



## Customer Service & Engagement



# Customer Service & Engagement

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# About This OER Resource

## Open Educational Resources

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This textbook has been adapted and remixed from a variety of sources — faculty from the US and Canada who have led the way in creating the first OER resources on the topic of customer service strategy. The primary source of this adaptation was *Customer Relations for Managers* by Dr. Shawna Coram, a textbook published by Florida State College at Jacksonville, under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License, unless otherwise noted. Dr. Coram's text was adapted from *Customer Centric Strategy* by Kerri Shields, a textbook published by the eCampusOntario (and BCCampus) under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License, unless otherwise noted.

With this version, I have added chapters on Customer Buying Behavior & Journey Mapping, Customer Behavior Styles & Types, and Service Breakdowns & Recovery. These chapters contain adaptations from a variety of sources as well as original content. Soon, I plan to include new chapters on Measuring Customer Satisfaction and Customer Service Technology.

## OER Sources

The following source materials, licensed as CC-BY-NC were adapted, reused, and remixed to create this textbook:

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# Introduction

## Customer Service & Engagement

Customer Service & Engagement explores the critical role of customer interactions in driving organizational success. Whether in the hospitality and tourism industry or business management, superior customer service is essential for building customer loyalty, enhancing reputation, and fostering long-term profitability. This course provides students with the skills and strategies needed to exceed customer expectations and create meaningful, lasting connections with both internal and external customers.

Through the study of communication techniques, customer needs analysis, and service recovery strategies, students will develop the ability to engage customers across various platforms, including face-to-face, telephone, and digital channels. The course emphasizes the importance of active listening, empathy, and adaptability in creating positive customer experiences. Students will also learn to manage challenging situations effectively, transforming potential conflicts into opportunities to strengthen customer relationships.

By the end of the course, students will not only understand the value of exceptional service but also be equipped with practical tools to implement it in real-world settings. These skills will prepare them to thrive in a competitive, customer-driven business environment and contribute to building organizations where service excellence is a core value.



# Chapter 1: Customer Centricity

## *Learning Objectives*

After reading this chapter, you should be able to do the following:

1. Define the term “customer service”.
2. Define the term “customer centricity”.
3. Identify how changes in consumer behavior affect how companies serve customers.

## Customer Service

**Customer service** is the assistance and advice provided by a company to customers throughout the customer journey; before, during, and after the sale. Humans usually provide customer service to other humans, but some service comes from machines, technologies, animals, etc. The service a customer receives becomes part of the experiences they have with the company.

For example, if you purchase a product and need to return it because it is missing a part, you might drive to the store, get the product out of your back seat, put it in a cart, wheel it into the store, visit the return counter, speak with an employee about your return, and so on. You may even phone the store before driving there. In this example, your perception of the company and your experience with the company will be based on many factors:

- Availability of parking
- Availability of carts
- Wait time in the line-up at the return counter
- The manner in which the employee speaks to you at the return counter (courteous, professional)
- The efficiency of the employee implementing the return process (equipment, cash)
- The manner in which the employee speaks to you on the phone (courteous, professional)

Now, imagine that you did phone the store before driving the product back to the store for a return and refund. You explained that there was a missing part to the staff member on the phone. The staff member on the phone at the return counter informed you that many customers have had this same issue and that the manufacturer is able to send you the missing part by express delivery, free of charge. As well, the manufacturer will include a small gift, an accessory item for your product, due to the inconvenience. Will you now decide to keep the product? You may or may not, but



Photo by Kampus Production from Pexels

you will feel that the information the customer service representative shared with you over the phone was valuable and you will appreciate that they did so. This touch-point, over the phone, is an experience that should leave you with a positive view of the manufacturer and the retail store, even though the manufacturer made an error by not including one of the parts in the first place. Would your perception of your experience have been negative if the representative on the phone did not share this information with you, and you found out only after you had driven all the way to the store and stood in the return line for some time? Most likely it would not be as positive as hearing this information before you put in the effort to return the product. That is why it is so important for leaders and managers to build a culture of customer centricity, train employees, build standards and measure performance pertaining to customer service. Companies need to retain customers to stay in business, and you need to help the company retain customers to stay employed.

A final note about the scenario above, the retailer is actually a customer of the manufacturer (product supplier or vendor); therefore, the manufacturer also has the desire to keep the relationship positive with their customer (the retailer). If the manufacturer did not satisfy the retailer's customers by offering a free replacement part with express shipping, the retailer's customers would become angry at the retailer (the place they purchased from). If this situation occurs often, the retailer will most likely search for a different product supplier or at least stop purchasing that product from that specific supplier. So, it is not only important to keep individual customers happy in business-to-consumer sales (B-2-C), but it is also important for businesses to keep their business customers satisfied in business-to-business sales (B-2-B).

In subsequent chapters, you will learn about providing customer service in both a face-to-face retail environment as well as in a contact center environment, and about managing customer service teams and customer service technologies.

Watch the "Poor versus Great Customer Service" YouTube video below for an example of what bad service looks like compared to good service.<sup>1</sup> Closed captioning is available on YouTube.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=29#oembed-1>

## Customer Experience (CX)

**Customer experience** is the result of an interaction between the customer and the company. It is how customers perceive their interactions with the company or brand. A **customer touch-point** is a point in time when the company connects in some form with the customer (e.g., website, phone, email, social media, retail store, returns, service, and products). There are many different customer touch-points, for example, when a customer phones the contact center for support, when a customer first visits the company website to review its products, or when the customer visits the store. The customer will get an impression of the company from each of these interactions. If the store is unclean or the products are difficult to find or the staff are rude this could leave the customer with a negative impression of the company and they might perceive the store in a negative way, thus, having a negative customer experience. The customer's perception IS the customer's experience.



*Photo by Sebastian Coman Photography from Pexels*

Companies work hard to create a positive experience for customers, but things do go wrong at times, and some customers will perceive that the company has not met their expectations in some way, thus, leaving those customers with a negative impression or perception of the company.

Over time, as the customer has more and more experiences with the company, these experiences may shape the customer's perception negatively or positively, and too many negative experiences will most likely cause the customer to discontinue engaging with the company; they will visit a competitor's store instead.

## Explore the Concept – Customer Experience (CX)

Consider the following questions:

1. When shopping or eating at a restaurant, what might occur that would cause you to have a negative customer experience? What might occur that would cause you to have a positive customer experience?
2. What were your expectations when you entered the establishment? Did the company meet your expectations?
3. If you visited this restaurant twice and had positive experiences both times, but then on the third visit you had a negative experience, would you return a fourth time?
4. What would you suggest as three “best practices” for creating a positive customer experience?

There is a popular saying, “a company is only as good as its people”. This statement refers to the need to hire good people, train employees, and create a positive corporate culture. When the employees are happy working for the company they will most likely do their best work to help the company provide positive experiences to customers. Of course, while the interactions your employees have with customers are a large part of the customer experience, other factors are also important.

Customers have certain expectations of service and what they experience with the company, for example, when you shop at a Dollar Store (e.g., Dollarama, Dollar Tree, Dollar Store, Dollar Shop, etc.) you probably expect low prices and do not expect that every product the company sells is of high quality and comes with a warranty. You might expect those things from Apple, BMW, Harley Davidson, or other company that is known for high quality and prestige. From a dollar store, you expect the store to be clean and the products arranged in a manner that makes it easy to find the products you are looking for. You expect prices to be low. You probably expect the staff to be helpful, friendly, and professional. If for example, you walked into the store and the lights were not working, it might upset you, or if it was the middle of winter and the store had no heat, you might not shop very long. If the products were not on the shelves and there were boxes blocking the aisles, you might become annoyed.

What if you had received poor service at the store, the store was a mess, the cash register was not working the day you visited the store, and you could not find the product you wanted in stock? What would you do or say to the staff? What would you think about the store? Would you shop there again? Would you tell your friends about the poor experience you had? Most likely, you would not go back, you would think the store was not professional, you would not shop at that location again, and you would probably tell your friends and family what a bad experience you had there.

Organizations that do not improve their customer experiences through improved customer service, improved customer journeys, and improved customer centricity will not stay in business long in today's global and technological world. Consumers can go online and buy whatever they need and want quickly and easily. Consumers can switch to a competitor, in most cases, with little risk or switching costs. Consumers today are savvy. They research and learn about products they want before they buy and they expect much from the organizations they patronize.

Customer experience (CX) is the new marketing battlefield. More than two-thirds of marketers responsible for CX say their companies compete mostly on the basis of CX, according to the 2017 Gartner Customer Experience in Marketing Survey. And in two years' time, 81% say they expect to be competing mostly or completely on the basis of CX.<sup>2</sup>

## Customer Journey

The **customer journey** is the complete sum of experiences that customers go through when interacting with a company and its brands. It considers the complete path from brand discovery to purchasing and beyond. The focus is not on purchases made, but rather on how the customer feels about the interactions throughout their journey with the company.

In building a customer-centric business, **personas** and **customer journey maps** are important strategic tools that help provide an in-depth understanding of who a company's customers are, what they need, and how they interact with the company across all touchpoints.<sup>3</sup> These tools help to share customer insights across the organization and can be critical for building employee buy-in and helping teams take targeted action to improve customer experience.

**Personas** are fictional customer types created to represent real target customer groups. They are more than generalized customer segments because they have individual names and stories that reflect personal attributes and behavioral characteristics such as customer needs, motivations, and attitudes. For example, a company may target Reza, female, mid-40s, a college professor, a parent of three teenage children, shops online due to time constraints, orders delivery from restaurants a few times per week, enjoys exercise, eats vegan, etc. The company creates these personas to help them better understand all the needs of their target customers, which in turn helps them provide products, services, and processes that will meet or exceed the customers' expectations.

Once a company fully understands the lifestyle and demands, responsibilities, attitudes, and desires of their target customer; they can map the customer journey. Mapping the customer journey will allow the company to identify where they may not be serving the customer to the best of their ability so they can make improvements to the customer experience.

The **customer journey map** is a visual depiction (diagrammed or written) detailing the path the customer takes from the time the customer first discovers the brand, to purchasing, and beyond. The customer journey map examines the full experience of being a customer with the company and examines all touch-points and channels.

## A customer journey example:

Tom is shopping online for a new car (website touch-point). He decides to phone a car dealership to ask about a vehicle he saw online (phone touch-point). Tom is greeted in a friendly manner and has all his questions answered by a salesperson (employee touch-point). Tom makes an appointment and comes to the dealership to test-drive the vehicle he is interested in (location/organization touch-point). The salesperson, Jordon, who Tom spoke with on the phone greets him, answers his questions, demonstrates a friendly and professional manner while dealing with Tom, and sends him out on a test drive (employee and product touch-points). Tom decides to purchase the vehicle and Jordon completes the paperwork, processes the sale and payment, and offers to deliver the vehicle within two days (employee and company policies/practices touch-points).



*Photo by Andrea Piacquadio from Pexels*

Jordon assures Tom that the vehicle comes with warranties, and should Tom change his mind about the purchase, he may return the vehicle within the first 30 days no questions asked (employee, manufacturer, and company policy touch-point). Jordon asks if Tom would like to register for a loyalty program whereby Tom will receive emails on future promotions and receive gifts for referring others (if they purchase a vehicle too). Tom is interested and Jordon gathers Tom's email. Jordan provides Tom with a \$100 gas card as a thank you gift for purchasing the new vehicle (employee and company policies touch-points). Later in the week, Tom tweets a picture of himself standing in front of his new vehicle and he mentions the dealership and the excellent service he received from Jordon. He even recommended the dealership on dealerrater.ca. A few months later, Tom feeling loyal to the dealership, and remembering the loyalty rewards program, refers a friend to Jordon at the dealership.

It is important to create many personas and scenarios because every customer's journey will be slightly different. It is also important for companies to talk to customers (and employees) to learn more about the customer journey and experiences customers have. Creating personas and customer journey maps will help organizations identify poor service issues so they can take action to improve their customers' experiences.

## Customer Centricity

**Customer centricity** is a way of doing business that fosters a positive customer experience before, during, and after the sale in order to drive repeat business, build customer loyalty (which leads to customer referrals), increase business growth, and gain a competitive advantage.

A customer-centric company is more than a company that offers good customer service. Anytime a customer-centric business makes a decision, it deeply considers the effect the outcome will have on its customers. An organization that forgets about customers is destined to fail. They will build the wrong products, invest in the wrong resources, and lose goodwill with customers.<sup>4</sup>

Customer-centric organizations identify their most valuable customers and ensure their satisfaction. These organizations focus on ensuring employees understand how important customers are to the company. Often the organization's mission, vision, and values include a customer-centric focus as more and more companies see a need to build relationships with their customers. Based upon the company's mission, vision, and values the company aligns goals, distributes resources, develops products and services, defines processes, and develops strategies for competitive advantage.

Markets have moved from product centricity to customer centricity. Companies used to focus on design, manufacturing and logistics and in the past when products and services could achieve a clear product/service difference, sustainable and beneficial, a product-centric approach made sense. Today, we have informed consumers, competitive markets, and few tangible product/service benefits—a combination that has resulted in the focus shifting to customers.<sup>5</sup>

Don Peppers has a very good article on LinkedIn explaining why businesses have moved from an era of product centricity into an era of customer centricity. For a good read, visit [Product-centricity and customer-centricity](#) – source Don Peppers – read on LinkedIn

The main reason organizations should follow a customer-centric strategy is that if they do not acquire and retain customers they will not survive. Many company leaders believe their business is customer centric, but employees and customers do not always agree. Why do you think that is?

Why do so many companies struggle to get customer centricity right? The volume, velocity, and variety of customer data that now exists overwhelm many organizations. Some companies do not have the systems and technology to segment and profile customers. Others lack the processes and operational capabilities to target them with personalized communications and experiences.<sup>6</sup>

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**“Someone calling themselves  
a customer says they want  
something called service.”**

*Cartoon by Ted Goff on Bing All Rights Reserved*

Being customer centric is about more than just offering a good product or staffing a contact center. It becomes a cultural way of life for the company and impacts everything from employee engagement to customer experience. Forbes provides a list of 100 customer-centric companies from ten industries including Retail, Finance, Healthcare, B2B, Software, Hospitality, Insurance, Telecom, Manufacturing, and Agriculture.<sup>7</sup> Some of the companies on the list include:

- Trader Joe's excels at quick response times and employees who will do anything to make customers happy.
- Sephora, the beauty brand, uses technology to create a personalized experience with a comprehensive app, virtual try-on of makeup products, and a strong online community for a seamless customer experience.
- Amazon is constantly innovating with new customer solutions, including one-day shipping, easy returns, and creative physical locations that integrate for a truly omnichannel experience.
- Slack helps customers be successful in their own businesses and listens to their feedback to fine-tune their service.
- FedEx, the shipping company, stays on top of new technology to empower its customers and provide quick and reliable deliveries.
- Google's employees understand all of the products and can assist customers wherever needed.
- Apple employees use the Three F's: Feel, Felt, and Found to empathize and help customers get the perfect tech solutions for their lives.
- Hilton empowers its front-line staff with customer feedback and gives them data to provide personalized, proactive service to every guest.
- TELUS customers have a choice of how they get support help, from online tutorials to detailed instructions on any possible issue.
- Verizon combines artificial intelligence (AI) with human employees to create a powerful experience that is personal for customers and available through multiple channels.
- Netflix knows its customers inside and out and leverages data to recommend shows they actually want to watch.
- LG, the appliance manufacturer, often receives recognition for its innovation and ability to add customer-friendly features.
- 3M employees feel trusted and part of a community, which leads to fulfilling customer needs and creating innovative products to solve future problems.
- Indigo combines agriculture with technology by using data analytics regarding sustainably growing common crops like cotton and rice.

