



Customer Service Specialist Level 3

Overview





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A customer service specialist is the 'professional' for direct customer support within all sectors and organisation types. They are advocates of high quality customer service, who act as a referral point for dealing with more complex or technical requests, complaints and queries.

They are experts in the organisation's products and service offer and would work collaboratively with other departments and colleagues to share knowledge as an expert in their field.

Key responsibilities may include:

- Dealing with complex customer queries
- Working collaboratively with other departments and colleagues
- Providing expert knowledge to internal and external bodies
- Use of organisational and generic IT systems

Benefits



Gaining key skills to support effective customer communication and build relationships



Understanding how to apply a range of leadership styles in a customer service environment



Becoming competent with handling customer challenges and how to resolve



Ability to recommend and implement improvements to service

Suitable for:

Individuals across all sectors, environments and organisation types, with scope to influence change and improvements in service.

Programme delivery

Programme length

15 months (on average) plus End-point Assessment (EPA).

Delivery method

Programme delivered through Lifetime's blended learning approach.

Blended learning

Facilitated learning: Learners complete learning sessions with their Lifetime Learning Coach every 4-6 weeks.

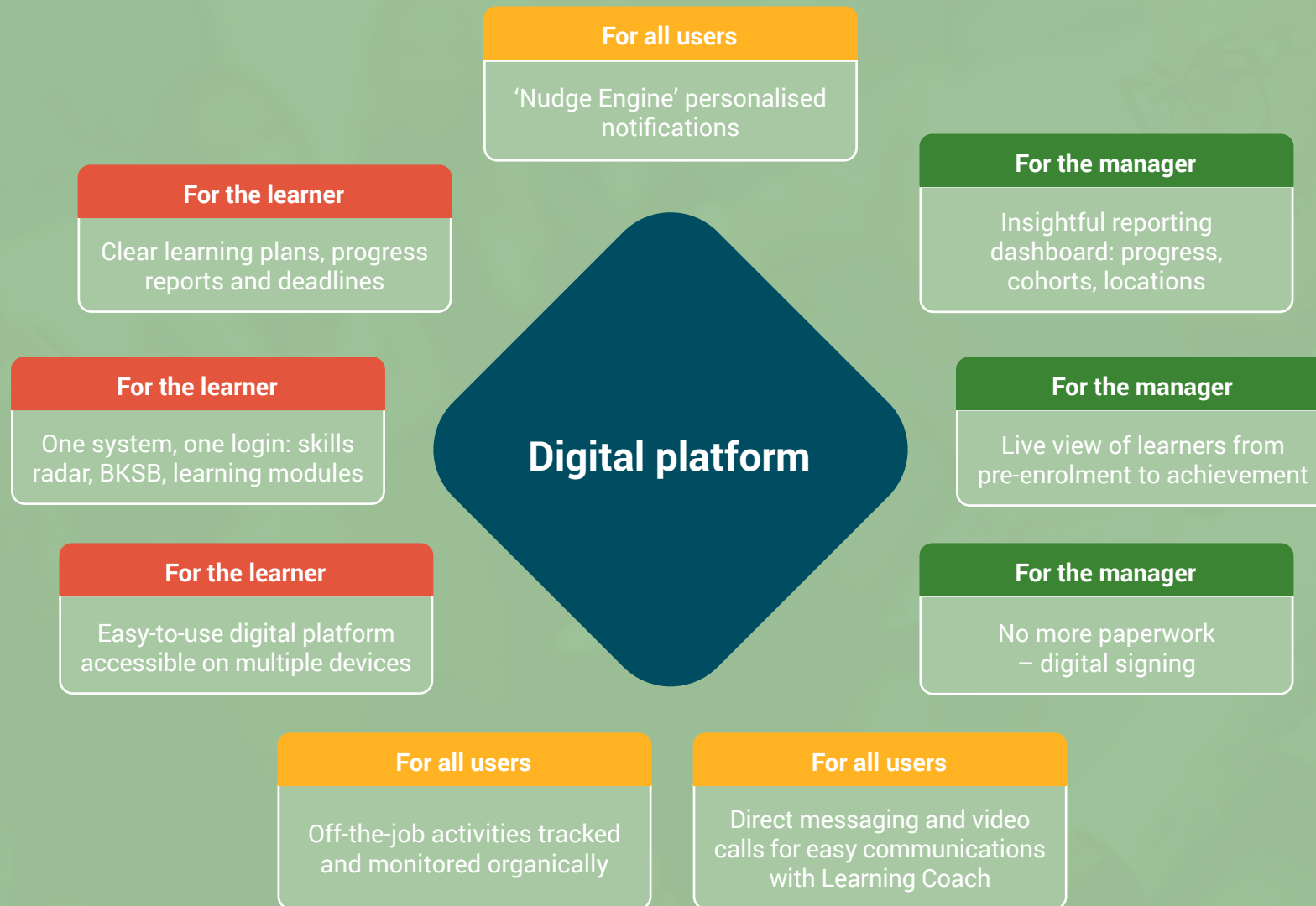
Self-study: Learners are expected to carry out self-study using Lifetime's online learning platform.

