts, shorts and tank tops.

Business dress is considered to be a suit, a dress with jacket, a skirt or slacks with a blouse,shirt or sweater. It is important to note that there is no consideration of cost in this matter, as it is well recognized that some jeans may cost more than a dress. The importance is the image and appropriateness.

PERSONAL HYGIENE

Personal hygiene is obvious to others more than to the self. If you have not had a shower or bath for three days, clients are going to question the advice you have given and are not going to come to you again.

The judiscious use of scent - overdoing perfume/cologne is as bad as body odor or bad breath. People are extremely sensitive to smell. Ask someone close to you to be honest - and don't take offence, just correct it. (Wouldn't you rather know?)

Part of looking professional is looking like you take care of yourself - clean hair, fingernails, teeth and clothing are expected.

VOCAL IMPRESSIONS

Your tone of voice says a lot about you. How many times have you imagined who someone is, based solely on phone conversations?

Be aware of your tone of voice - be self-assured (confident, but not arrogant). Sound positive, not bored or depressed.

Be sincere.

Don't get lazy with your English. Speak clearly and choose your words carefully.

NEVER use language that someone else might consider profane. (That includes many words that have become fairly commonplace. What works on the baseball diamond doesn't fit in the office.)

Be succinct, come straight to the point, add more if it is requested.

Business English is changing - it's getting simpler. Don't use big words to impress, more often, you will lose the line of communication.

Avoid jargon, acronyms and office buzzwords, these just make your client feel left out.

Negative comments about the office, or co-workers is not casual conversation. It reflects badly on you.

THE LAST WORD - ATTITUDE

Your attitude shows in everything you do. Here are a few points to keep in mind:

Be concerned - your client's problem IS your problem.

Be helpful. From the very first moment, assure your client that you are there to assist - they are not bothering you.

Enjoy helping people, it will probably become the most satisfying part of your job.

Dwell on the positive.

Leave your troubles at home. Give yourself a break from worrying.

Recognize a bad mood and understand how selfish it can be. (I'm miserable so I will let everyone know it).

Rise above a problem by being level-headed and maintaining your dignity. Only then can you use your reasoning to come to a solution.

Remember that most people will treat you exactly as you treat them.

It's trite but it's true, do unto others as you would have them do unto you.

The most important thing to do when you encounter a difficult client is to let them talk and blow off steam. Eventually, they will calm down.

You are dealing with emotion - don't interrupt or argue. Don't get defensive. This will just prompt more emotion.

Remember that the person is mad at the situation. Rarely is a client coming at you for something you are totally responsible for - the client is often referring to "they".

In the course of their venting, listen and hear them out. Make sure they are aware that you are listening. Be attentive, use conversation prompts.

Pay close attention to your reaction. Remain professional, keep your cool (someone has to).

Stay courteous and polite and keep your voice quiet.

Once they are calm, take control of the conversation by focussing on the problem and listing the facts. Try to keep your client on track to a solution.

In order to be successful in this interaction, you must determine what the client really wants.

Tell them that you are going to try to help them, or that you can help them. Develop a team approach. Together, you can find the solution. Now, instead of you against the client, it is the two of you against the problem. Don't take complete ownership of the problem, though. That is not your role.

Express a reasonable degree of empathy, but be sincere.

Ask them what will make them happy. Maybe you can provide it, but be prepared if they say, "I don't know, you're the expert."

Decide if you are the problem-solver or if someone else is required.

Help the client as much as you can.

If you can't help, get their name and phone number and tell the client that the person who can help them will call them back. If you can't find the solution, call them back and let them know.

If it becomes apparent that the answer is not one the client wants to hear, don't lead them on. Simply tell them. Sooner or later someone is going to have to say it, don't add to their anger by giving them the run-around.

Close the conversation courteously and walk away, or hang up the phone. Don't be aggressive or inappropriate, regardless of what the client does.

A suggested closing: "We appreciate your comments and concerns." Avoid "We'll take this under advisement," and "We'll give this due thought."

Know in advance, what you, on a personal level, consider acceptable behaviour. You do not have to be subservient or tolerate verbal abuse.

If you know someone is sending an angry client, prepare yourself in advance by mentally pulling back from the situation and planning to be calm and understanding.

You may, on occasion, receive calls from people who are unstable. This will be rare. Remain polite, say something like,"we have to agree to disagree." and hang up.

DEALING WITH YOUR EMOTIONS

Be aware that after an interaction with a difficult client, you will react to the situation and suffer the aftershock. The following suggestions are offered to assist you to recover and continue.

Take time to unwind after the call.

Maintain your self image by realizing they are not attacking you, they are attacking the system.

Realize that this client is an exception.

Step out of the office for a moment, have a coffee, get some fresh air or talk about it with your co-workers. Do some physical activity to burn off the extra adrenaline. Try stretching to relieve muscle tension.

