

# Customer Service II: Customer Relationship Management



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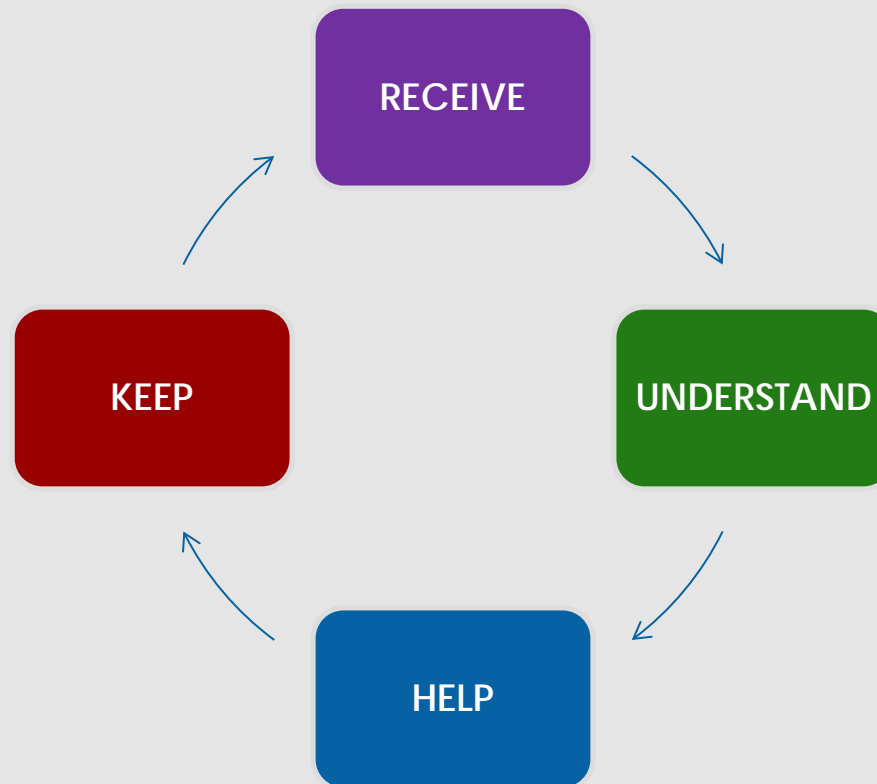
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# Customer Interaction Cycle

While you may have the basic transactional skills of good customer service, there are 4 steps that, if followed properly, could transform your skills from good to outstanding. These steps rotate in a customer interaction cycle and include: receive, understand, help, and keep.



# Receiving Your Customer

The **first step** in the customer interaction cycle is “**Receive.**” This step is about making your customers feel welcome and creating an atmosphere that tells your customers that they are your number one priority.

When receiving your customers, you should:

- Use open, inviting body language
- Personalize the customer’s experience
- Remember important facts about the customer

Receiving is also about showing your customers that you are ready to serve them by maintaining a level of eagerness and positive energy - meaning communicating with your customer regardless of their intentions to “buying” into or using your services. The receiving step should never end. It is a process that should continue throughout the interaction and/or relationship.

**Great customer experiences are those that espouse trust, convenience, and intelligence.**

**- Anthony Leaper**

# Understanding Your Customer

The **second step** in the customer interaction cycle is “**Understand.**” This step focuses on what the customers want and/or need. Not taking the time to understand your customers could cost you, the customers, and your agency time and, potentially, money.

Understanding your customers is essential to keeping your customers and managing your relationship. Don't assume you know what your customers are thinking. Talk to your customers and gather information first.

When communicating with your customers:

- Don't get distracted
- Paraphrase for clarification
- Don't rush the customers
- Put yourself in the customers' shoes

# Understand by Asking Questions

One of the best ways to get an understanding of a customer's request is by asking questions. There are various types of questions that could help you to uncover specific information.

Types of questions:

- **Open-ended questions** give the customer an opportunity to explain or elaborate. These questions use the 5 W's (who, what, when, where, why) and/or how? An example of an open-ended question is "What vision do you have?"
- **Open-opportunity questions** ask for the customer's personal view based on what has been presented. An example of an open-opportunity question is "How do you feel about this color scheme?"
- **Leading questions** are simple question which require a simple "yes" or "no" answer. These questions should be used sparingly as they do not provide much information. An example of a leading question is "Do we have an agreement?"
- **Probing questions**, otherwise known as follow-up questions, are used when you need more information than the previous response provided. An example of a follow-up question is "Could you tell me a little more about that?"
- **Emotional thermometer questions** are based on an observation made in the customer's body language or tone. An example of an emotional thermometer question is "You look confused. Would you like me to explain further?"

# Helping Your Customer

The **third part** to the customer interaction cycle is “**Help.**” Helping involves many things.

Helping may include:

- Setting realistic expectations
- Informing your customers of any restraints/barriers
- Present with possible time frames
- Pre-plan for unexpected obstacles

**Giving options** is an important part of helping your customers. Customers appreciate feeling included in the decision making process and the solution. This does not mean you let your customers dictate the outcome. Give customers control within reasonably set boundaries which gives them what they want while getting what you need.

**Setting an agreement** gives you the opportunity to paraphrase again while including any decisions made. In some cases, you will be required to sign a contractual agreement for legal purposes. These agreements will assist in avoiding confusion, disappointment, and other issues.

## Keeping Your Customer

The **last step** in the customer interaction cycle is “**Keep.**” After everything is said and done, you want your customers to know that you still value the relationship.

Though this is the last step, each step before makes keeping your customers possible. Once you have completed the interaction, you show that you are still invested in your customers by making the experience personal.

To show continued investment in your customers, you may:

- Open up for feedback
- Thank the customer
- Invite the customer to come back

**Do what you do  
so well that  
they will want  
to see it again  
and bring their  
friends.**

**- Walt Disney**