Virtual sessions: Carried out between the Learner and their Lifetime Learning Coach.

Contact: Learners have access to their Lifetime Learning Coach via email, phone and online learning platform.



Blended delivery through Lifetime's online learning platform



Programme modules

The delivery model is broken down over 12 topics:

1. Customer Insights

2. Providing a Positive Customer Experience

3. Customer Service Performance

4. Customer Journey

5. Ownership and Responsibility

6. Working with Customers

7. Business Focused Service

8. Culture and Environmental Awareness

9. Develop Self

10. Team Work

11. Equality, Diversity and Inclusion

12. Career Development



**Programme
modules
Deep dive**



Customer insights

Covered:

- Internal and External Customers
- Customer Profiles and Types
- Customer Emotions and Expectations
- Continuous Professional Development (CPD)
- Loyalty, Retention and Satisfaction
- Customer Data

Dig Deeper:

Empathetic Listening



Customers will come to your organisation from a wide variety of different backgrounds and so will have different cultural expectations of your service. Knowing how this could impact on you and your organisation will be an essential part of providing a good customer experience.

As people are influenced by many things such as, the way they are brought up, their values and beliefs, where they live, their nationality, the language they speak, their education, their religion, the customs and traditions they follow etc. All of these cultural factors could have an impact on what a customer expects from your service.

An example of cultural differences is customer's expectations regarding the way of being in a service context. Japanese people traditionally prefer to stand at a length from one another with no physical contact between people while they are talking unless they are in formal social situations. This would mean that they are likely to prefer you to make a certain amount of personal space between you both when talking. This contrasts with people from Latin American countries who tend to have a lot more personal space between people when talking and who consider the thing as a more social and enjoyable experience. This situation means that you should find a way of balancing a conversation during a consultation.



The Difference Between Customers, Wants, Needs and Expectations

The difference between needs and wants
 The difference between wants and needs
 The difference between needs and expectations

Customer	Want	Need	The difference
1.			
2.			
3.			

Providing a positive customer experience

Covered:

- Questioning and Active Listening
- Clear Communication
- The Highs and Lows
- The Power of Influence
- Cost Conscious Mindset

Dig Deeper:

The Negotiation Matrix



CUSTOMER SERVICE SUMMARISING & REINFORCING

Summarising & Reinforcing

Summarising

There's something about summarising that makes you an effective leader. It's about a firm grasp of the essence relating to your colleagues about the new situation you were in at the weekend. During the conversation you will share the high demands of your experience to give your friends the key data to help them build a picture of what you do.



This method of summarising is a critical thinking skill

The idea here is to take a large block of information, and instead of trying to re-remember the exact details, you do a much more concise job of summarising, and understand, confirm or remember what has been said.

It is in the same process we use when summarising with a customer. You only give what is relevant to what they need to know, but we can also confirm that we have understood the customer's needs, wants and expectations along the way. You can see they might have:

... you have summarised details for a customer. What did you say and how did the customer respond?

LEADERSHIP & MANAGEMENT LEVEL 4 & 5

Empathic Listening

We'll use an example of a Supermarket to help. The 7 levels of empathy for your customers are a guide of how a leader should 'think' when understanding their to be understood. (Covey, 2001, pp. 210-211). Copyright 2001, used as an example of the 'levels of empathy' for the 'Supermarket' to help you to see a variety of ways to use a business, and to see what the 'levels of empathy' are and how to use them to help you to see the 'levels of empathy'.