If a company is committed to making customer-centricity a corporate priority for the organization, the absolute first step is to fully understand the customer's needs and expectations. While much of this happens through the customer-facing employees, they will require the support of the rest of the organization to succeed. As such, everyone, regardless of department or role, should actively contribute information, background, tools, resources, and training to achieve a unified understanding of the customer. Once this happens, the organization will be well on its way to becoming customer-centric.<sup>8</sup>

## Factors Impacting the Service Sector

Services play a key role in economies around the world and the US is no exception. The economy is divided into three sectors; the primary sector of an economy is the sector in which companies make direct use of natural resources, the secondary sector produces finished goods, while the tertiary sector, also known as the service sector, makes use of people's knowledge and time to improve productivity, performance, and potential. This sector includes businesses that offer services in the following areas: transportation, government, health care, construction, banking and finance, communication, retail, tourism, education, utilities, recreation, social work, real estate, etc.

Many factors have caused an economic shift from manufacturing to service, some of which include globalization of the economy, government deregulation, government programs, customers expecting personalized experiences, and increased use of technology both by customers and businesses.

## Customers Want Personalized Experiences

Consumers need products and services to function the way they need them to in order to solve their problems or desires, but companies can no longer rely on their products and services as their primary competitive differentiator; today, they can only compete based on delivering an outstanding experience. Customers want personalized experiences, they want companies to know their name and understand their needs and wants. Companies that offer these experiences are able to differentiate their brands and create a competitive advantage.

"According to Janrain 48% of consumers spend more when their experience is personalized while 74% of people hate being shown irrelevant content. So what does this say about personalization? In customer experience, personalization is a winning strategy that can help companies advance their relationship with customers. 88% of marketers claim that they've seen a measurable improvement in their businesses after implementing customer experience personalization tactics."<sup>9</sup>

Millennials are prioritizing their cars and homes less and less, and assigning greater importance to personal experiences—and showing off pictures of them. This trend is ultimately helping fuel the growth of billion-dollar-plus start-ups like Uber, WeWork, and Airbnb.<sup>10</sup>

**Personalization** has become integral to the customer journey and is now a key driver of brand loyalty across all channels. Consumers are much more likely to buy from brands, both in-store and online when offers are personalized. Consumers are also interested in purchasing more personalized products and services and are willing to wait longer to get them.<sup>11</sup>

Canada Goose is getting personal with its customers, offering an immersive experience; it has a Cold Room that blends both entertainment and functionality, making it a good example of experiential retail that actually serves a purpose. It has a faux-rock crevasse, a room that snows, and a floor that cracks like ice, but it does not have any products the customers can take home. Customers can only order products for delivery later, with limited sizes and models to try on. In fact, the luxury coat retailer is not calling the store, a store, it is calling it “The Journey: A Canada Goose Experience.”



*Photo by Andrea Piacquadio from Pexels*

Staff will guide customers through a series of themed rooms, before ending in an area where customers can browse a digital catalogue, talk to sales staff about fit and place an order. A certain proportion of people visiting the store do not intend to buy a jacket, but are just curious about the Cold Room experience. This gives the brand an opportunity to make a good impression on people who are not yet Canada Goose customers, but might be in the future. The Cold Room is a fun, unusual experience that helps customers make more informed shopping decisions.<sup>12</sup>



*Photo by RUN 4 FFWPU from Pexels*

The Running Room, which is a store for people who like to run, provides personalized customer experiences through training programs that meet the needs of a wide variety of customers, ranging from those who are just getting into a fitness routine to those contemplating a marathon. The store sells a selection of top brand-name running shoes and apparel and offers training programs such as Walking, Learn to Run, 5K Training, Marathon and Half Marathon training, 10K Training,

and For Women Only Running. The Running Room training programs are committed to educating customers on a lifestyle of fitness. Running Room’s free Run Club meets twice weekly, where runners of all levels run in a social, supportive group. This social component brought to running by the Running Room builds a true sense of community in each location. Communicating with its customers via its in-store team, its website, Running Room Magazine, forums, Twitter, and Facebook keeps the company agile and innovative. “We believe that the Running Room philosophy and our in-store environment are unlike any other retail business in North America. While we offer clothing, shoes, products, and accessories for walkers and runners, we also help people to change their lives through fitness activities,” says the Stanton family.<sup>13</sup>

## Explore the Concept – Customers Want Personalized Experiences

Conduct an Internet search for companies that are innovating with personalized customer experiences. Consider the following questions:

- Why do you think consumers are seeking these types of experiences? What are customers saying about these experiences?
- What types of companies are developing these innovations? Have the companies' revenue or market share increased since investing in these added-value strategies?

## Increased Use of Technology

**Digital transformation** is the integration of digital technology into all areas of a business, resulting in fundamental changes in the way a business operates and the value it delivers to its customers. Digital transformation is forcing companies to change their business models and adapt to the new market reality. Today, customers expect relevant content in relation to what they are doing anytime, anywhere, and in the format, and on the device of their choosing. It is the customer's journey that dictates the company's strategy.<sup>14</sup>

Customers have always wanted efficient, friendly, and reliable service, but with the development of new technology, their expectations have increased. Customers no longer tolerate poor service because there are just too many businesses out there that will meet or exceed customer expectations.

With online shopping and mobile apps, consumers have virtually every product they can think of available at their fingertips. The growth of online shopping has skyrocketed. In 2018, an estimated 1.8 billion people worldwide purchased goods online, and the global online sales amounted to \$2.8 trillion; and, is estimated to grow to \$4.8 trillion by 2021.<sup>15</sup> An online store and social media presence are essential for companies selling in this global and digital business world. Customers want simple, direct, and easy transactions; technology has taught them to expect it.

Customers today are more informed than ever before. They use technology to shop online, conduct research, and compare prices, products, and services among competing companies. According to Outerboxdesign.com, 80% of shoppers use mobile phones in-store to check product reviews, compare prices or find other store locations.<sup>16</sup> With so many individuals owning cell phones today, social media is a great way to connect with customers.

In order to keep up with this new kind of “always-connected” customer, businesses must embrace technology to deliver unmatched customer experiences. Fortunately, putting the customer first is already at the center of many organizations’ strategies. Two-thirds of the CEO’s of Global 2,000 companies will shift their focus from traditional, offline strategies to more modern digital strategies to improve the customer experience before the end of 2019 – with 34% of companies believing they will fully adopt digital transformation within 12 months or less.<sup>17</sup>

**Business intelligence (BI)** leverages software and services to transform data into actionable insights that inform an organization’s strategic decisions. Business intelligence and performance analytics leverage software to transform data into crucial insights that inform company decisions, thereby empowering employees to make better business decisions.

**Machine learning** is a data analysis technique that automates analytical model building. Some advantages of machine learning include intelligent customer service chatbots, improved product search, and fraud detection and prevention.<sup>18</sup>

**Telecommuting** is also referred to as telework, mobile work, flexible workplace, flex-hours, e-commuting, or remote work and is a work arrangement in which employees do not commute to a central location instead they work outside the office location from various locations. Many workers can work from home (WFH) when they have access to the technologies they need to do their jobs. Telecommuting has become a popular choice and employee incentive in some cases for those who wish to work from home. Customer service and sales representatives need to learn how to use customer relationship building (CRM) software in order to meet customer expectations, whether working from home, at the office, or on the road. With access to technology, employees can be located in the same city as the company they work for, or located anywhere in the world.

Customer-centric virtual and **augmented reality (AR)** retail applications today focus on helping consumers experience brands and products without having to go into stores. Beauty brand Cover Girl, for example, opened an AR makeup station in its flagship store in New York where shoppers can virtually try on a range of cosmetics and then share their makeovers on social media with friends. Pottery Barn offers an AR app for its Pottery Barn and PBteen brands that lets users drag and drop items in a room to see how they work with existing furniture and decor. They also can completely empty a room to start the design process from scratch, and shoppers can purchase the items they like right from the app. Swedish retail IKEA has a similar offering with its “Place” app, helping users to visualize how an item will look in their homes before they purchase it.

The **Internet of Things (IoT)** is made up of billions of smart, connected devices, and gives any “thing” a voice through the data it gathers, produces, and distributes. With around 26 “smart objects” for every human being on Earth predicted by 2020, the ability for companies to leverage connected products and other sensor-generated data to enhance the customer experience is unprecedented.<sup>19</sup> IoT devices will change eCommerce by turning everyday objects into potential sales channels for retailers. IoT products and devices include smart and digitized vehicles, laptops, smartphones, smart gadgets, and smartwatches. You may already own some of these devices. Have you heard of the Amazon Dash Button? A device that connects over Wi-Fi to ensure that you do not run out of household items such as milk, bread, medicine, soap, or dog food, ever again. Maybe, you have a Google Home Voice Controller. It allows you to enjoy features like media, alarms, lights, thermostats, control the volume, and many more functions just using your voice.



*Photo by John Tekeridis from Pexels*

## Explore the Concept – Increased Use of Technology

consider the following questions:

- Do you own an IoT device?
- What forms of digital or technology-driven customer service have you experienced? For example, does your library have a live chat with a librarian available from the library’s website?
- Have you experienced speaking with a chatbot or an automated attendant on the phone?
- Have you watched live video streaming from a company?
- Have you experienced personalization on the websites or social media you frequent?
- How does technology impact the way you shop and the way companies interact with you?

## Key Takeaways

1. **Customer experience** is the result of an interaction between the customer and the company. It is how customers perceive their interactions with the company or brand.
2. A **customer touch-point** is a point in time when the company connects in some form with the customer (e.g., website, phone, email, social media, retail store, returns, service, and products).
3. **Customer service** is the assistance and advice provided by a company to customers throughout the customer journey; before, during, and after the sale.
4. In building a customer-centric business, **personas** and **customer journey maps** are important strategic tools that help provide an in-depth understanding of who a company's customers are, what they need, and how they interact with the company across all touchpoints.
5. **Personas** are fictional customer types created to represent real target customer groups.
6. The **customer journey map** is a visual depiction (diagrammed or written) detailing the path the customer takes from the time the customer first discovers the brand, to purchasing, and beyond. The customer journey map examines the full experience of being a customer with the company and examines all touch-points and channels.
7. **Customer centricity** is a way of doing business that fosters a positive customer experience before, during, and after the sale in order to drive repeat business, build customer loyalty (which leads to customer referrals), and increase business growth.
8. Many **factors** have caused an economic shift from manufacturing to service, some of which include globalization of the economy, government deregulation, government programs, customers expecting personalized experiences, and increased use of technology both by customers and businesses.
9. **Personalization** has become integral to the customer journey and is now a key driver of brand loyalty across all channels. Consumers are much more likely to buy from brands, whether in-store or online when offers are personalized. Consumers are also interested in purchasing more personalized products and services and are willing to wait longer to get them.
10. **Digital Transformation** is forcing companies to change their business models and adapt to the new market reality. Today, customers expect relevant content in relation to what they're doing anytime, anywhere, and in the format, and on the device of their choosing. It is their journey that dictates the company's strategy.
11. **Business intelligence** (BI) leverages software and services to transform data into actionable insights that inform an organization's strategic decisions. Business intelligence and performance analytics leverage software to transform data into crucial insights that inform company decisions, thereby empowering employees to make better business decisions.
12. **Machine learning** is a data analysis technique that automates analytical model building. Some advantages of machine learning include intelligent customer service chatbots, improved product search, and fraud detection and prevention.
13. **Telecommuting**, also referred to as telework, mobile work, flexible workplace, flex-hours, e-commuting or remote work is a work arrangement in which employees do not commute to a central location instead they work outside the office location from various locations.

14. Customer-centric virtual and **augmented reality (AR)** retail applications today focus on helping consumers experience brands and products without having to go into stores.
15. The **Internet of Things (IoT)** is made up of billions of smart, connected devices, and gives any “thing” a voice through the data it gathers, produces, and distributes.

## End-of-Chapter Exercises

1. **Service Sector.** Research one of these companies and explain how this company is addressing the changes impacting the service sector: Bank of Nova Scotia, Canadian Tire, PepsiCo, McDonald’s, IKEA.
2. **Customer Journey.** Map your customer journey for any purchase you recently made. Identify the company touch-points, your experience at each touch-point, and the perception you were left with after the purchase.
3. **Annual Report.** Locate an annual report for the GAP Inc. (or some other company) and review it. What does it say about brands, customer service, multiple service channels, and technology? Does the report mention specific details that relate to this chapter’s content? If so, what does it say?

## Self-Check Exercise – Customer Centricity Quiz



*An interactive H5P element has been excluded from this version of the text. You can view it online here:*

<https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=29#h5p-1>

## Additional Resources

1. LinkedIn Learning Customer Service Training
2. 8 Tips for Becoming a Customer-centric Organization
3. How to Create a Customer-centric Strategy for Your Business
4. Customer Experience (CX) versus Customer Service: What They Are and Why They Matter

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(Note: This reference list was produced using the auto-footnote and media citation features of Pressbooks; therefore, the in-text citations are not displayed in APA style).

## Notes

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# Chapter 2: Customer Service Profession

## *Learning Objectives*

After reading this chapter, you should be able to do the following:

1. Identify skills required by customer service representatives.
2. List the benefits of providing excellent customer service.
3. Discuss tactics for dealing with angry, upset, or difficult customers

## Working in Customer-Facing Environments

“Customer service is both a type of job and a set of job skills. As a job, customer service professionals are responsible for addressing customer needs and ensuring they have a good experience. As a skill set, customer service entails several qualities like active listening, empathy, problem-solving, and communication. Customer service is used in many jobs at every level. While traditionally you might think of customer care as a service from a business to a consumer (B-2-C), it is also applicable from one business to another business (B-2-B) and from one business to another department within the same business. For example, you may be in a role that provides services to other, internal teams. In this case, you would want to ensure that you understood and were able to meet their needs.”<sup>1</sup>

When you think of the people that work in a customer service role, who do you think of? Do you think of the person that greets you at the restaurant, the person who answers the phone when you call your phone service provider for support or the person who delivers the products you ordered online to your home? Each of these people is certainly working in a customer service role. What you might be surprised to know is that every job position has some degree of customer service embedded in the role. People who work in the information technology, human resources, or finance departments do not usually interface with external customers on a day-to-day basis, but they do interact with their colleagues regularly. **Internal customers** are the company employees who need support, information, or action from other employees. These internal customers may work just down the hall, in another building, or in another country, but they are still part of the company and are working to help satisfy external customers. **External customers** are the customers who purchase products or services from the company. Employees who work in job positions that require them to interface with external customers directly might be referred to as

front-line, front-facing, front-end, or customer-facing employees. Those that work to serve internal customers are working in back-end/back-office/behind-the-scene job positions.