There is an Oriental techniquue of creating a mental image to calm down. Try visualizing a cup full of the garbage created by this interaction, then slowly pour it down the drain or mentally dig a hole, put the garbage in it and cover it up.

Dissipate the reaction to the last client by talking to a colleague, or someone else who can share and understand your situation.

You can learn something positive from any situation. If you share your experience with others it may help them in the future.

Maintain your own mental health and well-being, exercise, hobbies etc., make a difference on how resilient you are and how well you deal with difficult situations.

THE NEXT CLIENT

Prepare to begin anew by putting the difficult client behind you.

Think of all the people you have been able to assist, as compared to that one call.

Remember that each client is different, and deal with them on an individual basis.

Difficult clients should only make up about 1 - 2% of your calls. If you get more than that, you need more intense training in how to deal with this effectively.

Encouragement is required in being conscious of the client service we provide and ensuring we meet the standards we have designed.

If we do not measure and monitor our performance, we will very quickly fall into the trap of paying lip service to service.

We have taken the lead in defining the characteristics of customer service in our environment and our acceptable achievement standards. We are now responsible for maintaining and promoting them.

Some methods of measuring how we are doing include: conducting client surveys; focus groups; panels; and using the mystery shopper technique.

Typically, the results of these methods are one-sided as only 30-40% will respond, and these are often those who have had either very negative or very positive experiences.

More realistically, we can measure ourselves. Checklists have been designed using factors from the working sessions. Periodically check yourself to see how you are doing.

Most importantly, be honest - the one who receives the benefit is you. Self assessment is less threatening, although it can be more difficult.

The team monitoring approach can also be used successfully. This process requires a very cohesive team in order to minimize the potential conflict that can result from this exercise.

The buddy system of monitoring can also work if the participants have a mutual professional capacity to critique each other.

Encouragement and the desire to improve our image are incentives in achieving results. We agree that our standards of service have decreased substantially. We quickly realized that what is often thought of as service above and beyond is really basic service. We now have an opportunity to change our client's outlook of us. Let's take that opportunity.

IN INTERACTING WITH THE CLIENT, DID I PRESENT MYSELF PROFESSIONALLY?

WAS I PROMPT?

Did I acknowledge the client immediately i.e. on their arrival or by the third ring?	☐
Did I place the client in the queue of service?	☐
Did I ensure the caller was not on hold for longer than 60 seconds?	☐
Did I ensure a call was not put on hold a second time unless it was the client's suggestion?	☐
Did I service the client with an appointment immediately?	☐
Did I service the client without an appointment within two minutes?	☐
Did I update the waiting client at least every 5 minutes?	☐
Did I program my message machine to take messages immediately when I was not in my office?	☐
Have I updated the message on my voice messaging to let the caller know when to expect a call from me?	☐
Have I set up a system for checking my messages from my message machine and from the reception area every four hours?	☐
Did I answer my messages within 8 working hours?	☐
Have I asked co-workers to handle any of my calls?	☐
Was I on time for appointments and meetings?	☐
Did I meet agreed upon deadlines?	☐

WAS I COURTEOUS?		
	Did I welcome the client by greeting them with hello, good morning/afternoon, using good body language - good posture and eye contact. On the telephone, did I identify the department name?	☐
	Did I know the client's name and use it formally (Mr. or Ms. Last Name until relieved of formality)?	☐
	Did I pronounce the client's name correctly, and if I could not, did I find out how to pronounce it?	☐
	Was I pleasant? Did I smile, give a handshake, use a medium speed of speech and moderate volume of voice?	☐
	Was I hospitable? Did I make them feel at ease and comfortable by offering coffee, a chair?	☐
	Did I ensure my gestures were appropriate? non sexist or assuming?	☐
	Did I ask the client if they could hold, **AND** did I wait for an answer?	☐
	Did explain to the client why they were being put on hold?	☐
	Did I leave the client on hold for more than 1 minute?	☐
	Did I thank the client for holding when I retrieved the call?	☐
	Did I ask the client's permission to use a speaker phone?	☐
	Was I patient in listening to caller's needs and avoid interrupting?	☐
	Did I show respect for the client and not sound snobbish or speak like I was the only game in town?	☐
	Did I treat the client with mutual respect by not intimidating or using a condescending manner?	☐

WAS I POLITE?

- [ ] Did I use please and thank-you?
- [ ] Did I avoid using slang terms, soft obscenities and acronyms for real English?
- [ ] In closing, did I thank the caller for calling?
- [ ] Did I listen to their parting words and allow the client to hang up first?
- [ ] Did I escort the client out?

WAS I CONSIDERATE?