According to Covey, there are five levels of listening, as shown in Figure One below:

Figure One - Five levels of listening (Adapted from Covey, 2001, pp. 210)



01 **Empathic Listening** - The listener listens with the intent of understanding the speaker as opposed to focusing on their own needs.

02 **Perceptive Listening** - The listener does not listen to the speaker, but listens to their own needs and wants for the speaker.

03 **Selective** - The listener is only listening to parts of what the speaker says.

04 **Preempting** - The listener does not listen to the speaker, but instead focuses on their own needs and wants.

05 **Ignoring** - The listener is not listening at all.



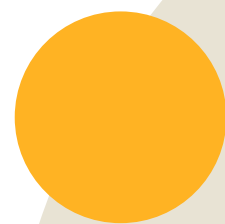
Customer service performance

Covered:

- Challenging and Complex Situations
- Maintain Positive Relationships
- Limits of Authority

Dig Deeper:

Social Media



BE ABLE TO DEAL WITH CUSTOMER COMPLAINTS HANDOUT AND ACTIVITY

For each step in the program's CRM system to manage all complaints.

Offering quality of service to customers is the best way to help you grow and succeed in your market. When you give a customer the sense that you have the ability to implement it, this will depend on your individual operations policies and procedures. Remember that you will need to balance the advantages and limitations of each solution.

For example, solutions and the limits of authority:

CUSTOMER SERVICE COMPLAINTS PRESENTATION AND PROCEDURES

Complaints Process and Procedures

Develop a complaint from a customer's standpoint using a first response. It is a critical time to resolve the problem. The complaint will provide the opportunity to let your customer know you will do the right thing for them in the future. Long will be the long run. Be sure to use the opportunity to gain a customer's feedback.

Check that your operations complaint process meets the standards and document your findings in the table provided.

1. Be clearly communicated and explained to all staff.
2. Inform the customer of what they need to do to resolve the issue.
3. Resolve the and clearly communicate to customers.
4. Provide the details to the customer to ensure the issue is resolved.
5. The information to be resolved the complaint.
6. Provide and inform customer of progress at every stage.

As a complaint process and use programs in the future to ensure that customer feedback is used to improve you, other customer related and strategic.

Name of your policy/procedure/standard	Findings/Comments
1	
2	
3	
4	
5	
6	

Language that Reinforces Empathy with Customers v1 (FR2102)

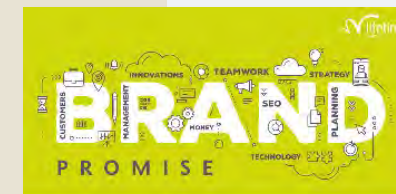
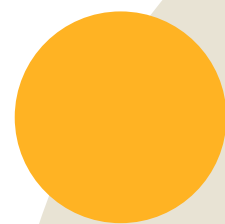
Customer journey

Covered:

- The Customer Journey
- Service Level Agreements
- Specialist Referrals
- Business Processes
- Customer Focus

Dig Deeper:

Service Mark



A brand promise in its simplest form is a way for an organisation to tell their customers what they can do for them. It provides an opportunity to share their special feature or service that they can provide and beyond their competitors.

It's not enough for the organisation to make their brand promise. This information needs to be shared and through all the touchpoints of the business, all the ways that when this message is shared, it can be seen & give the customer a positive experience.

To be successful, it's not just about what you promise, it's about how you deliver it.

1. BELIEVE IN YOUR ORGANISATION
2. SHARE YOUR VALUES & UNIQUE MESSAGE
3. TRUST IN YOUR PRODUCTS & SERVICES

Identify all the touchpoints that you promise to use. Why do you use them and how do you ensure you are consistent in your findings.



Ownership and responsibility

Covered:

- Personal Commitment
- Maintaining Customer Satisfaction
- Pro-activity and Creativity
- Successfully Resolve Issues
- Deliver on your Promises

Dig Deeper:

The Importance of Going Off Script



Communication is the process whereby a message is transmitted by various methods to the receiver. The receiver then has to decode that message in order to understand it, interpret its meaning and then formulate a response.

This is best represented by Aristotle's Communication Cycle:

Customer Satisfaction: Activity

Describe a time when you have resolved a customer issue or problem.

For how long have you managed these expectations to ensure if you're your organisation satisfied?