An example of an employee working to serve an external customer may be a situation where a customer phones the store's service desk and the employee who answers the phone listens attentively to the customer's story, then places the customer on a brief hold while they check with the manager or another employee about the customer's concern or query. The employee who is asking for help has become an internal customer at that moment in time, as they are receiving support from their manager or co-worker. After they receive support, they then return to the phone to follow up with the external customer and finish the call. It takes a team working together to provide excellent customer service. Those external customers who purchase the products and services the company provides are the ones keeping the company alive, and ensuring employees have jobs. If there were no customers there would be no need for employees!

As a service professional, you are the "face" of your organization in customer interactions. Your primary function is to listen actively and gather the information needed in order to make a decision on what course of action is needed to best serve the customer in any given situation. This typically requires a polite, professional demeanor and effective and efficient answers to questions or resolutions to problems.<sup>2</sup>

## Capabilities Customer Service Professionals Require

How can employers ensure they are hiring the right people to represent their brand or uphold their company image? What skills can customer service professionals develop to become more proficient at their jobs? There are many skills customer service professionals need to be excellent in their jobs, these include the ability to communicate clearly, use positive language, use positive body language, serve diverse customers, be persuasive, use active listening, interact positively in a team, learn continuously, manage time, and manage stress. They also need to be able to show empathy and think critically to solve problems creatively. These skills and more are critical to creating outstanding customer experiences, and most require a lot of time and practice to truly master.

Some of the capabilities customer service professionals must have, include the following:

- Service Orientation
- Interpersonal communication
- Positive, customer-focused, "can-do" attitude
- Problem-solving, creativity, conflict resolution
- Manage information
- Responsible and professional behavior
- Learn continuously (have a broad knowledge of company products and services)
- Time management
- Stress management
- Team spirit and participation

Each of the customer service skills that are necessary for success in this key role is detailed below.

## Ability to Demonstrate a Customer Service Orientation

You might notice in some job advertisements the phrase, “must have a Customer Service Orientation”. **Customer Service Orientation** means that as an employee, you are able to display positive attitudes and behaviors and demonstrate an awareness of the importance of meeting or exceeding customer needs and expectations. Many businesses today think more about attracting new leads, maximizing sales, upselling, expanding market share, and obtaining a bigger “share of wallet”, than they do about meeting and exceeding customer needs. While increasing profit is important, a company with a genuine customer-first approach will care about customers and their needs because they understand that this is how they can grow profit.

In practice, it might mean that the company trains its service representatives not to upsell products or services to customers that do not need them or want them. It may mean that service representatives do not encourage customers to upgrade a subscription if the customer will not benefit from upgrading. Sometimes, it even means letting a customer go or referring them to a competitor if the solutions your company offers are not best suited for the customer. Have you ever shopped at a company and discovered they did not sell what you needed or wanted? Did a service representative suggest you visit a competing company for that particular product or service? Why do you think they referred you to a competitor rather than trying to sell you something else, or just saying, “We don’t carry that item”? There may be some good reasons for referring customers to competitors, such as creating a positive company image, spreading positive word-of-mouth, connecting with other businesses in a joint effort that will benefit both companies, supporting the values the company has around true customer centricity, building trust and loyalty with customers, and highlighting your company’s confidence in the products and services you do sell. A great example of this comes from Zappos, “Zappos ‘refer to competitor’ tactic (when they don’t have an item in stock)–reflects an incredibly strong customer-centric DNA. The primary focus is not only to maximize revenues but to get the customer exactly what they’re looking for.”<sup>3</sup> It’s also ‘un-corporation like’ to center on the customer to such a degree that you try to sell them something similar that is in stock that they don’t really want, instead of referring them to a competitor to get the exact product they want.

**Service culture** in an organization means putting customers at the center of the business model, developing policies, procedures, values, norms, and beliefs that are centered around focusing on customer satisfaction and understanding their needs and wants.

Company policies, procedures, and employees’ actions contribute to the organization’s service culture. Employees communicate the company culture through their appearance, interactions with customers, product knowledge, skills, and attitude. Maintaining a friendly, positive, and professional attitude in the workplace will take you far. Here are a few of the benefits of providing excellent customer service, for the employee, the company, and the customer.

## ***Employee Benefits from Providing Excellent Customer Service***

- Receive promotions, bonuses, recognition
- Receive project opportunities, growth opportunities
- Retain employment
- Intrinsic rewards from knowing you did the best job you could
- Better relationships with customers
- Better relationships with colleagues
- Better relationships with management
- Happier life

## ***Company Benefits from Providing Excellent Customer Service***

- Positive reviews from customers
- Increased revenues, customers spend more, give referrals
- Positive word-of-mouth, positive company image
- Retain employees longer
- Company growth
- Customers involved in company projects
- Increased customer lifetime value (CLV)
- Retaining customers longer thereby reducing costs in recruiting new customers

## ***Customer Benefits from Receiving Excellent Customer Service***

- Obtain objectives and have issues resolved
- Get involved in company projects
- Rewards for continued loyalty
- Build relationships with employees
- Take advantage of company opportunities
- Happier life

# Ability to Apply Fundamental Work Skills

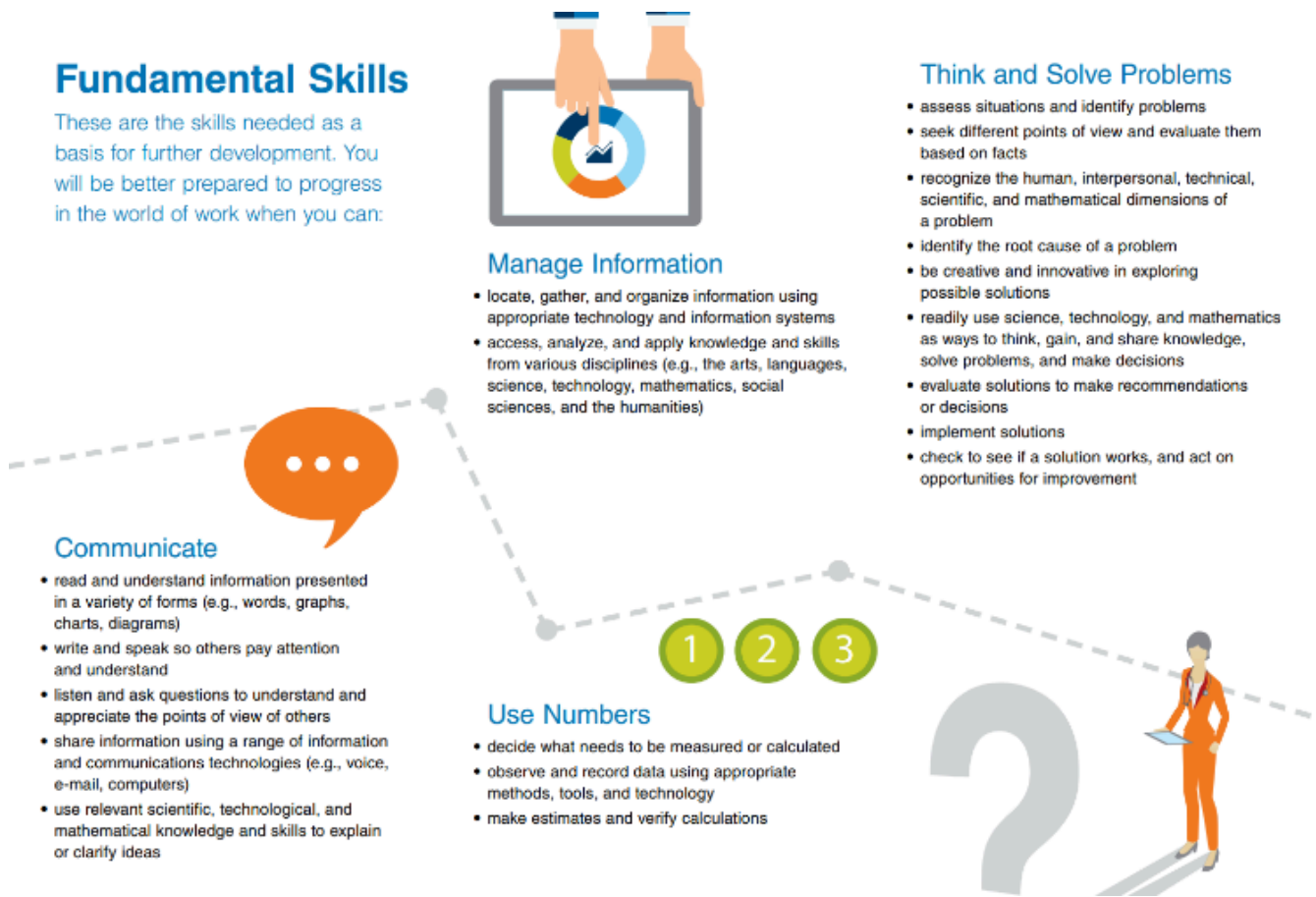


Figure 1. Fundamental Skills. Adapted from *Employability Skills* by Conference Board of Canada, 2022, December 6, Future Skills Centre. Copyright 2018 by Conference Board of Canada.

## Ability to Communicate Verbally and Non-Verbally

It is important that a service professional fully understands the customer's needs and is careful to clearly provide answers, directions, facts, or any other information required to make the sale or serve the customer and build a positive customer relationship. When communication is unclear, customers may misunderstand or misinterpret the message and this could lead to lost business. For example, a customer may ask, "Are there any fries?" when they really mean, "Are fries included with the meal at no extra charge." The service provider may answer, "Yes" only to discover that the customer is upset when the bill arrives to see that they were charged extra for the fries they thought were included in the price. A service provider may need to ask a customer some questions to clarify the customer's expectations and needs before the food order is placed to ensure nothing is left to doubt.

In its *Employability Skills 2000+*, the Conference Board of Canada lists "the skills you need to enter,

stay in, and progress” in the 21st-century workplace. The ability to apply fundamental work skills is one of the skills listed.<sup>4</sup>

Specifically, communication skills:

- read and understand information presented in a variety of forms (e.g., words, graphs, charts, diagrams)
- write and speak so others pay attention and understand
- listen and ask questions to understand and appreciate the points of view of others
- share information using a range of information and communications technologies (e.g., voice, e-mail, computers)
- use relevant scientific, technological, and mathematical knowledge and skills to explain or clarify ideas

Face-to-face communication is the richest form of communication because it allows for the simultaneous interpersonal exchange of cues from linguistic content, tone of voice, facial expressions, direction of gaze, gestures, and postures.<sup>5</sup> Verbal communication coexists alongside non-verbal communication, which can affect people’s perceptions and exchanges in subtle but significant ways.

**Verbal communication** refers to the ability of a customer service representative to think of the right words in order to appease a customer and provide a solution. It does not necessarily mean that a service representative should sound too formal and robotic while communicating with customers. Though being too informal is not good either as it could leave the customer with a negative impression. Keeping a balance is what a customer representative should strive for.

### 10 Tips for Effective Communication with Customers<sup>6</sup>

- Patience is a must
- Accuracy of information is key
- Proactive approach always delights customers
- Attentiveness helps
- Avoid interrupting
- Know your product/service offered inside out
- Honesty works every time
- Active Listening and acknowledgments do wonders
- Analogies help in getting your message across
- Don’t take shortcuts



*Communication Richness: most effective (face-to-face) to least effective (bulk mail not personalized) communication*

**Non-verbal communication** refers to gestures, facial expressions, eye contact, body language, posture, and other ways people can communicate without using language. Your nonverbal communication skills can create a positive (or a negative) impression. Crossed arms can seem defensive. Poor posture may appear unprofessional. A downward gaze or avoiding eye contact can detract from your being seen as confident.

During cross-cultural communication, one should follow one general suggestion: write or speak simply and clearly. Avoid slang, vague words, or colloquialisms. Listen carefully with a positive approach. Speak slowly and be specific. The more you learn about various cultures the better communicator you will become. It is suggested to avoid non-verbal hints because they have different meanings in different cultures; for example, some hand gestures have different meanings among different cultures, so be cautious when using them.

Watch the “Positive Body Language” YouTube video below for tips on positive body language as it pertains to American culture.<sup>7</sup> Closed captioning is available on YouTube.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=50#oembed-1>

## ***Ability to Use Positive Language***

**Positive language** is the art of using words and phrases to communicate a positive, supportive tone to your customers (or anyone else for that matter). Using positive language is important for building rapport with others. Sharing bad news with customers is a part of being a customer service professional. Customer service professionals must learn how to share negative information without being negative. When sharing negative information that may make a customer upset, sad, or angry it is always best to speak face-to-face, but that may not always be possible, and sometimes negative messages must be sent through email or postal mail.

Watch the “Service Recovery – Do Say / Don’t Say” YouTube video below to learn key words and phrases to de-escalate tense situations.<sup>8</sup> Closed captioning is available on YouTube.



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Language is a crucial part of how we interact with others and the perceptions they form of us. For example, a customer may contact the company seeking a specific product, but the product happens to be on back-order until next month. The way the customer service professional uses words to convey that the product is on back-order will help to make or break the sale. Without

using positive language, the sales might say, “Sorry, the product is on back-order and won’t be available until next month.” With positive language, the sales representative might say, “The product will be available next month, and I’m happy to place the order now for you and have it shipped directly to you as soon as it arrives.” Do you see the difference using positive language makes? The first example seems abrupt and impersonal and may upset customers, while the second example is saying the same thing but it focuses on when and how the issue will be resolved rather than focusing on the negative.

Watch the “Sharing Negative Information without Being Negative” YouTube video below to learn how to share negative information with others.<sup>9</sup> Closed captioning is available on YouTube.



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## ***Ability to Listen Actively***

**Active listening** means that you focus on what your customer is saying. You try not to let your mind wander while your customer is speaking. You paraphrase what the customer has said and ask the customer if your understanding of what they have told you is correct. You may ask customers questions to obtain more details of what the issue is. You may have to calm an upset customer. Certainly, the customer is there to gather answers and see results so put yourself in the customer’s shoes, and really listen to their story so you can provide the best customer service you can.

Watch the “Customer Service Fundamentals – Actively listening to Customers” YouTube video below to learn about active listening.<sup>10</sup> Closed captioning is available on YouTube.



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## ***Ability to Think and Solve Problems***

**Service breakdowns** occur daily in all types of organizations. They happen whenever the product or service delivered fails to meet customer needs, wants, and expectations. When the customer purchases a product or service that fails to meet the advertised promises or standards, dissatisfaction and frustration can result which may lead to confrontation and/or loss of business.

“Customer expectations can affect how service is delivered and perceived. Today’s customers are more discerning and better educated, have access to more up-to-date and accurate information.

They also have many more options offered by your competitors. They are often more demanding than in the past. Their expectations about your products and services and the way that you will provide them may create a situation where little you do or say can meet their perceptions. In such cases, remain professional, positive and offer alternatives or concessions, if appropriate, in order to maintain the relationship and provide what the customer needs or wants.”<sup>11</sup>

The training video below was posted on YouTube by Kantola Training Solutions and includes valuable tactics for dealing with angry, upset, difficult, or irate customers, and includes the following topics:

- Connect with the angry customer.
- Show empathy or apologize if appropriate.
- Guide the customer’s attention toward solving the problem.
- Use positive language.
- Have the customer make small decisions.
- Take a timeout or draw the line.
- Know what you can offer.

Watch the “Dealing with an Angry Customer Training” YouTube video below to learn more about dealing with angry customers.<sup>12</sup> Closed captioning is available on YouTube.



