1.2 White Glove Model - How to Wow our customers

Call preparation

Learners will resolve the call-in systems using company best practices for notes and updates.

A successful call starts before the phone ever rings. Preparation is everything! It is recommended that you are logged into all the systems you may need to complete an interaction with a customer. Make sure that you are comfortable at your station (clean work area, seat properly adjusted, etc.) and that your headset is properly connected. Once you are ready to begin, get into queue!

Taking quality and informative notes during the call is essential to the customer's success and to your agent team. Notes will not only help the next agent to know what issues, processes, and solutions you went through with the customer, but it will also provide a record of the effort and experience you had with the customer. Note taking should be clear, concise, and informative, so that anyone reading the note after you will understand what you went through and completed on the customer's call.

- **This section needs to be built out for how to take proper notes, brand agnostic templates (if there are any), and could include the "email writing" course or another "business communication" course. If there is one facilitator that would like to develop this out, please volunteer.**

You will develop a system that works best for you, but be prepared to take notes from the onset of the call. Taking notes throughout the call will make you faster in completing the post call work, and helps you keep the calls separate in your mind.

Opening

Learners will open a call with a proper introduction.

The opening of a call should quickly establish the name of the company, your name and your intent to assist them. Keep it short and simple, like this: *"Thank you for calling live support, my name is **[name]**! How will I be assisting you today?"* Be sure to get the customer's name as well, so you can address them properly throughout the call. The opening sets the stage for the rest of the interaction, so having a positive upbeat tone is a must.

It sounds funny, but it has been proven true through many studies and a lot of research - if you smile while you make your introduction, the customer will hear it! Every call will be

Commented [1]: +sean.kelly@HostYo.com

Hey Sean, can you please provide the template you want the floor to use? If you put it in a Google doc and make set the "Share" to anyone within HostYo with a link" can view, it will be easy to socialize to all on the floor. Also, if you have anything else you want to add to this, please do. I would like to Wrap up this bit by EOD Monday.

Thanks!
Assigned to Sean Kelly

Commented [2]: Caller name:
Validation method: (Token, PIN, Last 4 of PW)
Callback number:
Issue:
Troubleshooting steps:
Results:
Additional information: (we could use this section to include any other necessary details such as trace routes info, sent documents/articles, etc)

Commented [3]: http://x.co/wanotes
or
https://docs.google.com/document/d/1MGUjWu4mvagrLnwjBmFV0QAWys6Lzu1wfCLV3qoAy1M/

Commented [4]: Thanks!

Commented [5]: Is this template for every call, regardless of whether it escalates or not?

Commented [6]: That is a great question! This is where I leave the room for additional information. Escalations should be mentioned in that area if anything of that sort occurs.

Commented [7]: I think what I will do is leave it as it is for the Foundations training and address escalation templates when we get into systems training.

Commented [8]: We say, "Thanks for contacting [brand], my name is ___. How can I assist you today?". Of course we deal with multiple brands though. However, Its key to NOT open the call like every other company with 0 personality. What drives us having great customer service is established right away with that intro. Its important to open that call with personality, and making the customer feel like we are ... [1]

Commented [9]: +christopher.banda@HostYo.com
Do you want to change how you greet to HostGator's way? With all the brands that we have, it would be easier to have one way to greet that was brand ... [2]

Commented [10]: interesting. So what would be an example?... for us, its: HostYo, hostmonster, justhost, and fast domain. Would would you be proposing if we adopted the host gator way? what would change?

Commented [11]: +christopher.banda@HostYo.com
I will email you.

Commented [12]: We just say "Thank you for calling live support, my name is [name]! How will I be assisting you today?" and no company name. What about y'all?

different, and some calls will be difficult, you will need to be able to quickly shake off difficult calls, reset your smile, and take the next call. You can't allow a previous difficult call influence the following calls.

Learners will use empathy from the beginning of the call through to the end of the call.

Empathy is defined as the ability to understand and share the feelings of another. It is arguably the most important skill to have as a web advisor. Empathy is an essential element of everyday relationships, and becomes even more prevalent when it comes to the company-customer relationship. Empathy is that bridge that we use to reach our customer where they are.

Using current empathy content here

Discovery

Learners will accurately analyze a customer's reason for call.

Sometimes, the reason a customer has contacted us may not be clear, even after the customer has explained it. For that reason, we as web advisors and customer experience experts must use questioning to be sure we have a clear understanding on the nature of the call. We typically use two types of questions: open ended and closed ended.