Managing Customer Expectations v1 (FR4882)

This is taking too long... I'm not coming back here again...

TICKET

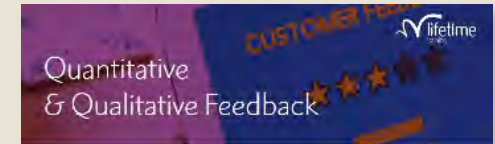
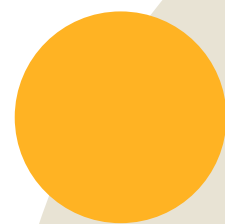
Working with customers

Covered:

- Gather Customer Feedback
- Analyse the End-to-End Experience
- Recommendations and Implementation
- Legislative Responsibilities

Dig Deeper:

The PDCA Cycle (Plan-do-check-act)



QUANTITATIVE FEEDBACK

Quantitative feedback enables you to interpret the data statistically, you can make mathematical judgements about the data. This is what you would typically see:

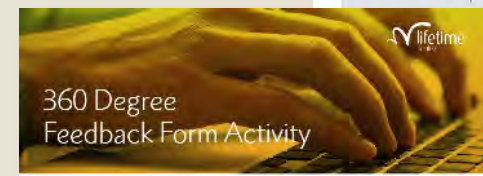
- ⊗ Trying to identify patterns in a set of data
- ⊗ Using the law of averages to certain statistics or
- ⊗ Determining the value in a feedback questionnaire

This approach is used because it can provide you with objective information to understand what has occurred or what will occur. Below is an example of a question which provides quantitative data:

Please rate Company XYZ's level of customer service

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Excellent



This activity provides 360 degree feedback, a highly respected form of gathering differing views, the greater the number of responses:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

DESIGNING THE FEEDBACK FORM

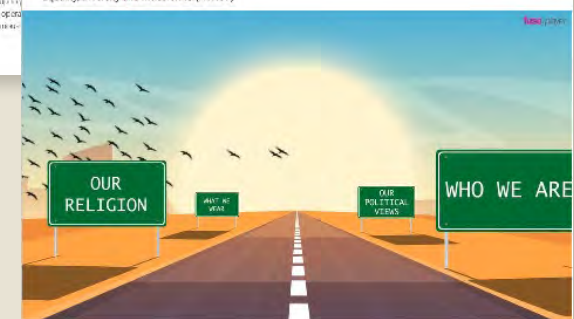
The process of designing the feedback document essentially a questionnaire to build from the needs of your users. Unless the feedback is anonymous, it is essential to use it as a tool to improve your service, not as a tool to punish or reward. Therefore, to make the performance, i.e. give feedback in respect of the person's conduct.

The question is not one of being able to be a person who is able to cope with, and do the most benefit from, options. Some people do not support going back to a manager or criticism from a named person.

Qualitative feedback is one you to interpret the information by using the words of the survey. It is often used to provide more context to the quantitative data. For instance, it will often become the most valuable collection for you.

It helps in uncovering the motivations, attitudes, behaviour and needs. It helps you to understand the reasons why you are not where you want to be, and it helps you to understand the reasons why you are where you are. Qualitative data is often used to provide context to the quantitative data.

How do you rate your customer service?



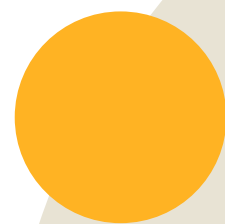
Business focused service

Covered:

- Business Strategy
- Leadership Styles
- Continuous Improvements
- Identifying and Negotiating
- Service Options
- The Impact of Your Role

Dig Deeper:

Porter's Five Forces



Net Promoter Score
Discover what your customers really think.

WHAT IS IT?
NPS is a simple, powerful metric for gauging customer loyalty and predicting growth. It is calculated by subtracting the percentage of detractors from the percentage of promoters.

HOW DOES IT WORK?
Simply you need to ask customers how likely they are to recommend your product, service, or organization on a scale of 1 (lowest) to 10 (highest). Customers who score 9 or 10 are called "promoters", those who score 7 or 8 are called "passives", and those who score 6 or below are called "detractors".

STEPS TO USE THE NET PROMOTER SCORE:

1. Define Your NPS
2. Calculate Your NPS
3. Make Improvements

PESTLE
PESTLE is a strategic analytical framework. It is used by businesses to provide analysis of internal and external factors that impact their operations.