*One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=50#oembed-6>*

When dealing with angry customers it is important to use positive language, for example, let them know what you can do for them rather than what you cannot do for them to resolve their issue. Avoid saying, “We don’t.” If you are unable to offer something or provide a service the customer wants, then you might say, “What I can do for you is offer you is...” or “I’m sorry, we don’t actually sell that product, although we do sell something similar if you are interested,” or “I’m sorry, we do not sell that product, but you might try Best Buy,” or “I’m sorry, we do not have that item in stock, would you like me to check our other store locations for you,” instead of saying, “We don’t have that,” or “We don’t do that.” Avoid saying, “I cannot,” “Our policy does not allow for that,” or “No.” Instead try saying, “I understand why you may be upset. I might be upset too in this situation. You have had the cell phone longer than the 30-day exchange window, so what I can do for you in this situation is...” or “I understand what you are asking for, and my manager will need to consider this request. Would you mind waiting a minute while I get my manager?”

**Service recovery** is a company’s resolution of a problem from a dissatisfied customer, converting them into a loyal customer. It is the action a service provider takes in response to service failure. It entails the organization taking actions in response to a service failure. The service failure may have occurred for all sorts of reasons—the service may be unavailable when promised, it may be delivered too late or too slowly, the outcome may be incorrect or poorly executed, or employees may be rude

or uncaring. If you are the customer service representative serving a customer experiencing a service failure, you represent the company, therefore you need to apologize, solve the problem, compensate the customer with something of value. Managers need to create a service recovery process and train employees on the process. Starbucks and other fast-pasted businesses make a point of training via acronyms and other mnemonics because these can help employees mentally walk through the steps at times when they may be flustered and struggling with a situation. Starbucks uses the acronym LATTE for the customer service recovery sequence where L=Listen to the customer, A=Acknowledge the problem/situation by verbally explaining it, T=Take action and solve the problem (this is an opportunity to turn a bad experience into a good one), T=Thank the customer for bringing this to your attention, E=Explain what you did and encourage the customer to return another time. The service recovery sequence at Marriott Hotels spells LEARN where L=Listen, E=Empathize, A=Apologize, R=Respond, and N=Notify.<sup>13</sup>

## ***Ability to Manage Information***

### Email

Email is a business tool used around the world in millions of businesses. It is fast, inexpensive and can send a message to almost any place in the world. As a customer service representative, you will use email to correspond with managers, colleagues, customers, and partners. It is important to follow company guidelines when sending any correspondence. Often companies have guidelines for font size, type, letterhead, signature blocks, etc. It is equally important to use professional language, steer clear of text chat short-cuts you may use with your friends, and ensure a polite and caring tone; after all, you are representing the company.

The Indeed Career Guide offers *20 Best Practices for Email Etiquette in the Workplace*<sup>14</sup> and includes these tips:

1. Use standard fonts and formatting
2. Include a clear subject line
3. Email from a professional email address
4. Use professional greetings
5. Use an introduction
6. Know the culture
7. Be cautious with "Reply All"
8. Use sentence case
9. Double-check attachments
10. Proofread
11. Don't use emojis
12. Be positive
13. Reply within 24 hours
14. Keep your tone professional
15. Check the recipient's name

16. Shorten URLs
17. Perfect your email signature
18. Use BCC appropriately
19. Think before forwarding
20. Set informative out-of-office replies

## Phone

Often you will be responsible for answering incoming phone calls or placing outgoing calls to customers. Starting each call with a greeting, then stating your purpose, and asking the right questions or providing insightful answers will be very important. Ending the call on a positive note is also important to maintain customer goodwill and keep the company image positive. Some companies, especially call centers, provide employees with scripts to guide their conversations with customers. Learning how to use the script without sounding robotic is a skill you will develop over time.

Watch the “Proper Telephone Etiquette” YouTube video below to learn about proper telephone etiquette.<sup>15</sup> Closed captioning is available on YouTube.



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## Texting

For many years now texting has been viewed as a personal communication method and was not used in business often. Today, however, texting is used to enhance communication between businesses and their customers, employees, and partners. Have you noticed that many service providers, such as dental offices, are using texting as a way to remind customers/patients of their appointments? Texting is not only being used to remind customers of appointments but also to confirm appointments or change appointments. Companies often have guidelines for when texting should be used and how it should be used.

## Social Media

Customer service takes place through many media and social media is one realm. Companies often have Facebook, Twitter, YouTube, and Web Chat platforms through which they communicate with customers. This may be one aspect of your job especially when working in a customer contact center. Many organizations offer customized training for employees to learn how to manage these technology tools in offering excellent customer service experiences.

## Virtual Meetings and Videoconferencing

Online meetings are often used to conduct business meetings when the participants are not physically in the same location. It is a good idea to practice with these tools before holding a meeting to ensure you can manage the settings for participants, audio, camera, etc. It is also a good idea to review best practices for holding an online meeting.

## Ability to Apply Personal Management Skills

In its Employability Skills 2000+, the Conference Board of Canada lists “the skills you need to enter, stay in, and progress” in the 21st century workplace. The ability to apply personal management skills is one of the skills listed.<sup>16</sup>

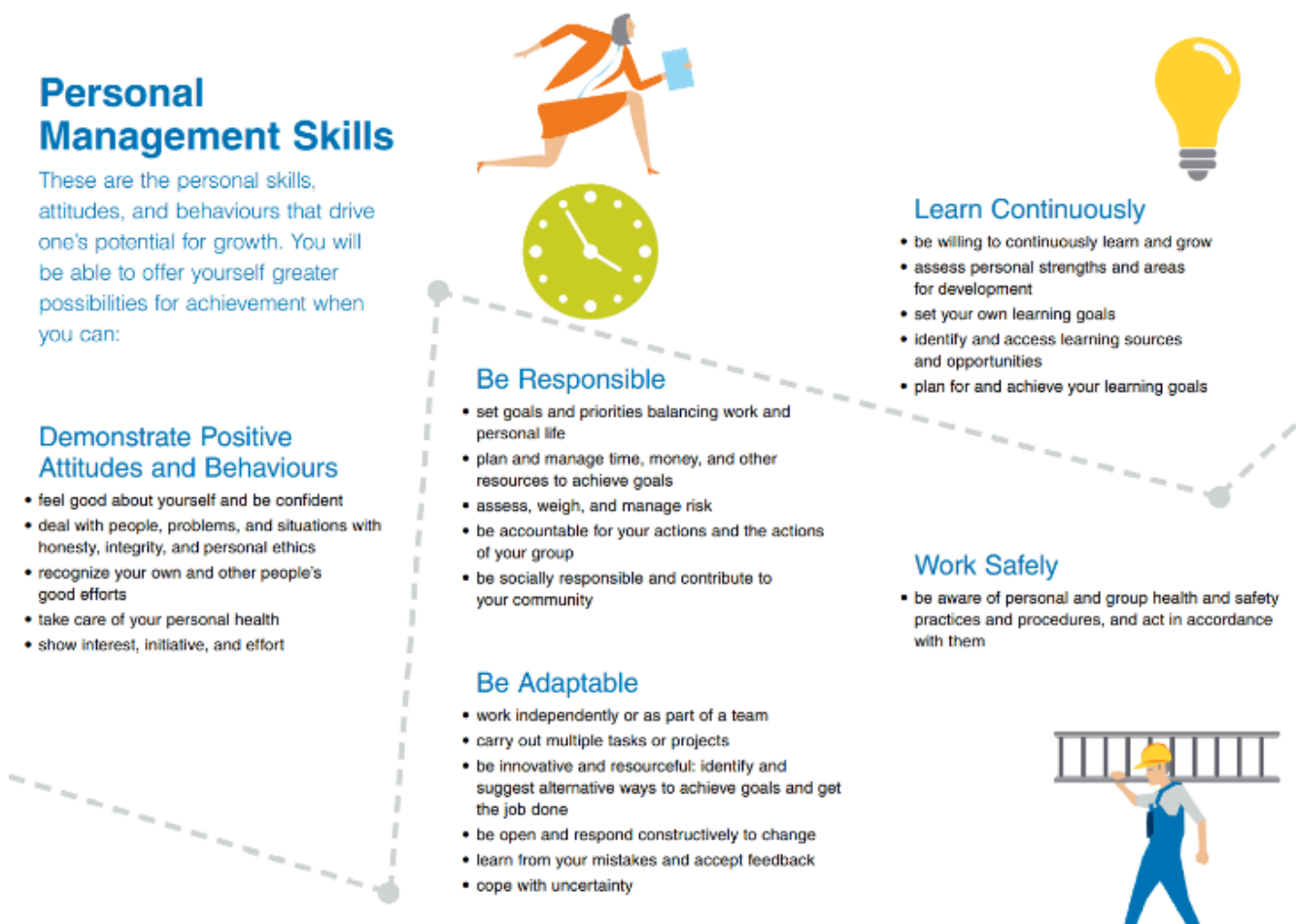


Figure 2. Personal Management Skills. Adapted from *Employability Skills* by Conference Board of Canada, 2022, December 6, Future Skills Centre. Copyright 2018 by Conference Board of Canada.

## ***Ability to Be Responsible and Professional***

“Develop self-awareness. Learn to manage your emotions and gain awareness of your emotional triggers so you can manage your reactions positively and productively. Accept and reflect on feedback to assist as you learn and grow.”<sup>17</sup> Professionalism leads to workplace success, a strong professional reputation, and a high level of work ethic and excellence. When you demonstrate positive attitudes and behaviors, are reliable and adaptable, work safely, and follow company policies and procedures you are working in a professional manner. Professionalism may include expert knowledge and skills in a specific area or subject. It may include your ability to consider customer needs and wants in conjunction with company goals and provide exceptional options to customers. Finally, professionalism may include your ability to work as part of a team and place team goals over personal preferences.

Mindtools describes professionalism as:<sup>18</sup>

- Professionalism involves consistently achieving high standards, both in the work you do and the way you behave.
- Being professional helps you to achieve high-quality results while impressing and inspiring others – and feeling good about yourself.
- The eight core characteristics of professionalism are competence, knowledge, conscientiousness, integrity, respect, emotional intelligence, appropriateness, and confidence.
- By finding ways to strengthen each of these attributes, you can become confident to act professionally wherever you find yourself working.
- These qualities are particularly important when the normal “rules” of professionalism are blurred, such as when you’re working from home.

Watch “The Five Zones of Professional Etiquette” YouTube video below to learn about professional etiquette.<sup>19</sup> Closed captioning is available on YouTube.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=50#oembed-3>

## ***Ability to Learn Continuously***

“To provide the right answers, you must know your product, service, or advocacy issues extremely well. Familiarize yourself with how the product works, special features and other uses, and your company’s policies on warranties, returns and exchanges. If you are discussing a service, know the limitations and mention them in a positive manner at the appropriate time. There is no substitute for product knowledge when it comes to selling a product or service.”<sup>20</sup>

## ***Ability to Maintain a Positive Attitude***

**A positive attitude** is a mindset that helps you see and recognize opportunities. It is not always easy to stay positive especially when things do not go as planned, or when dealing with angry customers. There are some practices you can put into place to help you stay positive throughout the day. Of course, being positive does not mean ignoring problems, it means dealing with whatever comes your way with an open-minded, solution-seeking, and forward-thinking attitude.

To maintain a positive outlook throughout each day, try these daily rituals:

- **Eat a nutritious breakfast.** Breakfast can set you up for a happier, more positive day. As well, it can boost your metabolism, cognitive functions, and reduce fatigue.<sup>21</sup>
- **Exercise.** When you exercise, the brain excretes chemicals that will boost your mood, and are proven to help to relieve both anxiety and depression.<sup>22</sup> Most people associate exercise with running, playing a sport, or working out in a gym, but exercise might also be doing yoga, dancing, gardening, or washing the car.
- **Smile.** Smiling can trick your brain into happiness—and boost your health.<sup>23</sup>
- **Listen to music.** Music increases happiness, decreases stress, improves sleep, reduces depression, and may strengthen learning and memory.<sup>24</sup>
- **Practice gratitude.** In positive psychology research, gratitude is strongly and consistently associated with greater happiness. Gratitude, focusing on and being thankful for what you have, helps people feel positive emotions, relish good experiences, improve their health, deal with adversity, and build strong relationships.<sup>25</sup>
- **Positive visualization.** To put visualization in a real life situation, if you have a big assignment or project due, visualize yourself finishing it and handing it in, and feeling that sense of relief and happiness.<sup>26</sup>
- **Practice one random act of kindness each day.** Kindness promotes empathy and compassion; which in turn, leads to a sense of interconnectedness with others. It releases positivity: We feel better and the recipients of our acts feel better, which then makes them more likely to be kind to other people. Simply buying the next person in a line a coffee, or holding the door open for someone with their hands full, or letting someone skip ahead of you at the cash check-out can release an enormous chain of positive events.<sup>27</sup>
- **Surround yourself with positive people.** You cannot have a life of positivity while spending a lot of time with people who drag you down. The good news is that there is a simple solution! Surround yourself with people who build you up and make you the best version of you.<sup>28</sup>
- **Practice mindfulness/meditation.** Perhaps the most widely publicized benefit of meditation is that it makes you happier and more productive. Many studies have found that practicing mindfulness was “strongly related” to a positive state of mind and reduced stress.<sup>29</sup>



*Photo by Klimkin from Pixabay*

## ***Ability to Manage Stress***

Identifying what causes you stress will help you manage stress. Managing your time will help you reduce stress; so keeping a calendar and recording when you have appointments or meetings, etc. will help you reduce stress by not panicking when you forget something that you need to do or somewhere you need to be.

Many of the rituals you may do to maintain a positive attitude will also help you reduce stress. Eating healthy foods and getting enough rest will help you have the strength you need to deal with stressful situations. Exercising regularly, doing yoga or meditation will also help you deal with stress better. Seek out social or professional support when needed and do not rely on drugs or alcohol to relieve stress as this may lead to bigger issues.

When dealing with difficult customers you can take a deep breath, count to three in your head, then address the customer in a calm and professional manner. Remember when a customer is angry is usually is not at you personally; their frustrated and upset about some interaction they had with the company. Ignore any personal attacks and exaggerations because a very angry, upset customer may not be acting rationally. Call your manager if the situation escalates and remember not to take it personally. Often upset customers are really nice people underneath it all, and once you fix the issue, they will probably thank you profusely. “Uncovering their expectations will help defuse the emotion, help you keep cool, and keep the conversation focused on problem-solving. Keep focusing on what you can do to close the gap between their unmet expectations and their experience of your company’s services and products. When customers are dealt with sincerely and professionally, they are more open to alternative solutions.”<sup>30</sup>

Try to keep a positive attitude and, in your personal life, surround yourself with others who think positively. Accept that there are events that you cannot control. Be assertive instead of aggressive by asserting your feelings, opinions, or beliefs instead of becoming angry, defensive, or passive. Do something every day that brings you joy.

## ***Ability to Manage Time***

Managing your time will make you more productive and reduce stress. Use a calendar or schedule book, whether paper or electronic, to keep track of tasks you need to complete. Make a list, assess the value of each task and prioritize tasks, and allow for flexibility.