Open ended questions allow the customer to provide a longer more detailed answer. This type of question is best when we need a big picture of the issue, but may not need to focus on too many specific details just yet. Open ended questions prompt a conversation because they cannot be answered with just one word. (e.g. When did you first notice the error on your website?)

Closed-ended questions are those which can be answered by a simple "yes" or "no." The best use of closed ended questions is when you may think you are in agreement with the customer but just need to be sure. (e.g. Did you recently change your password?)

You will use what we call **Analysis questions.** Analysis is used for discovering why they are calling in, establishes that you are taking their call seriously, and are anxious to make sure they are heard. For instance, if they are calling in with a problem on their website, asking questions that provide steps to replicate the problem are most effective. If they are calling with questions about how to do certain things on their site, asking questions to understand what their goals of the site are will help you understand how they perceive their own goals and knowledge of how to attain them.

Some analysis questions could be:

- *"Is there a specific time that your site is unresponsive?"*

- *"Can you send email from another email account on the same domain?"*
- *"When did you notice that you were receiving a 500 error?"*

Best practice is to use a mixed blend of both open and closed ended questions to uncover the root cause of the issue and not just what was stated by the customer.

Learners will develop identity and opportunity questions to ask customers to find out their overall goals and interests.

Customer's call in for two reasons - they need help with an issue or they are exploring services that might help them reach a goal. Whether they have a tech issue or a goal issue, you will need to ask them questions. Part of discovery is not only having a good conversation, but to also glean information that will resolve their problem, help them with goals, or offer them opportunities to help them succeed. This is done by asking purposeful questions.

There are two forms of questions when it comes to discovery: identity and opportunity. Identity seeks information about why they have a website and what their goals are, and opportunity are questions that help reveal potential products or services that we can offer them.

Identity questions show a genuine interest in your customer's business/blog. Identity questions help you get to know your customer, what they do and why they do it. For example, here are a couple identity questions you could ask:

- *"What inspired you to start your business/blog?"*
- *"How long did it take you to get your business up and running?"*
- *"How would you describe your typical customer?"*

Opportunity questions help you control the call by focusing the conversation on what the customer wants to accomplish with their website.

- *"I heard you say that you don't get a lot of traffic, what do you know about Search Engine Optimization?"*
- *"How much time are you spending on learning how to build a site?"*
- *"How are you coordinating with the remote employees in your business?*

Keep in mind that natural curiosity is your best friend, just be sure to maintain a positive tone and a respectful environment. As you discover the customer's original issue, engage in small talk as a great way to make an interaction more human. Take the time out to get to know the customer and their goals. Not only will it help to keep the customer engaged while you are troubleshooting, it can also be a way of getting valuable information that could be referenced later in the interaction.

Learners will establish rapport and a relationship of trust with the customer.

Building trust is necessary for customer service. Maintaining trust is even more crucial for creating a memorable customer experience, which should always be the goal. There isn't a complicated formula to build that trust. Simply communicate your intentions to the customer, and follow through. Setting proper expectations is the glue that hold the customer's faith in your abilities to resolve their problem in place. So, how do you make sure that you always meet the expectation? Be mindful of what you promise to do.

A good rule of thumb is to under promise, but over deliver whenever possible. For instance, you have a customer with a technical issue that you think you have seen before. Full of confidence, you boldly declare that you will have it fixed in no time. The issue however ends up being a bit more complex than you initially thought or may fall out of your immediate scope of support. In that scenario an expectation was set but not met. Let's take the same example and look at it again. This time, instead of telling the customer you will definitely fix the problem, you say that you will exhaust all options you have to get it fixed. See the difference? One statement is guaranteeing that you will be able to fix something where the latter indicates that you will try everything you can, but doesn't promise a result. If you want to maintain trust, that is the best way: clear communication and met expectations.

- Add more content

Commented [13]: I think it may be good to put something here about statements for the agent to avoid while setting expectations with the customer. While the customer is explaining their issue it may be good to avoid statements such as "right", "uh-huh" and "yeah". These statements can project confirmation of the customers expectations when the agent may be unable to meet them. Even though they are usually used as "spot fillers" they can also project to the customer you may not be engaged or come across as disingenuous.

Consulting

Learners will recognize the customer audience and the level of technical speech that should be used during an interaction.