Political: Government policies, regulations, and political stability. Changes in government can impact business operations.

Economic: Inflation, interest rates, and economic growth. Economic downturns can reduce consumer spending.

Social: Demographics, culture, and social norms. Changing demographics can affect market demand.

Technological: Innovation, automation, and digital transformation. New technologies can create opportunities and challenges.

Legal: Laws, regulations, and industry standards. Compliance is essential for business success.

Environmental: Climate change, natural disasters, and sustainability. Environmental factors can impact supply chains and operations.

ILM - Video - Vision, Mission, Strategies and Objectives

A just world without poverty

Culture and environmental awareness

Covered:

- Organisational Structure
- Business Culture
- Internal and External Factors
- Compliance
- Industry Best Practice

Dig Deeper:

Sharing Knowledge and Best Practice



It's not so simple as saying 'it's a team' or 'we're working very well together' and they all seem to be very unappreciative. After speaking to some of the team they have expressed that it is a case of 'they' that all managers want to do is that the team will have some beliefs and values. He doesn't really understand what this means and he has managed to get the team to have a 'positive culture' in the team for a long time.

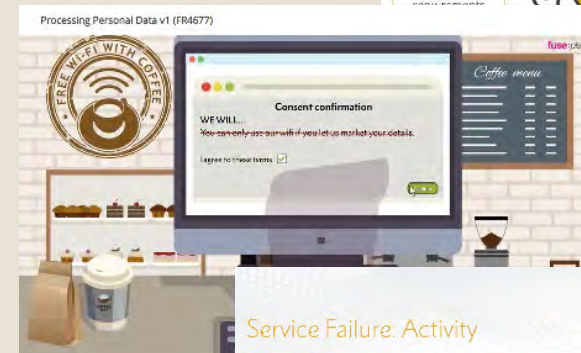
It's a great sign that the team is open to change and willing to know the individuals in order to develop the culture of the team. So, what does this mean?

Organisational Culture
 Usually, culture can be defined as 'the way things are done around here'.
 Many organisations will have 'the way of doing things' which can be influenced by a wide range of factors such as:

- Fast & current Policy
- The economic climate
- The environment
- Internal and external audience
- The individuals within the team
- Performance indicators

of work

costs depending on the requirements of the organisation
 and the availability of resources. That is, the cost can be reduced by improving the process and motivation of



Service Failure: Activity

Potential Service Failure	Potential Consequences	Improvement
The client has a bad experience	Reputation damage, loss of customer loyalty, loss of employees and loss of profits	Repeat the environment that could be made to prevent the service failure occurring

Develop self


Covered:

- Personal Goals and Target Setting
- Developing Your Skills
- Creating a PDP (Personal Development Plan)
- Progressing Your Career

Dig Deeper: Self Evaluation



PERSONAL DEVELOPMENT & CAREER PLAN



Personal Development & Career Plan

Where am I now and how can Lifetime help me get to where I want to be?

Working on your personal development can help you manage your focus on your skills as a caregiver and take responsibility for your own skills and development. It is primarily about assessing your own skills, setting goals for improvement, and taking your own initiative and taking on your own career. The plan helps you define those goals and help you identify your strengths and areas for development and how you work through these during the course of the programme.

Complete the following questions and discuss your answers with your tutor or trainer:

When are you? (Of your current skills, education, etc.)

Why are you motivated and reasons for doing this course are?



What do you like most/least about your job? What are your hopes and dreams?

What are your short-term career goals (within the next 6 months)?

What are your mid-term career goals (within the next 12 months)?

SMART Targets v2 (FR1918)

Achievable



The target you set must be challenging but achievable. How will you know if it is achievable? Here are a few tips to look out for:

CUSTOMER SERVICE HOW TO UPDATE YOUR KNOWLEDGE



How To Update Your Knowledge

It is vital that we all keep up to date with our knowledge and skills. It might be that there has been an update to the manual, a new process for taking patient orders or changes in law that affect the limits of your authority. Without keeping up to date it could affect your ability to provide information which is all a very important aspect of your customer's experience.

Activity

Once you have read the articles and shared your thoughts with your peers, complete the following questions. How do you keep your knowledge up to date in your role?