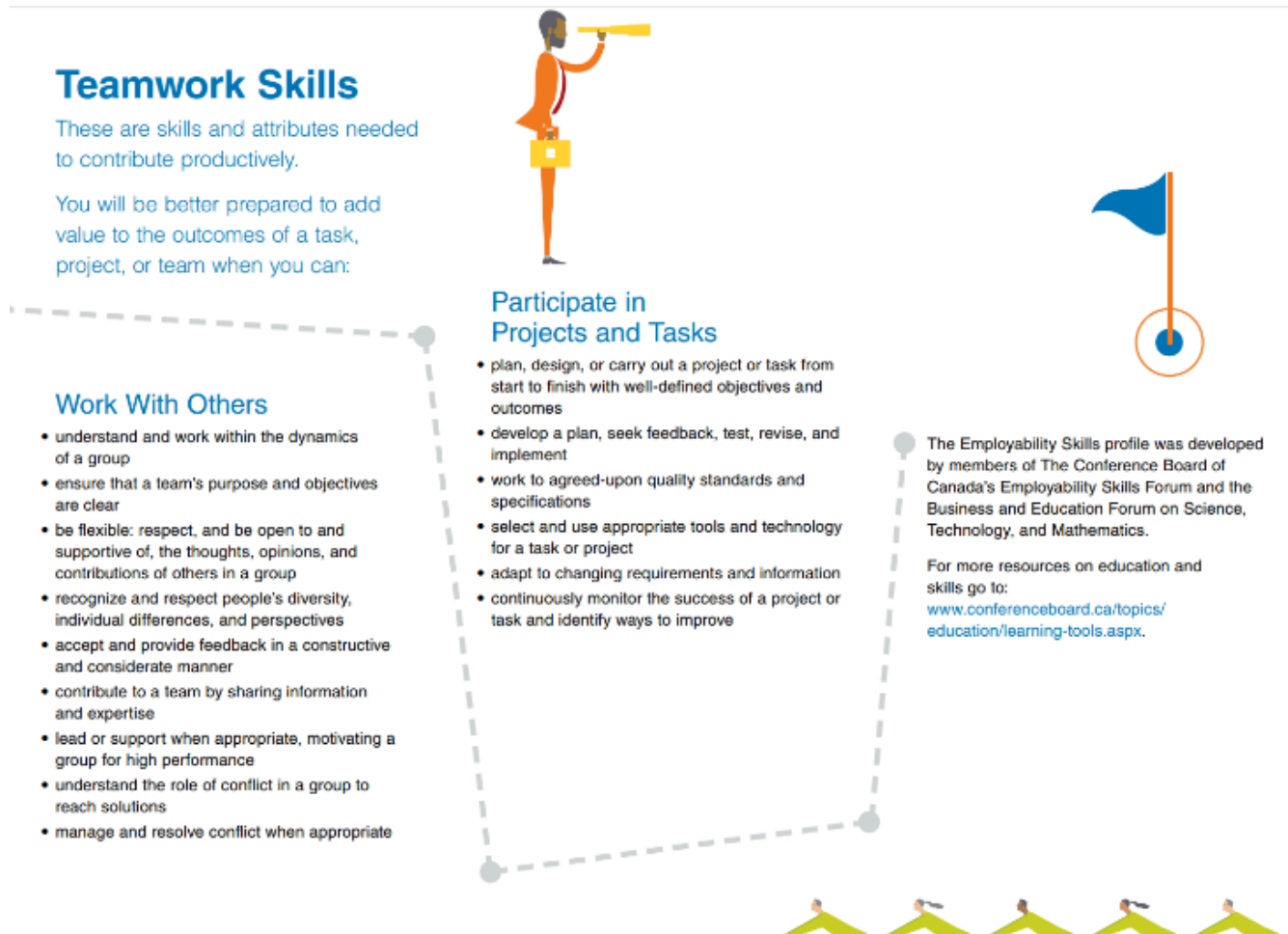
Watch the “Time Management Techniques for Stress Free Productivity” YouTube video below for some time management tips for stress-free productivity.<sup>31</sup> Closed captioning is available on YouTube.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=50#oembed-8>

## Ability to Work in Teams Effectively

In its Employability Skills 2000+, the Conference Board of Canada lists “the skills you need to enter, stay in, and progress” in the 21st century workplace. The ability to apply teamwork skills is one of the skills listed.<sup>32</sup>



Conference Board of Canada, *Employability Skills 200+*, *Teamwork Skills*.

## ***Characteristics of an Effective Team Member***

- Shows commitment to the team and its goals
- Works for consensus on decisions
- Shares openly and authentically with others
- Demonstrates reliability to complete tasks
- Involves others in the decision-making process
- Treats others in a respectful and supportive manner
- “Owns” problems rather than blaming them on others
- Listens actively, and attempts to see other’s points of view
- Encourages the development of other team members
- Cooperates and pitches in to help
- Acknowledges and works through conflict constructively
- Considers and uses new ideas and suggestions from others
- Encourages and accepts feedback on their own behavior
- Works toward win-win results

## ***Ability to Contribute to Team Performance***

To be a good contributor you must make an effort to support your team members and show interest in working toward team goals. You should learn to compromise and understand things may not always be done as you suggest. You need to be able to negotiate with your team members to settle disputes and make sure everyone is happy with the team’s choices.

Clearly communicating in a timely fashion with team members, and making sure your tone is always professional but friendly, is key to being a positive team contributor.

The bigger the project, the more linked and interdependent are the people and the tasks. Often one task must be done before another one can be completed. This means relying on each other and trusting each other to do what needs to be done in the time given. Your quality of work and ability to meet milestones (intermittent deadlines) are critical to everyone getting their part of the project done on time and with quality results.

## ***Ability to Participate in Team Presentations***

To present as a team, you must know each person’s part of the presentation so that should someone need help or become ill the day of the presentation you can step up and present their portion of the overall presentation. You should introduce each member of your team when you begin the presentation and have an introduction. Then as each member presents you use a transition between members; which is simply a sentence to transition from one member’s part to the next.

Each member will accept a task and complete their portion of the presentation, but also help the whole team finalize and make a professional final presentation. When using slides ensure there are no spelling errors and that each slide does not contain too much text. If giving presentations is a part of your job role then it would be wise to review a course or lesson on how to deliver a presentation.

### *Ability to Participate in Team Meetings*

Team meetings are crucial for sharing ideas, disseminating data to everyone at the same time, allowing for discussions, and making decisions. It is important to create an agenda for the meeting and send it out to all members prior to the meeting along with any accompanying documents that may be reviewed during the meeting. This will help keep the meeting discussion on track and moving forward. Often people complain that meetings are a waste of time because nothing gets accomplished. Using an agenda will help the meeting planner get through the tasks intended.

### *Ability to Participate in Projects and Tasks*

Ability is what you're capable of doing. Motivation determines what you do. Attitude determines how well you do it. It is important to participate in projects and tasks contributing to the team effort even when you are not that interested in your job or the project itself; otherwise, your colleagues and managers may get a negative impression of you which will only hurt your ability to get promotions, bonuses, recognition or work on interesting projects you may wish to be included on. Even if you plan to switch jobs in the near future you may need references from your manager and possibly colleagues so you certainly do not want anyone to see you as non-participative, difficult to get along with, lacking in team spirit, or providing a low quality of work.

## Key Takeaways

1. **Internal customers** are the company employees who need support, information or action from another employee. These internal customers may work just down the hall, in another building, or in another country, but they are still part of the company and working to help satisfy external customers.
2. **External customers** are the customers who purchase products or services from the company.
3. **Customer Service Orientation** means that as an employee you are able to display positive attitudes and behaviors, and demonstrate an awareness of the importance of meeting or exceeding customer needs and expectations.

4. **Service culture** in an organization means putting customers at the center of the business model, developing policies, procedures, values, norms, and beliefs that are centered around focusing on customer satisfaction and understanding their needs and wants.
5. **Verbal communication** refers to the ability of a customer service representative to think of the right words in order to appease a customer and provide a solution
6. **Non-verbal communication** refers to gestures, facial expressions, eye contact, body language, posture, and other ways people can communicate without using language.
7. **Positive language** is the art of using words and phrases to communicate a positive, supportive tone to your customers (or anyone else for that matter).
8. **Active listening** means that you focus on what your customer is saying.
9. A **problem-solving model** provides you with concrete, easy to remember steps you can work through when faced with any issue, customer service related or other.
10. A **positive attitude** is a mindset that helps you see and recognize opportunities. It is not always easy to stay positive especially when things do not go as planned, or when dealing with angry customers.
11. **Service recovery** is a company's resolution of a problem from a dissatisfied customer, converting them into a loyal customer. It is the action a service provider takes in response to service failure.
12. To be a **valued team member** you should make a commitment to the team goals, create a collaborative working environment, and support team decisions.
13. Identifying what causes you **stress** will help you manage stress.
14. Managing your **time** will help you reduce stress; so keeping a calendar and recording when you have appointments or meetings, etc. will help you reduce stress by not panicking when you forget something that you need to do or somewhere you need to be.

## End-of-Chapter Exercises

1. **Cultural Diversity.** Understanding cultural diversity in customer service. Search the Internet for differences between cultures and how these differences might affect working relationships between colleagues, interactions with customers, or even interactions with your manager. Searching for power distance, high and low cultural context, individualistic versus communitarian, deductive versus inductive persuasion, time scheduling, and neutral versus emotional cultures will provide you with several starting points.
2. **Jobs.** Search the Internet for "customer service jobs in Toronto" or whatever city you live in. You will probably get many websites in the results. Click on a few and review the job responsibilities, the hourly pay, and the skills you need to perform these jobs. Do any of them interest you? Why or why not? You may find some of these jobs have perks. They offer training and sometimes career paths to a management position. It is a good idea to research the company websites offering these jobs and read more about their mission and values to determine if you would be a good fit.

3. **Practice Pleasantries.** Give yourself a challenge. The next four people you interact with practice saying, please and thank you, and smiling. Do these at the right times, not too much, and not insincerely. Did these small pleasantries enhance your communication? Will you try this more often? Hopefully you will try this when serving customers.
4. **Angry Customers.** Search the Internet for information on “providing customer service to irate customers.” You might try rewording the search criteria using the following topics: conflict resolution, handling difficult customers, and handling angry customers. Share your findings with your class and/or professor.
5. **Service Breakdowns.** Based on your personal experience, why do you think service recovery efforts are often limited in small companies as compared to large organizations? What can be done to better prepare employees of a small company to better handle service breakdowns?
6. **Negative Phrases.** Consider negative phrases. What else could you say to a customer besides, “It’s not my department.” “It’s not my fault.” “She’s away and won’t be back for two weeks and she’s the only one who does that so you will have to wait.” “That’s not our policy.” Discuss these with a partner and see if you can devise some alternative statements that are more positive in tone and bring more value to the customer. Share your examples with the class and/or professor.
7. **Roleplay Difficult Situation.** Roleplay a Difficult Customer Situation. How would you handle this difficult customer situation? Assume you work as a cashier at Loblaw’s Super Store and as you are scanning a customer’s products for purchase a second customer squeezes up through the line of customers waiting and says, “I am in a hurry and I just have this loaf of bread. Can you just tell me how much it costs and I’ll leave the money right here on the register?” Work with a partner and role-play this scenario, practice how you would handle this situation if you were the employee. Discuss strategies with the class and/or professor.
8. **Gestures.** Gesture Meanings Around the World. Common gestures take on different meanings around the world. As a customer service representative, you may think giving the “thumbs up” to your customer means great, good, OK, but depending on where you are in the world or the culture your customer comes from, you may actually be offending them. Explore the Internet to discover what these gestures mean in different countries. Some countries to compare include: Canada, China, Russia, Mexico, Turkey, India, Greece, and Australia.

## Self-Check Exercise – Change Negative to a Positive



*An interactive H5P element has been excluded from this version of the text. You can view it*

online here:

<https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=50#h5p-2>

## Additional Resources

1. LinkedIn Learning Customer Service Training
2. I was Seduced by Exceptional Customer Service, John Boccuzzi, TedX Bryant U
3. 20 Training Ideas for Effective Customer Service
4. Test your communication skill level with a quiz
5. 17 Hand Gestures That Can Cause Offense Around the World
6. How to Get a Job in Customer Service
7. 5 Important Reasons Why Teamwork Matters
8. 15 Time Management Tips for Achieving Your Goals
9. Stress Management by Mayo Clinic Staff

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(Note: This reference list was produced using the auto-footnote and media citation features of Pressbooks; therefore, the in-text citations are not displayed in APA style).

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# Chapter 3: Leading a Customer Centric Strategy

## *Learning Objectives*

After reading this chapter, you should be able to do the following:

1. Define leadership and distinguish it from management, and explain how different leadership styles influence customer service.
2. Describe organizational culture, including how values, beliefs, and behaviors shape the customer experience.
3. Identify the characteristics of a strong customer service vision.
4. List sources for establishing quality standards.
5. Discuss why it is important to use the right metrics when measuring customer service quality.

## **Build a Customer-Centric Structure and Culture**

“The uniquely cross-functional nature of effective customer-experience efforts puts a premium on smart governance. Adequately addressing the challenge requires a dedicated effort on three levels. First, a **customer centric leadership structure** must ultimately report to the chief executive and should be designed to stimulate cross-silo activity and collaboration. Second, leaders must commit to demonstrating behaviors and serving as role models to deliver customer-experience goals to frontline workers and refine and reinforce those goals over the long term. Finally, it is necessary to put in place the correct metrics and incentives that are critical for aligning typically siloed units into effective cross-functional teams.”<sup>1</sup>

Research conducted by customer service provider Arvato revealed that businesses tend to rate the customer experience their company delivers higher than consumers do.<sup>2</sup>

Despite the attention to customer experience that is widely stated in corporate missions, visions, and values, actions speak louder than vision statements. When it comes to resources and budget, CEOs tend to prioritize technology over people or process. Even when company leaders recognize that customer service could be better, they often will look to the latest technology to provide the solution without delving deeper into customers' true wants and needs, or gathering insights from frontline staff.<sup>3</sup>

Leaders have a huge impact on building a customer-centric culture. The leader must be customer obsessed and share those values and goals with the company employees. Does the leader walk the talk? Does the leader put customers first? Are products, services, and processes created with customer needs and wants shaping results? If the company is focused on short-term results or is investing in areas that do not improve the customer experience, employees will pick up on this and leaders will get behaviors from employees that are not customer focused. Leaders who want to deliver exceptional customer experiences need to invest in employee incentives that will steer performance toward exceptional service.

Watch “A Customer-Centric Culture Needs a Leader” YouTube video below to learn why leadership is so important to creating a customer-centric culture.<sup>4</sup> Closed captioning is available on YouTube.



*Photo by RODNAE Productions from Pexels*



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# Understanding Leadership & Organizational Culture

Before we can fully understand how to build a customer-centric culture, we must first establish the foundations that shape it—leadership and organizational culture.

## Defining Leadership

What is the difference between “management” and “leadership”? Sometimes the terms are used almost interchangeably, but there is an important difference between them. Management includes various aspects, one of which is the leadership function. Learning to distinguish between the two can help individuals evaluate and develop their leadership skills.

**Leadership** is about establishing a direction and influencing others to follow. **Management** is about successfully administering the many complex details involved in a business's operations. Leadership pursues change and challenges the status quo, whereas management seeks to control and provide stability within the existing circumstances.

Both management and leadership are necessary skills, and they often overlap with one another. In most settings, the role of a manager includes both leadership and management functions. Leadership skills are needed to set the vision, and management skills are needed to implement a plan to achieve that vision. Recognizing the difference between leadership and management, however, can help individuals focus on developing their skills in both arenas. The greatest success comes when strong leadership is paired with effective management.

