HostYo

Module 1: The Customer Experience

Business name was changed to be used in this portfolio

v2019.07.29

Contents for Facilitators

The Customer Experience 4
Customer Service the HostYo way 4
How to talk to our customers 12
White Glove Model 26
Empathy, ownership, and apologizing 30
The "How to wow" process 46

Table of Contents

The Customer Experience **5**
Customer Service the HostYo way 5
Activity: Discover our Customers 11
How to talk to our customers 13
Phone Etiquette basics 13
Activity: Phrasing 19
White Glove Model
- "How to Wow" our customers 27
Activty: Professional Communication 33
Empathy, ownership, and apologizing 35
Activity: Empathy/Ownership Statements 41
Activity: Write an Apology 45
The "How to wow" process 47
Activity: say your opening 49
Activity: Fishbowl 57
Activity - Consultation 63
Activity: Role Play 69
Activity: QA Call-ibration 71

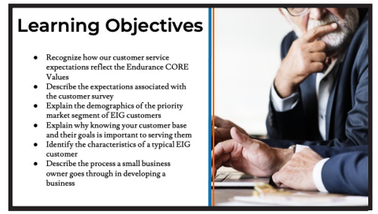
The Customer Experience

Customer Service the HostYo way

Lesson Objectives -

By the end of this section, learners will be able to:

- Recognize how the HostYo CORE Values set the underlying reason for customer service expectations.
- Describe the expectations associated with the customer survey.
- Learners will explain the demographics of the priority market segment of HostYo customers.
- Learners will explain why knowing your customer base and their goals is important to serving them.
- Learners will identify the characteristics of a typical HostYo customer.
- Learners will describe the process a small business owner goes through in developing a business.
- Use proper phone etiquette to ensure customer satisfaction (Hold, Transfer, etc.)
- Use a Tone of Voice that communicates interest and sincerity
- Cite the phrases that we prefer during customer interactions (Do's)
- Cite the phrases that we avoid during customer interactions (Don'ts)
- Position in a customer centric manner
- Learners will resolve the call in systems using company best practices for notes and updates.
- Learners will open a call with a proper introduction.
- Learners will use empathy from the beginning of the call through the end of the call.
- Learners will accurately analyze a customer's reason for call.
- Learners will develop identity and opportunity questions to ask customers to find out their overall goals and interests.
- Learners will establish rapport and a relationship of trust with the customer.
- Learners will recognize the customer audience and the level of technical speech that should be used during an interaction.
- Learners will explain to customers' potential problems with their accounts and seek a resolution.
- Learners will recommend opportunities to improve the customer's website/business/experience.
- Learners will repeat back to the customer the issue, the solution, and any offers upon completion of the call.



The Customer Experience

Customer Service the HostYo way

Welcome

Over the course of your new hire training, we will be discussing our customer experience. Customer experience is the first block in a foundation of helping our customer's succeed in their goals and is the foremost important aspect of your job duties. We will be integrating the lessons learned here throughout training and reinforcing these principles in a lot of our activities.

Our Values

Earlier we discussed HostYo's Five core values. Now, we are going to focus on the value *customer success*, which we define as:

> *"Every decision we make is driven by an unwavering commitment to helping our customers succeed. Their success is our success."*

We refer to the providing of this as "customer service."

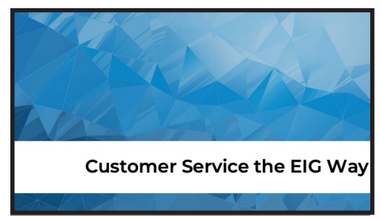
- Learners will recap any billing changes to the customer's accounts and results of billing changes.
- Learners will close the call with their names and a request to take the survey.
- Learners will prepare for the next call and understand what are acceptable behaviors between calls.

Materials

- Projector/TV
- Computer
- Mouse or clicker
- Necessary cables
- Note pads and other materials as specified in activity boxes

Welcome

Over the course of your new hire training, we will be discussing our customer experience. Customer experience is the first block in a foundation of helping our customer's succeed in their goals and is the foremost important aspect of your job duties. We will be integrating the lessons learned here throughout training and reinforcing these principles in a lot of our activities.



Our Values

Earlier we discussed HostYo's Five core values. Now, we are going to focus on the value *customer success*, which we define as:

> *"Every decision we make is driven by an unwavering commitment to helping our customers succeed. Their success is our success."*

We refer to the providing of this as "customer service."

Importance of Customer Experience

Ask: *Why is customer experience SO important?*

Open up a conversation and take all answers.

Discuss their responses.

The Importance of Customer Experience

Why is customer experience SO important?

What are some good customer experiences you've had?

What are some bad customer experiences you've had?

Facilitator Notes - Large group discussion

Create a flip chart that has two columns, one side for positive and one side for negative experiences. Start by asking for negative stories first. As participants tell their stories, write them on the flip chart to highlight the specific behaviors that led to the experiences. Probe to lead participants to talk about the main components of customer service (which they haven't been taught yet): building a relationship and resolving the need.

Ask: *"Think about the best and worst customer service experiences you have ever had. This experience can be in any type of industry (e.g. call center, restaurant, retail, hotel, airplane, etc.)."*

Begin the discussion by asking the class to share stories about negative customer service experiences they have had. List character traits from each experience.

Then ask for good customer service experiences. List character traits from each experience (i.e. Patient, Attentive, Friendly, Genuine, etc.).

Usually classes will remember more negative customer service experiences. Use this as a point of discussion on why customer service is so important.

Who are our customers?