Identify two areas of training you think would be most valuable for you to take in the next 6 months.

Team work

Covered:

- Team Collaboration
- Sharing Best Practice
- Adaptable and Flexible
- Team Dynamics
- Team Roles

Dig Deeper:

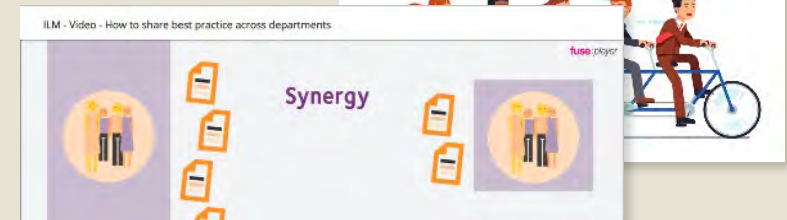
Team Motivation



Building Trust With & Across Teams

Trust is a common word, but what does it mean in a work context?
For instance, can you trust your colleagues' decisions? Do you trust other departments to do what they say?
Do you trust the financial department to accurately report your company's performance?
Do you trust the HR department to be fair when they are disciplining staff? What about your boss, your colleagues, or your peers?
What are the signs that you can trust your colleagues? How do you work together to build trust? You have the opportunity to explore these questions and you can work securely, knowing that your colleagues will support you in your work.

ABOUT TRUST
According to researchers, Denise Rousseau, Jim Lounsbury, Ronald Burt, and Colin Lerner trust in the workplace is a complex phenomenon that is shaped by a variety of factors, including the nature of the relationship, the expectations of intentions or behaviors of others within the team.
Ultimately, this means that an individual only trusts those who they know that others will support them and be there for them, even when the individual has a vested interest in the relationship, for example with your family, friends, work colleagues, or your suppliers.



ILM - Video - How to share best practice across departments

Synergy



Facilitating Cross Team Working Activity

Describe the challenges of cross team working.

Describe the benefits of cross team working.

Select two approaches that help facilitate cross team working and describe their effectiveness.

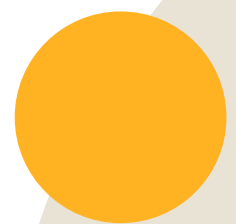
Equality, diversity and inclusion

Covered:

- Positive Impact
- Supporting Equality and Diversity
- An Inclusive Working Environment
- Values and Beliefs
- Brand Advocacy

Dig Deeper:

Volunteer Days



Understanding British Values v1 (FR5640)



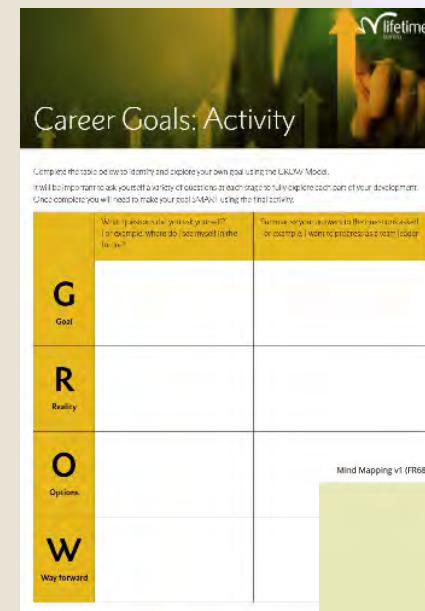
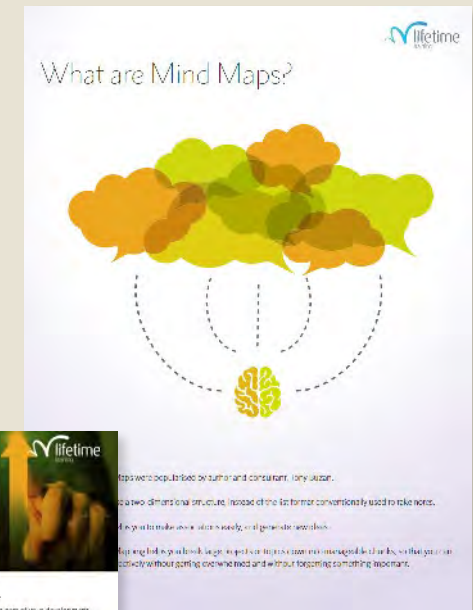
Career development

Covered:

- Goal: What do I want to achieve?
- Reality: Where am I now?
- Opportunities: What's out there for me?
- Way forward: What am I going to do about it?