## Leadership Styles

It's fairly easy to open the doors of a business, assign tasks to employees, and serve the first customers—but that doesn't mean the service will be excellent. What if your instructions are unclear, ignored, or interpreted differently by each employee? Maybe your team doesn't like your approach and starts to disengage. On top of everything else, you don't simply want to complete transactions; you want to inspire your employees to deliver outstanding customer experiences. How do you accomplish this goal? How do you become an effective leader, and what style should you use to motivate others to achieve organizational goals?

Unfortunately, there are no definitive answers to questions like these. Over time, every manager refines their own **leadership style**, or way of interacting with and influencing others. Despite a vast range of personal differences, leadership styles tend to reflect one of the following approaches to leading and motivating people: the autocratic, the democratic (also known as participative), or the free rein.

- **Autocratic style.** Managers who have developed an autocratic leadership style tend to make

decisions without soliciting input from subordinates. They exercise authority and expect subordinates to take responsibility for performing the required tasks without undue explanation.

- **Democratic style.** Managers who favor a democratic leadership style generally seek input from subordinates while retaining the authority to make the final decisions. They're also more likely to keep subordinates informed about things that affect their work.
- **Free-rein style.** In practicing a free rein leadership style, managers adopt a "hands-off" approach and provide relatively little direction to subordinates. They may advise employees but usually give them considerable freedom to solve problems and make decisions on their own.

At first glance, you'd probably not want to work for an autocratic leader. After all, most people don't like to be told what to do without having any input. Many like the idea of working for a democratic leader; it's flattering to be asked for your input. And though working in a free rein environment might seem a little unsettling at first, the opportunity to make your own decisions is appealing to many people. Each leadership style can be appropriate in certain situations.

To illustrate, let's say that you're leading a group of fellow students in a team project for your class. Are there times when it would be best for you to use an autocratic leadership style? What if your team was newly formed, unfamiliar with what needs to be done, under a tight deadline, and looking to you for direction? In this situation, you might find it appropriate to follow an autocratic leadership style (on a temporary basis) and assign tasks to each member of the group. In an emergency situation, such as a fire, or in the final seconds of a close ball game, there is generally not time for debate—the leader or coach must make a split second decision that demands an autocratic style.

But since most situations are non-emergency and most people prefer the chance to give input, the democratic leadership style is often favored. People are simply more motivated and feel more ownership of decisions (i.e., buy-in) when they have had a chance to offer input. Note that when using this style, the leader will still make the decision in most cases. As long as their input is heard, most people accept that it is the leader's role to decide in cases where not everyone agrees.

How about free rein leadership? Many people function most effectively when they can set their own schedules and do their work in the manner they prefer. It takes a great deal of trust for a manager to employ this style. Some managers start with an assumption of trust that is up to the employee to maintain through strong performance. In other cases, this trust must be earned over a period of time. Would this approach always work with your study group? Obviously not. It will work if your team members are willing and able to work independently and welcome the chance to make decisions. On the other hand, if people are not ready to work responsibly to the best of their abilities, using the free rein style could cause the team to miss deadlines or do poorly on the project.

The point being made here is that no one leadership style is effective all the time for all people or in all corporate cultures. While the democratic style is often viewed as the most appropriate (with the free rein style a close second), there are times when following an autocratic style is essential. Good leaders learn how to adjust their styles to fit both the situation and the individuals being directed.

## Transformational vs. Transactional Leadership

Theories on what constitutes effective leadership evolve over time. One theory that has received a lot of attention in the last decade contrasts two leadership styles: transactional and transformational. So-called **transactional leaders** exercise authority based on their rank in the organization. They let subordinates know what's expected of them and what they will receive if they meet stated objectives. They focus their attention on identifying mistakes and disciplining employees for poor performance. By contrast, **transformational leaders** mentor and develop subordinates, providing them with challenging opportunities, working one-on-one to help them meet their professional and personal needs, and encouraging people to approach problems from new perspectives. They stimulate employees to look beyond personal interests to those of the group.

So, which leadership style is more effective? You probably won't be surprised by the opinion of most experts. In today's organizations, in which team building and information sharing are important and projects are often collaborative in nature, transformational leadership has proven to be more effective. Modern organizations look for managers who can develop positive relationships with subordinates and motivate employees to focus on the interests of the organization. Leaders who can be both transactional and transformational are rare, and those few who have both capacities are very much in demand.[12]

## Defining Organizational Culture

**Organizational culture** is a term that can relate to any organization at all, from a church to a university. When talking about the culture of a business, you'll often hear the term "corporate culture." **Corporate culture** is, according to *INC Magazine*: the shared values, attitudes, standards, and beliefs that characterize members of an organization and define its nature. Corporate culture is rooted in an organization's goals, strategies, structure, and approaches to labor, customers, investors, and the greater community. As such, it is an essential component in any business's ultimate success or failure.[1]

Like families (or nations), corporations have cultures. Sometimes those cultures "just happen." All too often, when corporate culture is not intentionally created, the culture winds up being disjointed or even antagonistic. Employees are all working toward different goals, in different ways, with different approaches. For instance, although Antonio is dedicated to the idea of crafting quality products, Leila is eager to sell as much product as possible (even if the quality is only so-so). Meanwhile, Tyler thinks the company should start making a wider range of products and is trying to push his ideas forward during sales meetings.

The idea of corporate culture developed from our knowledge of national, regional, and family cultures, and many theories exist about what makes a good (or poor) corporate culture. To get an idea of what a corporate culture looks like, think about families you know well. Some are formal whereas others are easygoing. Some work together toward shared goals whereas others encourage

individuality and independence. Some are always having fun whereas others seem to be in a permanent state of internal conflict. We can describe corporate cultures in similar ways.

Although some businesses give little thought to corporate culture, many successful companies have cultures that are intentionally created or tweaked. Sometimes corporate cultures are the result of a founder's personal vision. But just as often, corporate cultures are created through a collaborative effort that involves not only upper management but also managers and employees.

## Corporate Culture as a Competitive Advantage

Why is it so important to have a strong, positive corporate culture? There are three good reasons:

- A strong culture helps employees, customers, and the general public to identify your corporate values. Say, for example, that your company culture values innovation. In that case, your employees will know that they will be encouraged to come up with new ideas—and your customers will know that your products and services are likely to have a creative or unique quality.
- Companies with strong, coherent cultures attract high-quality employees who believe in the same values as the corporation. Once those employees come on board, they start to feel that they “belong” because they are part of a shared culture. Employees who feel that their jobs are a great match for their personal values are more likely to be loyal to their employers. After all, they are doing what they enjoy doing for an organization that shares their ideals and goals.
- A strong corporate culture can help a corporation to build its brand. For example, Starbucks has built a culture and brand that includes very public dedication to international fair trade. Customers who care about fair trade are more likely to buy from—and stay loyal to—Starbucks.

With strong leadership and a clear organizational culture in place, the next step is ensuring that customer experience becomes a true priority across the business. Once customer experience is established as the guiding focus, companies can then develop a service vision that unites employees around shared goals.

## Make Customer Experience a Priority

Leaders in customer experience pursue a range of approaches to overcome such complexity of making the customer experience a priority. Several elements form the core of their successful efforts. They include the following:<sup>5</sup>

1. **Set up a dedicated team for customer experience.** This allows a company to maintain a continuous focus on customer experience across segments, brands, geographies, and functional areas.
2. **Establish C-suite engagement.** Given the cross-functional collaboration required, the CEO

must make the customer experience an active priority.

3. **Fit the customer-experience team into the organizational fabric.** If not, customer experience transformation efforts may drown in a sea of organizational confusion.

“Disney makes use of a simple leadership framework that links the delivery of business results to customer satisfaction and measures that satisfaction via two key indicators: “propensity to return” to a Disney experience and “propensity to recommend.” Disney’s framing also stipulates that the way to satisfy customers is through engaged employees. For Disney’s business leaders, the logic is clear: their task is to develop excellent employees, who in turn help to create satisfied customers, leading to business results.”<sup>6</sup>

## Apply Leadership Principles

To create a customer-centric organization, leaders apply the following principles:

1. **Model specific behaviors.** Managers must walk the walk. Customer centricity is taught to agents and should be supported in the company vision, mission, and values as well as modelled by management.
2. **Foster understanding and commitment among employees and managers.** Making a connection between improved customer satisfaction and bottom-line financial results will help all employees understand the importance of exemplary customer service.
3. **Develop capabilities and skills.** Train agents in customer-centric behaviors, but also train management so they are able to coach and support the team. Hire for fit.
4. **Reinforce behaviors through formal mechanisms.** Financial incentives can help, but nonfinancial recognition schemes are more powerful.

Watch “The 8 Habits of Customer-Centric Leaders” YouTube video to learn what customer-centric leaders do.<sup>7</sup> Closed captioning is available on YouTube.

<https://youtu.be/lqo6IEgnD2E>

## Create a Customer Service Vision

Companies with strong service cultures take the time to clearly define what outstanding service means to them. They do this in their mission and vision statements, in their employee training, in their advertising, and in the behavior of their managers and leaders. They ensure their products, services, and processes are designed with consumer wants and needs in mind. Being **customer-centric** means that every department in the company understands that the customer comes first and everything they do is to obtain, retain, and build relationships with customers.

A **customer service vision** is a shared definition of outstanding service that gets all employees working in the same direction. A strong customer service vision has three characteristics:<sup>8</sup>

1. **It's simple and easy to understand.** A vision should not be too complicated or too long; it should bring clarity so all employees can understand it and act accordingly.
2. **It's focused on customers.** Focusing on profit or expanding market share may be the end goal, but customer focused companies achieve those goals by focusing on their customers.
3. **It reflects who the company is now, and who the company aspires to be in the future.** It should be grounded in reality so the vision feels authentic to employees. It's about what is working for the company now and what the company will build upon for the future.

### Example vision statements:

Amazon – “To be Earth’s most customer-centric company, where customers can find and discover anything they might want to buy online.”<sup>9</sup>

Disney – “To make people happy.”<sup>10</sup>

IKEA – “To create a better everyday life for the many people.”<sup>11</sup>

Loreal – “To provide the best in cosmetics innovation to women and men around the world with respect for their diversity.”<sup>12</sup>

Microsoft – “To help people throughout the world realize their full potential.”<sup>13</sup>

Starbucks – “To inspire and nurture the human spirit – one person, one cup and one neighborhood at a time.”<sup>14</sup>

Zappos – “To provide the best customer service possible. Deliver ‘WOW’ through service.”<sup>15</sup>

## Engage Employees with the Customer Service Vision

Employees need to know that organizational success is defined by the customer service vision. Engaged employees help fulfill the vision with the customers they serve. There are three questions you can ask employees to **evaluate employee engagement** in a customer centric organization.<sup>16</sup>

1. **What is the customer service vision?** Employees need to know it and where it is. It may be in a



Photo by RODNAE Productions from Pexels

book, online, written on a poster, or in some other location.

2. **What does the customer service vision mean?** Employees should more than just memorize it, they should be able to explain it in their own words.
3. **How do you personally contribute?** Employees should be able to describe how their individual role contributes to fulfilling the vision.

The customer service vision should be formally announced or introduced by the CEO or a high-ranking manager. Companies must hire for the right fit; hire candidates who agree with or have personal goals aligned with the company vision. Training should then be provided to employees to help them understand how their role aligns with the company's customer service vision. Ensure employees receive some one-to-one coaching from their immediate supervisor as needed. The goal is to verify that employees can answer all three of the above questions consistently. Finally, empower employees to enable them to provide excellent customer service and care and sure company leaders are demonstrating their belief in the vision through their everyday behaviors, discussions, and decisions they make.

## Empower Employees to Deliver the Customer Service Vision

**Employee empowerment** means giving employees the authority, right technology, systems, and freedom to go the extra mile to make customers happy. This requires thorough training of customer service teams to enable employees to identify and act on the opportunities to enhance the quality of support. Giving employees ownership for their own work will not only boost motivation but also increase service quality, team productivity, and quick decision-making.<sup>17</sup>

Empowerment doesn't mean allowing employees to do whatever they want. It means enabling them to deliver service that's consistent with the customer service vision. Empowered employees need resources to serve their customers, best-known procedures for serving consistently and efficiently, and the appropriate level of authority to handle unusual or unexpected situations.<sup>18</sup>

Empower employees in the following ways:

- Educate the frontline call center agents on branding, culture, and values so they deliver service that is consistent with these values.
- Provide agents with a 360-degree view of customers so they can make data-driven decisions.
- Equip agents with the right tools so they can resolve issues at the first point of contact.
- Cultivate innovation by encouraging autonomy and creative problem-solving.
- Make agents an integral member of the organization so they are proud to provide amazing service.<sup>19</sup>

Watch the "Customer Experience: Empower Employees with Decisions" YouTube video below to learn more about employee empowerment.<sup>20</sup> Closed captioning is available on YouTube.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=58#oembed-2>

## Set SMART Goals Aligned with the Customer Service Vision

Set goals that are SMART – Specific, Measurable, Attainable, Realistic (Relevant), and Time-bound. Goals for agents should be clear and attainable. Goals for the contact center should be realistic. All goals should be time-bound and performance measured.

If agents are rewarded, for example, for the number of calls they complete each day, then employees may rush to finish a call to take another one. This may reduce customer satisfaction and may leave some customers without their problems resolved. That would be an example of setting a bad goal. If time is measured on each call and an expectation or limit is set, then some agents might transfer the call or end the call before the customer issue is resolved, leaving the customer with a poor image of the company's customer service. Again, an example of a bad goal. Good goals rely on intrinsic or internal motivation while bad goals rely on extrinsic motivation like incentives.

“Many organizations use a number of metrics to evaluate customer service and overall performance. These metrics might include customer satisfaction, productivity, or even revenue. Goals can be an important signal to employees about what to focus on and how to prioritize their work. The danger is some goals can push employees away from the customer service vision rather than towards it.”<sup>21</sup>

## Create Quality Standards

**Customer service standards** refer to the performance that customers can expect from the company. It encompasses various factors, like speed, accuracy, transparency, accessibility, empowerment, efficiency, and friendliness of the staff.<sup>22</sup>

There are many benefits to improving quality and customer service, including a positive impact on customer loyalty, revenues, profitability, word of mouth, and employee engagement to name just a few. What constitutes good, bad, and exceptional customer service must be defined by what customers expect. **Quality** is simply the attributes of a product or service. **Standards** are for the requirements, specifications, guidelines, or characteristics established for customer service. They should reflect and provide guidance on what needs to happen, and what we want to apply or replicate across all customer interactions. **There are three sources for establishing quality standards:**<sup>23</sup>

1. **Customer expectations.** But these are always changing so companies must continually

innovate. Meeting customer expectations is a combination of people, processes, and technologies.

2. **The organization's mission, vision, and values.** Quality standards should support or align with these.
3. **Stakeholders** such as government, suppliers, employees, shareholders, industry associations, community (and customers, but customers are in a category of their own).

“Customers frequently rank consistency as a primary driver of good customer service. To monitor the quality and consistency of your team’s replies, consider implementing quality assurance or conversation reviews. Providing ongoing feedback through reviews can ensure that your entire team is delivering excellent customer service.”<sup>24</sup>

Sometimes there is resistance to creating quality standards as some managers feel these standards are too rigid and unnecessary. The best way to combat resistance is to demonstrate what quality is and the costs when quality is lacking.