- [ ] Did I avoid judging people by their looks, clothes or appearance?
- [ ] Did I hold sensitive meetings or conversations behind closed doors?
- [ ] Did I use discretion in discussing client business by using the hold button on the phone, or conducting client business in private?
- [ ] Did I ask "May I tell him/her who's calling?" rather than "May I ask who's calling" to avoid the perception that I was screening the call?
- [ ] When I transferred a call, did I let the client know I was transferring them, give them the name and number of the person I was transferring to and introduce them live?

WAS I RELIABLE?	Did I read back messages to verify content and ensure all the pertinent information was taken?	☐
	Did I tell the client I would forward the message immediately or as soon as person returned?	☐
	Did I forward the message along within one hour of being taken?	☐
	Did I make a commitment and keep it?	☐
WAS I HONEST?	Did I tell clients when I was unable to take calls?	☐
	Did I admit not knowing the answer but offer to find out?	☐
	Did I make a promise of delivery knowing I would/could do it?	☐
	Did I ensure my information was accurate and complete so I did not answer in half-truths?	☐
WAS I ATTENTIVE?	Did I have eye contact, nod, smile or use a hand gesture to let the client know I would be right with them?	☐
	Did I avoid interrupting one client for another?	☐
	Did I excuse myself from one client when interrupted by another?	☐
	Did I begin service with a second client by acknowledging them and providing them with a report on when to expect service?	☐
	Did I treat the client with mutual respect? (their time is as important as mine)	☐
	Did I listen carefully without interrupting?	☐

	Did I avoid finishing sentences for them?	☐
	Did I make some listening responses to let the client know I was still there?	☐
WAS I EFFICIENT?	Did I have the knowledge I needed to solve the problem?	☐
	If I did not have the knowledge I needed, did I have a source of additional knowledge?	☐
	Did I have sufficient training in problem solving skills?	☐
	Did I listen carefully to what the problem was?	☐
	Did I avoid interrupting the client?	☐
	Did I guide the client to the information I needed by asking closed questions?	☐
	Did I take notes of important points?	☐
	Did I restate or paraphrase the main points to ensure a clear understanding of the problem?	☐
	Did I ask client for suggestions or alternatives for a possible solution?	☐
	Did I have a broad enough knowledge to offer suggestions or alternatives?	☐
	Did I, along with the client, select the best solution to their problem?	☐
	Did I advise the client as to what action I would take and when I would take it?	☐
	If I could not solve the problem, could I refer the client to the individual or source that could help them with their problem?	☐
	Did I give my name and number so the client could call back if they needed further help?	☐

DID I FOLLOW-UP?	Did I close off the service transaction by ensuring the chosen solution is in place?	☐
	Did I offer the client my name and phone number to refer to in case he required additional service?	☐
DID I GO THE EXTRA MILE?	Did I find a number of alternatives for the client?	☐
	Did I take risk and provide service in the spirit of a rule or regulation?	☐
	Did I exceed the client's expectations of service? Did they tell me so?	☐
	Did I ensure the accuracy of a referral by checking on the success of it?	☐
	Did I admit a mistake and make up for it by making it right?	☐
DID I PRESENT MYSELF PROFESSION-ALLY?	Did I meet my organization's and my client's expectations in my choice of dress?	☐
	Did I recognize the importance of my image and appropriateness to the client expectations?	☐
	Did I attend to my personal hygiene? Did I ensure my body (hair, fingernails, teeth) and clothing were clean?	☐
	Did I check the sensitivity to my cologne/perfume?	☐
	Did I use a pleasing tone of voice - assured and self confident but not arrogant?	☐
	Did I use appropriate language? Did I avoid soft obscenities and jargon in place of good English?	☐
	Did I smile, both in person and on the phone?	☐
	Did I display a positive attitude by showing concern, being helpful in providing opportunities or alternatives and leaving my troubles at home?	☐

CHECKLIST
FOR DEALING WITH
A DIFFICULT CLIENT

When you dealt with a difficult client during the course of your day, did you meet the following elements?

DID YOU ...

- let them talk? ☐
- acknowledge their frustration? ☐
- agree they may have reasons to be frustrated? apologise for the problem? ☐
- stay calm, avoid arguing by depersonalizing the problem? ☐
- avoid interrupting and wait for an appropriate time to speak? ☐
- guide the conversation to the problem at hand by asking relevant questions? ☐
- listen carefully to determine what the real problem is? ☐
- take notes of key items of conversation? ☐
- ask closed questions to clarify the problem if needed? ☐
- ask client for suggestions to possible solutions? ☐
- offer suggestions/alternatives? ☐
- use their input to select the best solution to their problem? ☐
- advise the client as to what action you will take and when you will take it if any is required? ☐
- ensure that the client didn't get "bounced" around the system? ☐
- thank client for calling? ☐
- follow up on the problem? ☐
- If you could not find a solution, did you take the clients name and number and have someone call them back? ☐

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His genuine interest in the recognition of our professionalism has been an inspiration.

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