Dig Deeper:

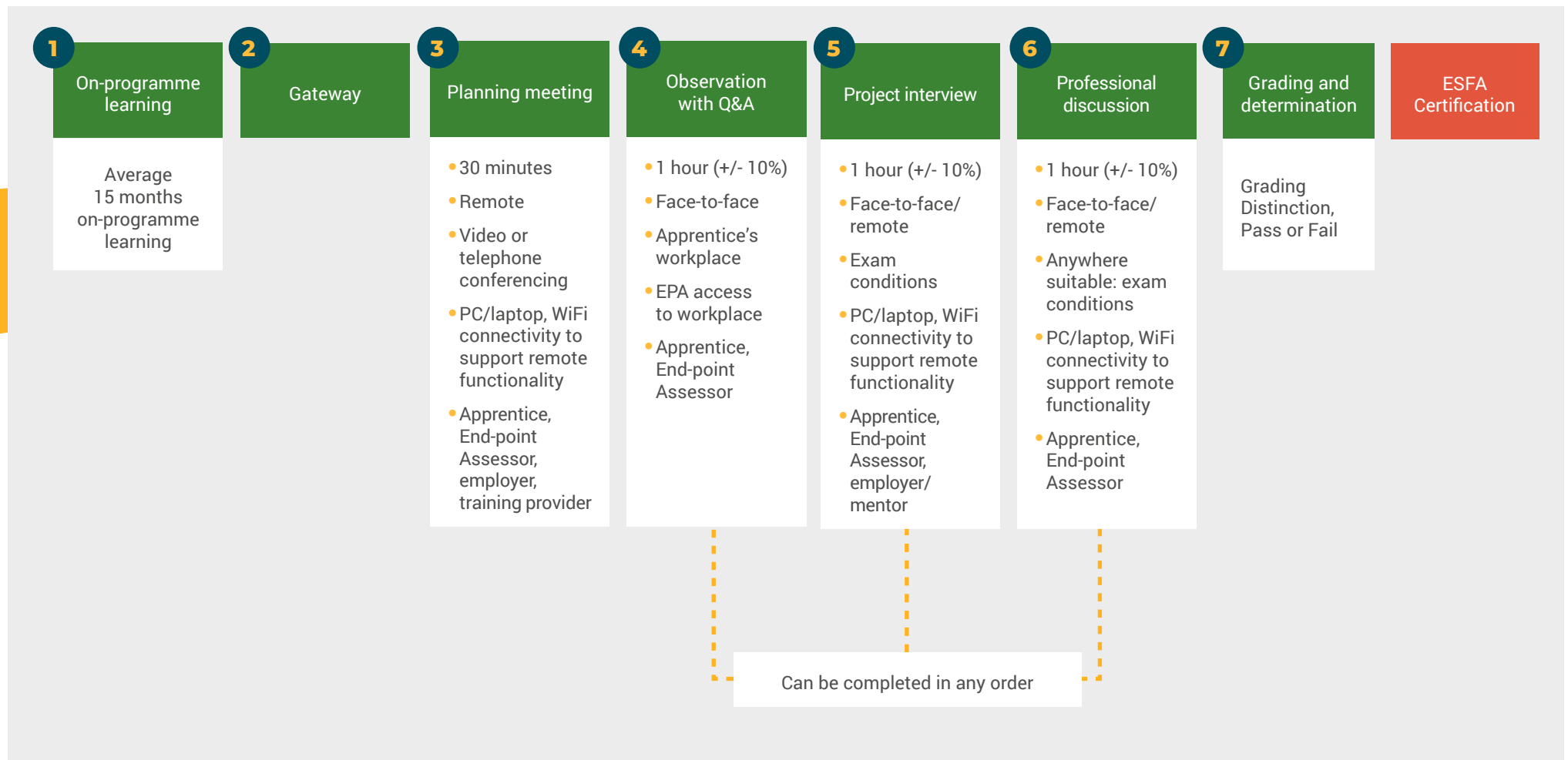
Career Pathways



End-point Assessment (EPA)




End-point Assessment journey





**Thanks for
your time.**

 hello@lifetimetraining.co.uk

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