## Use Metrics that Matter

“Enhancing your organization’s customer-centricity would be next to impossible without data. In order to make decisions that will positively impact your customers, your front-line staff, managers, and executives must be referencing real-time and historical data. Enhance customer-centricity by:<sup>25</sup>

- Utilizing point-of-service (POS) and customer relationship management (CRM) software that provides comprehensive metrics.
- Empowering front-line with real-time and historical data so they can make informed decisions that enhance the customer experience.
- Analyzing key performance indicators (KPIs) and making decisions based on these metrics.
- Creating a culture of continuous data-driven improvement.
- Ensuring that metrics are aligned to the customer lifecycle and key touchpoints (e.g., Customer Lifetime Value, Net Promoter Score, etc.).
- Connecting staff feedback and performance evaluations to metrics.

Modern, customer-centric organizations recognize the importance of measuring customer experience and staff behavior more than quantitative metrics. Adopting a customer-centric approach to management does not imply that there should be no productivity-based measures in place. Instead, it means that organizations should emphasize more on improving customer satisfaction.<sup>26</sup>

Watch the “How to Reduce AHT in a Call Center” YouTube video below to learn more about reducing average handling time in a call center.<sup>27</sup> Closed captioning is available on YouTube.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=58#oembed-3>

Of course, every company should measure performance in alignment with quality standards, and much of this is done through metrics and using technology. There are other ways to assess the quality of service interactions, some of which include: observation, role-play, coaching sessions, recorded interactions, customer input, and mystery shoppers who use services and provide reports.

When measuring the degree to which quality standards are being met it is important to consider the scoring system as it should directly reflect your quality standards and behaviors you want to encourage. A flawed system may, in practice, under-emphasize critical behaviors and over-emphasize non-essential skills. You'll need to test and modify accordingly.<sup>28</sup>

## Key Takeaways

1. A **customer-centric leadership structure** must ultimately report to the chief executive and should be designed to stimulate cross-silo activity and collaboration. Leaders must commit to demonstrating behaviors and serving as role models to deliver customer-experience goals to frontline workers and refine and reinforce those goals over the long term. Finally, it is necessary to put in place the correct metrics and incentives that are critical for aligning typically siloed units into effective cross-functional teams.
2. Leaders in customer experience pursue a range of approaches to overcome such complexity of **making the customer experience a priority**. Several elements form the core of their successful efforts. They include the following: Set up a dedicated team for customer experience, establish C-suite engagement, and fit the customer-experience team into the organizational fabric.
3. To **create a customer centric organization** leaders apply the following principles: Model specific behaviors, foster understanding and commitment among employees and managers, develop capabilities and skills, and reinforce behaviors through formal mechanisms.
4. Being **customer centric** means that every department in the company understands that the customer comes first and everything they do is to obtain, retain, and build relationships with customers.
5. A **customer service vision** is a shared definition of outstanding service that gets all employees working in the same direction. A strong customer service vision has three characteristics: It's simple and easy to understand, it's focused on customers, it reflects who the company is now, and who the company aspires to be in the future.

6. There are three questions you can ask employees to **evaluate employee engagement** in a customer centric organization: What is the customer service vision? What does the customer service vision mean? How do you personally contribute?
7. **Employee empowerment** means giving employees the authority, right technology, systems, and freedom to go the extra mile to make customers happy.
8. **Customer service standards** refer to the performance that customers can expect from the company. It encompasses various factors, like speed, accuracy, transparency, accessibility, empowerment, efficiency, and friendliness of the staff. **There are three sources for establishing quality standards:** Customer expectations, the organization's mission, vision, and values, and stakeholders such as government, suppliers, employees, shareholders, industry associations, and the community.
9. Previously, contact centers focused more on quantitative **metrics** such as Average Handling Time (AHT) and Calls per Hour. However, modern service centers recognize the importance of measuring customer experience and agent behavior more than quantitative metrics.

## End-of-Chapter Exercises

1. **Customer Service Standards.** Review the list of 7 Commonly Used Customer Service Standards. Which standard do you feel is the most important? Why? Discuss with your classmates and professor.
2. **Cross-Departmental Service.** Why is it important for quality customer care/service to be a cross-functional objective? Provide an example of serving a customer where cross-departmental input may be needed. Discuss with your classmates and professor.
3. **Reinforce Employee Behavior.** Search the Internet for ways to reinforce employee behavior beyond financial incentives. Would these strategies work for every employee? Why or why not? Discuss your findings with your classmates and professor.
4. **Model Behavior.** Search the Internet for ways in which managers can model customer-centric behaviors. Make a list and share it with your classmates and professor.
5. **Leadership Quiz.** Take a leadership quiz to determine your leadership style.
6. **Customer Service Quiz.** Take a quiz to evaluate how well your team delivers customer service.

## Self-Check Exercise – Leading a Customer Centric Strategy



*An interactive H5P element has been excluded from this version of the text. You can view it online here:*

<https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=58#h5p-3>

## Additional Resources

1. 15 Steps to Becoming the Best Team Leader in the Call Center Industry, YouTube Video
2. How Many Agents Do You Need? YouTube Video
3. How Companies Can Achieve True Customer Centricity, YouTube Video
4. An Introduction to Customer Centricity at Google, YouTube Video
5. Customer Centric Culture Change, YouTube Video
6. Beyond the Trends: Developing a Customer-Centric Retail Mindset in B2C & B2B, YouTube Video
7. Service Metrics for Customer Service, LinkedIn Learning
8. Leading a Customer Centric Culture, LinkedIn Learning
9. Customer Service Leadership, LinkedIn Learning

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(Note: This reference list was produced using the auto-footnote and media citation features of Pressbooks; therefore, the in-text citations are not displayed in APA style).

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# Chapter 4: Verbal Communication

## *Learning Objectives*

After reviewing this information, you will be able to

1. Explain the importance of effective communication in customer service.
2. Identify the 8 essential components of the communication process.
3. Identify the five stages of a conversation and general strategies for improving conversation skills.

## **Workplace Communication**

Communication is an activity, skill, and art that incorporates lessons learned across a wide spectrum of human knowledge. Perhaps the most time-honored form of communication is storytelling. We've told each other stories for ages to help make sense of our world, anticipate the future, and certainly to entertain ourselves. The art of storytelling draws on your understanding of yourself, your message, and how you communicate it to an audience that is simultaneously communicating back to you. Your anticipation, reaction, and adaptation to the process will determine how successfully you are able to communicate. You were not born knowing how to write or even how to talk—but in the process of growing up, you have undoubtedly learned how to tell, and how not tell, a story out loud and in writing.

Effective communication takes preparation, practice, and persistence. There are many ways to learn communication skills; the school of experience, or “hard knocks,” is one of them. But in the business environment, a “knock” (or lesson learned) may come at the expense of your credibility through a blown presentation to a client. The classroom environment, with a compilation of information and resources such as a text, can offer you a trial run where you get to try out new ideas and skills before you have to use them to communicate effectively to make a sale or form a new partnership. Listening to yourself, or perhaps the comments of others may help you reflect on new ways to present or perceive, thoughts, ideas and concepts. The net result is your growth; ultimately your ability to communicate in business will improve, opening more doors than you might anticipate.

## Importance of Good Communication Skills

Communication is key to your success—in relationships, in the workplace, as a citizen of your country, and across your lifetime. Your ability to communicate comes from experience, and experience can be an effective teacher, but this text and the related business communication course will offer you a wealth of experiences gathered from professional speakers across their lifetimes. You can learn from the lessons they've learned and be a more effective communicator right out of the gate.

Both customer service and workplace communication can be thought of as a problem-solving activity in which individuals may address the following questions:

- What is the situation?
- What are some possible communication strategies?
- What is the best course of action?
- What is the best way to design the chosen message?
- What is the best way to deliver the message?

In this book, we will examine this problem-solving process and help you learn to apply it in the kinds of situations you are likely to encounter over the course of your career.

## Communication Influences Your Thinking about Yourself and Others

We all share a fundamental drive to communicate. Communication can be defined as the process of understanding and sharing meaning.<sup>1</sup> You share meaning in what you say and how you say it, both in oral and written forms. If you could not communicate, what would life be like? A series of never-ending frustrations? Not being able to ask for what you need or even to understand the needs of others?

Being unable to communicate might even mean losing a part of yourself, for you communicate your self-concept—your sense of self and awareness of who you are—in many ways. Do you like to write? Do you find it easy to make a phone call to a stranger or to speak to a room full of people? Perhaps someone told you that you don't speak clearly or your grammar needs improvement. Does that make you more or less likely to want to communicate? For some, it may be a positive challenge, while for others it may be discouraging. But in all cases, your ability to communicate is central to your self-concept.

Take a look at your clothes. What are the brands you are wearing? What do you think they say about you? Do you feel that certain styles of shoes, jewelry, tattoos, music, or even automobiles express who you are? Part of your self-concept may be that you express yourself through texting, or through writing longer documents like essays and research papers, or through the way you speak.

On the other side of the coin, your communication skills help you to understand others—not just their words, but also their tone of voice, their nonverbal gestures, or the format of their written documents provide you with clues about who they are and what their values and priorities may be. Active listening and reading are also part of being a successful communicator.

## Communication Skills Are Desired by Business and Industry

Oral and written communication proficiencies are consistently ranked in the top ten desirable skills by employer surveys year after year. In fact, high-powered business executives sometimes hire consultants to coach them in sharpening their communication skills. According to the National Association of Colleges and Employers, the following are the top five personal qualities or skills potential employers seek:<sup>2</sup>

1. Communication skills (verbal and written)
2. Strong work ethic
3. Teamwork skills (works well with others, group communication)
4. Initiative
5. Analytical skills

Knowing this, you can see that one way for you to be successful and increase your promotion potential is to increase your abilities to speak and write effectively. An individual with excellent communication skills is an asset to every organization. No matter what career you plan to pursue, learning to express yourself professionally in speech and in writing will help you get there.

## What is Communication?

Many theories have been proposed to describe, predict, and understand the behaviors and phenomena of which communication consists. When it comes to communicating in business, we are often less interested in theory than in making sure our communications generate the desired results. But in order to achieve results, it can be valuable to understand what communication is and how it works. All communication is composed of three parts that make a whole: sharing, understanding, and meaning.

**Sharing** means doing something together with one or more person(s). In communication, sharing occurs when you convey thoughts, feelings, ideas, or insights to others. You also share with yourself (a process called intrapersonal communication) when you bring ideas to consciousness, ponder how you feel about something, figure out the solution to a problem, or have a classic “Aha!” moment when something becomes clear.

The second keyword is **understanding**. “To understand is to perceive, to interpret, and to relate our perception and interpretation to what we already know.”<sup>3</sup> Understanding the words and the concepts or objects they refer to is an important part of the communication process.

Finally, **meaning** is what you share through communication. For example, by looking at the context of a word, and by asking questions, you can discover the shared meaning of the word and better understand the message.

Watch the following video to review types of communication.<sup>4</sup> Closed captioning is available on YouTube.



*One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=89#oembed-1>*

- Interpersonal communication is any message exchanged between two or more people.
- Written communication is any message using the written word.
- Verbal, or oral, communication is any message conveyed through speech.
- Nonverbal communication is any message inferred through observation of another person.

## Communications Process: Encoding and Decoding

In basic terms, humans communicate through a process of **encoding** and **decoding**. The encoder is the person who develops and sends the message. As represented in Figure 1.1 below, the encoder must determine how the message will be received by the audience, and make adjustments so the message is received the way they want it to be received.

**Encoding** is the process of turning thoughts into communication. The encoder uses a ‘medium’ to send the message — a phone call, email, text message, face-to-face meeting, or other communication tools. The level of conscious thought that goes into encoding messages may vary. The encoder should also take into account any ‘noise’ that might interfere with their message, such as other messages, distractions, or influences.

The audience then ‘decodes’, or interprets, the message for themselves. **Decoding** is the process of turning communication into thoughts. For example, you may realize you’re hungry and encode the following message to send to your roommate: “I’m hungry. Do you want to get pizza tonight?” As your roommate receives the message, they decode your communication and turn it back into thoughts to make meaning.

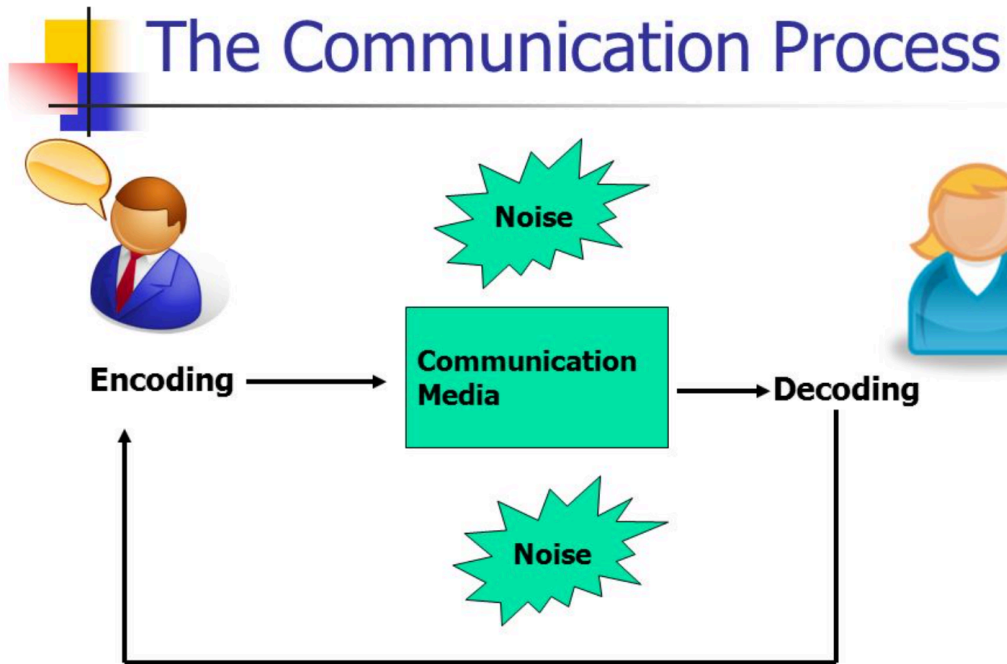


Figure 3. The communication process encoding, media, and decoding. The communication process: The sender selects the communication media and encodes a message which is decoded by the receiver decoding the message.ability to encode and decode messages. Adapted from "Chapter 12: Communication" [Power Point] by August Hawkins, SlidePlayer. Copyright 2015 by August Hawkins.

Of course, you don't just communicate verbally—you have various options, or channels, for communication. Encoded messages are sent through a channel, or a sensory route, on which a message travels to the receiver for decoding. While communication can be sent and received using any sensory route (sight, smell, touch, taste, or sound), most communication occurs through visual (sight) and/or auditory (sound) channels. If your roommate has headphones on and is engrossed in a video game, you may need to get their attention by waving your hands before you can ask them about dinner.

## Eight Essential Components of Communication

The communication process can be broken down into a series of eight essential components, each of which serves an integral function in the overall process:

1. Source

2. Message
3. Channel
4. Receiver
5. Feedback
6. Environment
7. Context
8. Interference

## Source

The source imagines, creates, and sends the message. The source encodes the message by choosing just the right order or the best words to convey the intended meaning and presents or sends the information to the audience (receiver). By watching for the audience's reaction, the source perceives how well they received the message and responds with clarification or supporting information.