Discussion Summary

- Our customers are small to mid-sized businesses
- We have customers all over the globe
- We aim to be a "one stop shop" for all of our customer's needs
- Our customers range from beginners to web and marketing professionals
- "Discover our customers" activity

HostYo fuels millions of small businesses worldwide with products and technology to vitalize customers' online web presence, email marketing, mobile business solutions, and more. Every decision we make comes back to finding new ways to give small business owners the tools they need to get online and grow. That unwavering focus is what's helped us grow to over 5 million customers around the world. And we're just getting started.

Every customer is different, and will likely have a unique approach to accomplishing their specific business goals. We as support agents

Who are our customers?

HostYo fuels millions of small businesses worldwide with products and technology to vitalize customers' online web presence, email marketing, mobile business solutions, and more. Every decision we make comes back to finding new ways to give small business owners the tools they need to get online and grow. That unwavering focus is what's helped us grow to over 5 million customers around the world. And we're just getting started.

Every customer is different, and will likely have a unique approach to accomplishing their specific business goals. We as support agents are able to help them best when we have taken the time to identify the milestones that each customer is wanting to reach. Getting to know the customer and the end goal for their business helps HostYo accomplish their goal as well. After all, customer experience is our primary mission. That means that we must get to know each and every customer, so that we can see things through their lens.

Small business experience

HostYo aims to be the one stop shop for business everywhere. That means that our typical customer can range from a novice WordPress user, all the way to the established online experts. However, we have, as a company, typically focused on the small to mid-size business, with a lot of our customers being first-time web hosting users. We want to be their one stop shop for everything they need to start a business, develop, and become successful with their goals.

No matter where a customer may fall in terms of experience, there's one thing they all have in common: they own or are in the process of developing a business or brand. There are numerous steps in developing a business, we will just focus on some of the key steps that every business/brand owner must go through. First, every business owner must have an idea! Once that is out of the way, it's time to start thinking of the target audience, and how to market to them. At this point, establishing an online presence should be the focus. Of course there's plenty of legal and financial aspects of building a brand that all business owners encounter as well. Our customer's journey is a long and challenging one for sure, so we aim to take some of the work off their plate, with our innovative technology and empathetic support.

are able to help them best when we have taken the time to identify the milestones that each customer is wanting to reach. Getting to know the customer and the end goal for their business helps HostYo accomplish their goal as well. After all, customer experience is our primary mission. That means that we must get to know each and every customer, so that we can see things through their lens.

Small business experience

HostYo aims to be the one stop shop for business everywhere. That means that our typical customer can range from a novice WordPress user, all the way to the established online experts. However, we have, as a company, typically focused on the small to mid-size business, with a lot of our customers being first-time web hosting users. We want to be their one stop shop for everything they need to start a business, develop, and become successful with their goals.

No matter where a customer may fall in terms of experience, there's one thing they all have in common: they own or are in the process of developing a business or brand. There are numerous steps in developing a business, we will just focus on some of the key steps that every business/brand owner must go through. First, every business owner must have an idea! Once that is out of the way, it's time to start thinking of the target audience, and how to market to them. At this point, establishing an online presence should be the focus. Of course there's plenty of legal and financial aspects of building a brand that all business owners encounter as well. Our customer's journey is a long and challenging one for sure, so we aim to take some of the work off their plate, with our innovative technology and empathetic support.

Activity next page.

Activity: Discover our Customers

Your facilitator will provide you with a link to a document with 30 websites. You will have 15 minutes to take notes on two of the sites. At the end of the 15 minutes, you will present the site you researched, discuss how you got the information, and what questions you would ask a customer to start a conversation.

Who the customer is:

What they sell:

Who their client base seems to be:

Any other information you can glean from the site that could be helpful to starting a conversation with them:

Activity - Discover our customers - 60 min

Provide the learners with one or two websites each of HostYo customers that we know are on our systems.

This link connects to a document with 30 websites. these are prone to changing so make sure they are updated or you are aware of their status before assigning them.

https://docs.google.com/document/d/1F7fyl2EolmiZx3zKi44nswelc-2iF8-vNXfN5-e6S5o/edit

Give each learner 15 minutes to take notes on the site:

- who the customer is
- what they sell
- who their client base seems to be
- other information they can glean from the site that could be helpful to starting a conversation with them

At the end of the 15 minutes, each learner will present the site they researched, discuss how they got the information, and what questions they would ask a customer to start a conversation.

How to talk to our customers

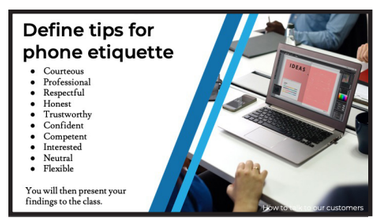
Discussion Summary

- Phone etiquette
- Hold and transfer policy
- Phrasing - one activity
- Tone of voice - two videos

Phone Etiquette basics

Activity - Define each of the tips

- Add the word "Be" before each of the 10 tips when listing them verbally.
- Ask folks to work alone or in pairs to define ONE tip.
- Give them 2 min to discuss their definition.
- Go around to each pair and ask for their definition.
- Add to their definition or clarify based on the information below.



1. *Be courteous* - Agents should always treat each caller with courtesy. Ask how they prefer to be addressed, make every attempt to pronounce their name correctly and use this name consistently. Talk with a smile, remain calm and speak clearly. Wait for the person to finish speaking before speaking. These simple tips will go a long way in interacting with the caller in a positive and professional manner.

How to talk to our customers

Phone Etiquette basics

1. *Be courteous*

2. *Be professional*

3. *Be respectful*

4. *Be honest*

5. *Be trustworthy*