Always explain to the customer how you are resolving their issue. A big focus of ours here at Endurance is empowerment; teaching the customer how to use the technology as opposed to just fixing the problem. That can be a difficult task if we aren't speaking the customer's language. Yes, there is a lot of highly technical jargon that can be used, but let's not. When talking to a customer, use common language and full terms instead of acronyms. It's always best to paraphrase a solution in simple terms.

Learners will explain to customers' potential problems with their accounts and seek a resolution.

- Need content - one call resolution

Learners will recommend opportunities to improve the customer's website/business/experience.

When it comes to knowing what to recommend to the customer, you first have to be able to recognize the customer's needs and how we can help them. We call these needs "pain points" or "triggers." When identifying a trigger, you will want to do three things: look, listen and consider.

In order for you to learn as much as possible about a customer's business, you should exhaust all the resources that are available to you like the customer's account, their website, various DNS tools, etc. There may be some visual cues you will discover that lead to a product/service solution. Best practice is: if the customer has a website, look at it EVERY TIME!

Listening involves more than just what is being said. It also includes what is not being said. Good listening is easier and more effective when you allow a genuine curiosity to guide the conversation. Continual interest in the customer's business should be a quality that you should seek to develop.

When you take the time to consider, you are putting all the information together to determine if there is a solution we can offer that will empower the customer to reach a goal or avoid a future problem they might encounter. Customer success means that we do our part to help prevent problems and it starts with recommending the right solution. You may also want to consider things that would not make your potential recommendation a good fit for the customer

Commented [14]: This is a great call out. I would add an example in the actual training.

Commented [15]: Will do!

Review

Learner will repeat back to the customer the issue, the solution, and any offers upon completion of the call.

Once you have completed your troubleshooting and presented any recommendations to the customer, you will want to give them a recap of all that you did. Here's an example of how: *"Okay **[customer name]**, you called in today about **[reason for call]**. We were able to resolve that for you today by doing **[troubleshooting steps]**. We also talked about **[recommendations]**. Was there anything else you wanted to take care of today?"*

In that statement, you should notice that we ask the customer if there is anything else. The reason for doing so is simple - Customer Experience! Customers appreciate when they are able to get multiple issues addressed in a single call. They are business owners afterall, and probably have a ton of things to get done, and our goal is to make things easier for them. Even if a customer said they only had one focus for the call when it started, still ask at the end, they may have thought of something else.

Learners will review any billing changes to the customer's accounts and results of billing changes.

This may not apply to every call, but should you have to make any billing changes, be clear in communicating those changes to the customer before the call ends. For instance, let's say that you changed a customer's renewal cycle. You may want to say something like: *"Just as a reminder, we also changed you billig cycle. Your next bill will be due on* ***[date]*** *in the amount of* ***[amount due]****."* Always ask if the customer has any questions about the change prior to ending the call.

Close

Learners will close the call with their names and a request to take the survey.

Once the problem has been resolved, you should ask if there is anything else the customer needs assistance with, thank them for their time, restate the company/department and request that they complete the survey.

Here is an example: *"Was there anything else you wanted to take care of today?* ***(wait for a response and address any new concerns that come up)*** *In that case, thank you for contacting live support. My name again is* ***[name]*** *and it has been my pleasure to assist you today. We hope that you had a satisfactory experience and we look forward to working with you in the future. If you wouldn't mind staying on the line, there will be a brief survey. Have a great day!"*

Learners will prepare for the next call and understand what are acceptable behaviors between calls.

That's it! You just completed a call, so what should you do next? The few minutes you have in between calls is a good time to make sure that you have properly notated the call and tied up all other loose ends (this will be covered later). This down time is also perfect for resetting your energy, which is necessary after a difficult call.

- **Content needed here. Should be about last notes, closing resetting their work station, and preparing for the next call.**

Page 1: [1] Commented [8]	Christopher Banda	1/31/19 2:32:00 AM

We say, "Thanks for contacting [brand], my name is ___. How can I assist you today?". Of course we deal with multiple brands though. However, Its key to NOT open the call like every other company with 0 personality. What drives us having great customer service is established right away with that intro. Its important to open that call with personality, and making the customer feel like we are here to take care of them; all with how we greet them in the first 5 seconds of the call.

Page 1: [2] Commented [9]	Rick Jacobs	2/8/19 8:20:00 PM

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Do you want to change how you greet to HostGator's way? With all the brands that we have, it would be easier to have one way to greet that was brand agnostic, and can help with some brands where they don't know which brand someone is calling in with if they have multiple accounts on different systems.