## Message

"The message is the stimulus or meaning produced by the source for the receiver or audience."<sup>5</sup> The message brings together words to convey meaning but is also about how it's conveyed — through nonverbal cues, organization, grammar, style, and other elements.

## Channel

"The channel is the way in which a message or messages travel between source and receiver."<sup>6</sup> Spoken channels include face-to-face conversations, speeches, phone conversations and voicemail messages, radio, public address systems, and Skype. Written channels include letters, memorandums, purchase orders, invoices, newspaper and magazine articles, blogs, email, text messages, tweets, and so forth.

## Receiver

"The receiver receives the message from the source, analyzing and interpreting the message in ways both intended and unintended by the source."<sup>7</sup>

## Feedback

When you respond to the source, intentionally or unintentionally, you are giving feedback. Feedback is composed of messages the receiver sends back to the source. Verbal or nonverbal, all these feedback signals allow the source to see how well, how accurately (or how poorly and inaccurately) the message was received.<sup>8</sup>

## Environment

“The environment is the atmosphere, physical and psychological, where you send and receive messages.”<sup>9</sup> Surroundings, people, animals, technology, can all influence your communication.

## Context

“The context of the communication interaction involves the setting, scene, and expectations of the individuals involved.”<sup>10</sup> A professional communication context may involve business suits (environmental cues) that directly or indirectly influence expectations of language and behavior among the participants.

## Interference

Interference, also called noise, can come from any source. “Interference is anything that blocks or changes the source’s intended meaning of the message.”<sup>11</sup> This can be external or internal/psychological. Noise interferes with normal encoding and decoding of the message carried by the channel between source and receiver.

## Your Responsibilities as a Communicator

Whenever you speak or write in a business environment, you have certain responsibilities to your audience, your employer, and your profession. Your audience comes to you with an inherent set of expectations that is your responsibility to fulfill. The specific expectations may change given the context or environment, but two central ideas will remain: be prepared, and be ethical.

## Preparation

Being prepared means that you have selected a topic appropriate to your audience, gathered enough information to cover the topic well, put your information into a logical sequence, and considered how best to present it.

## Organization

Being organized involves the steps or points that lead your communication to a conclusion. Once you've invested time in researching your topic, you will want to narrow your focus to a few key points and consider how you'll present them. You also need to consider how to link your main points together for your audience so they can follow your message from point to point.

## Clarity

You need to have a clear idea in your mind of what you want to say before you can say it clearly to someone else. It involves considering your audience, as you will want to choose words and phrases they understand and avoid jargon or slang that may be unfamiliar to them. Clarity also involves presentation and appropriate use of technology.

## Conciseness

Concise means to be brief and to the point. In most business communications you are expected to 'get down to business' right away. Being prepared includes being able to state your points clearly and support them with trustworthy evidence in a relatively straightforward, linear way. Be concise in your choice of words, organization, and even visual aids. Being concise also involves being sensitive to time constraints. Be prepared to be punctual and adhere to deadlines or time limits. Some cultures also have a less strict interpretation of time schedules and punctuality. While it is important to recognize that different cultures have different expectations, the general rule holds true that good business communication does not waste words or time.

## The "Golden Rule"

When in doubt, remember the "golden rule," which is to treat others the way you would like to be treated. In all its many forms, the golden rule incorporates human kindness, cooperation, and reciprocity across cultures, languages, backgrounds, and interests. Regardless of where you travel,

with whom you communicate or what your audience is like, remember how you would feel if you were on the receiving end of your communication and act accordingly.

## Soft Skills

Your professional success depends on having advanced people (a.k.a. “soft”) skills because most jobs require you to talk to people. Key among these is skill in speaking to and conversing with others in person. Retail sales, for instance, requires the ability to listen carefully to what a customer says they want and “read” their nonverbals to determine what exactly to say and how to say it in order to close the deal with a purchase. Aside from a handful of jobs with minimal human interaction,<sup>12</sup> the vast majority require advanced soft skills to deal effectively with customers or clients, coworkers, managers, and other stakeholders. Though we’re not born with them, everyone has the capacity to learn, develop, practice, and apply verbal and nonverbal skills to benefit those audiences, their company as a whole, and themselves.

You’ve certainly participated in countless conversations throughout your life, and the process of how to conduct a conversation may seem so obvious that it needs no explanation. Still, you can tell that some are better than others at conversation and some argue that technology is preventing many from developing these skills, so it’s worth breaking down how an effective communicator approaches the art of conversation. A skilled professional knows when to speak, when to go silent and listen, as well as when to stop speaking before the audience stops listening. First, however, it’s worth examining the voice as the pre-eminent communication channel, how to refine our interpersonal skills in the face of the stunting effects of problem technology use, and how to use voice-only technology effectively.

## Verbal Communication Skills & Tools

Before diving into these topics, however, let’s review what face-to-face meetings are all about according to the table below.

## Channel: In-person Conversation and Meetings

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
In-person conversation	<ul style="list-style-type: none"> <li>• The most information-rich channel combining words and nonverbal messages</li> <li>• Dialogue facilitates immediate back-and-forth exchange of ideas</li> <li>• Maintains the human element lacking in most other channels</li> <li>• Additional participants can join for group discussion</li> </ul>	<ul style="list-style-type: none"> <li>• Requires that speakers travel to be physically in the same space together</li> <li>• Some people are poor listeners and some are poor speakers</li> <li>• Impermanent unless recording equipment is used</li> </ul>	<ul style="list-style-type: none"> <li>• Audience must be present and attentive rather than distracted by their mobile technology or multitasking</li> <li>• Use for genuine dialogue rather than monologue or shallow, superficial exchanges</li> <li>• A dynamic speaking ability is required to engage audiences</li> </ul>	<ul style="list-style-type: none"> <li>• Quickly exchange ideas with people close by</li> <li>• Visually communicate to complement your words</li> <li>• Add the human element in discussing sensitive or confidential topics that need to be worked out through dialogue</li> </ul>

## Your Voice as Your Most Essential Communication Tool

We had hundreds of thousands of years to develop our voice as a communication tool until we added writing to the channel mix relatively recently about 5,000 years ago. Your voice continues to enjoy a privileged place in your communication toolbox, being the first one you use in your infancy when you cry for food and attention the moment you're born. Since then, you've developed richly expressive verbal skills that make your voice your most essential communication tool.

Your voice has qualities that cannot be communicated in written form, and you use these to your advantage when interacting with colleagues. If you're sending a general informative message to all employees, an email may serve you well, but if you're honoring an employee for receiving an industry award, your voice conveys your heartfelt congratulations much better than the written word. When trying to make a point very clearly and emphatically, slowing down your pace so that the listener focuses on each word, raising your volume to jolt the listener into paying closer attention, and dropping your pitch to sound more authoritative all have advantages over using all-caps, bold, italics, and/or underlining in an email, which altogether can look angry rather than emphatic. For sheer expressiveness and precision in communicating meaning, your voice is your go-to communication tool.

How your voice quality, volume, and pitch affect your listener's understanding of the message's the content is instrumental especially for persuasive messages. Delivering a message with a happy and enthusiastic tone will have a much different impact than serious or sad tones. In most business

situations, it is appropriate to speak with some level of formality, yet avoid sounding stilted or arrogant. Your voice volume should be normal but ensure your listeners can hear you. If your audience includes English learners, speaking louder and shouting don't help them understand you any better compared with accessible word choices delivered in a normal tone. Use simple words and short, active-voice sentences of 10-to-20 words, as well as avoid idioms (figures of speech) that don't translate literally. Pitch refers to the frequency of your voice, which you can raise or lower for effect. A pleasant, natural voice will have some variation in pitch—raised for lighthearted quips and lower for serious statements—to communicate nuances of meaning and keep the listener engaged. A speaker with the flat pitch of a robotic-sounding monotone voice tends to bore their listeners because they sound bored themselves. Modulating your volume and pitch helps communicate the emotional spin of your messages, making the spoken communication channel an incredibly rich one.

## Improving Your Conversation Skills in the Smartphone Era

If you prefer to text rather than talk to people most of the time because that's how you've (and everyone else has) been doing it throughout high school and even in college, you'll probably find yourself at a disadvantage when entering the workforce. The reason is twofold: (1) When you enter the working world, you join several generations of adults who grew up without smartphones and therefore tend to prefer talking over texting because it's a tried, tested, and true way to efficiently communicate understanding. Managers, coworkers, customers, and other stakeholders come with high expectations for the quality of conversational skill in the people they interact with, and have little patience for those who are years behind where they should be in basic oracy. (2) You could be addicted to technology, which negatively affects your ability to interact with people in person according to a growing body of research.<sup>131415</sup> Why talk to people when sending a text is just so easy and comfortable?

If anything in the above paragraphs sounds true to life, the onus rests largely on you to improve your conversation skills with all the advice that is available (ironically) on the very devices in question. For instance, we can draw on a very accessible TED Talk by Celeste Headlee, a talk-radio host and author of *We Need to Talk: How to Have Conversations That Matter*. We'll adapt her well-viewed speech for our own purposes below and build on them with a few points of our own.<sup>16</sup>



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=89#oembed-2>

1. **Be present:** Devote your undivided attention to the person you're speaking with and don't multitask. You won't have to pretend to pay attention by nodding and making eye contact if

you're doing that anyway by actually paying attention. The worst offenders are those to whip out their phone and engage with it rather than the people around them, called "phubbing" (for "phone snubbing").<sup>17</sup> Though you may feel that you can get away with phubbing in your college classes by discreetly hiding your cell phone under your desk, your instructor knows exactly what you're doing when all your attention is on your lap. The rudeness of it will likely get you slightly blacklisted—or fully blacklisted if you do it too much.

2. **Be prepared to learn:** A conversation is a dialogue, not a monologue where you simply unload your opinion on someone and receive nothing in return except for the satisfaction of dominating them with it. In certain situations, such as a TED Talk itself, you give up your right to speak because of the faith that you'll learn much more by listening to a wise speaker who needs time to get their points across.
3. **Ask open-ended questions:** The more vague your questions are (starting with the 5 Ws + H), the more freedom you give your conversation partner to answer on their own terms, whereas very specific questions limit the possible answers. If you ask "How did that make you feel?" for instance, you'll get a more expressive answer than if you limited your speaker to a yes or no answer with a question like "Did that make you happy?"
4. **Go with the flow:** Respond to your conversation partner's main points rather than with some digressive story you were reminded of by one of their minor points. When you respond in that way, it reveals that you haven't been listening past the part that inspired the barely relevant thing you feel contributes to the conversation, though it really doesn't move the conversation along so much as derail it.
5. **Admit to not knowing:** Make your confession of ignorance an opportunity to learn rather than claim to know something you don't.
6. **Honor the uniqueness of their experience:** When the speaker relates something that happened to them, resist the urge to make it about you by equating their experience with yours. If they're talking about grieving a death in the family, for instance, don't dishonor that information share by responding with how you felt when your dog died. It's not the same.
7. **Cut yourself off before repeating yourself:** If you have only one point to make, "hit it and quit it" rather than spin your wheels saying the same thing over and over, even if you change the words.
8. **Stay out of the weeds:** Rather than struggle to offer up all the details (the names, places, dates, etc.) and digress on minutiae, focus on your main points.
9. **Listen:** A conversation is a dialogue, not a monologue, and therefore requires that you actively pay attention to what the speaker says in order to understand it rather than to merely reply to it.
10. **Be brief:** People are busy and have things to do, so if your conversation detains them for longer than they have time for, you will stretch their patience. As Headlee says, "A good conversation is like a miniskirt: short enough to retain interest, but long enough to cover the subject."<sup>18</sup>

Headlee concludes that these tips are all variations on being interested in what people have to teach you. If you add the following to Headlee's advice, you stand a good chance of improving your conversation skills.

## Show Empathy

One of the key elements of being a good communicator is having empathy. That means thinking about your communication from the receiver's point of view. It's focusing on what they want to learn as a result of your communication, not what you want to tell them. Empathy is about demonstrating that you care about the other person's situation. Think about when you received your acceptance letter from college; the letter probably mentioned what an exciting time it is in your life. The author of the letter demonstrated empathy because they focused on the situation from your perspective. A purely factual letter, without empathy, might have said that you were accepted and that now the school can make their budget since they met their enrollment goal. That would be quite a different letter and would make you feel very different (and probably not very welcome).

Empathy fits with emotional intelligence (discussed earlier in this chapter) as a sales skills because it's the ability to know what another person is thinking or feeling. "Without empathy in sales, a salesperson can't influence others, and prospects don't buy from salespeople who don't understand them".<sup>19</sup> Empathy is an integral part of emotional connection, one of the elements of a brand (Keep in mind that when you are in a customer-facing role, you are the brand to the customer.) It is especially important to have an emotional connection and empathy when apologizing to customers. Chances are the customer is already angry, or at least disappointed, when you are not able to deliver as expected. You can express empathy in your communications by saying or writing, "You have every right to be upset. I understand how you must feel. I apologize for the late delivery. Let's work on a new process that will help prevent it from happening again."<sup>20</sup>

## Be Specific

If you go to dinner at the Cheesecake Factory and there is a wait to get a table, the host will hand you a portable pager or take your cell phone number and tell you that the wait will be twenty to twenty-five minutes. Perfect. You have just enough time to run a quick errand at a nearby store at the mall and be back in time to get your table. If, on the other hand, they told you that you will be seated shortly, you might have an expectation of being seated in five to ten minutes. Meanwhile, "shortly" might mean twenty to twenty-five minutes for them. You would probably forgo running your errand because you think you are going to be seated soon but end up waiting for twenty-five minutes and being frustrated. Being specific in your communication not only gives clarity to your message but also helps set your customer's expectations. In other words, your customer won't expect something you can't deliver if you are clear about what exactly you can deliver and when. Specificity avoids surprises and sets expectations. Examples of general statements that can be communicated more effectively when made into specific statements can be found in the table below.

## General vs. Specific Statements

### General Statement

I'll get back to you shortly.

It will only take a few minutes.

It will cost about \$5000 plus installation.

Everything is included.

### Specific Statement

I'll get back to you by Tuesday.

It will take less than 5 minutes.

The cost is \$4,800 plus \$200 for installation.

It includes your choices of entree, vegetable, dessert, and coffee.

## Mirror the Speaker

You may have occasionally caught yourself automatically imitating your conversation partner's posture, facial expression, and manner of speaking. When they look relaxed or lean in, talk slow because they're calm or talk fast because they're in a rush, or widen their eyes with excitement, you follow suit in every case. Coined the "chameleon effect" by psychologists, mirroring is unconscious physical behavior motivated by our desire to fit in so our conversation partner identifies with and likes us.<sup>21</sup> It supports the cliché that imitation is the highest form of flattery, and happens not only for romantic partners but also for good friends and even workplace colleagues.

Though it happens unconsciously, mirroring deliberately has been found to be especially effective as a sales technique and in job interviews, though only if the person being imitated doesn't notice the imitator doing it. If you can be subtle and natural about it, intentional mirroring forces you to read your conversation partner's verbal and nonverbal messages closely. Done effectively, mirroring benefits both speakers by building the trust and rapport necessary to collaborate effectively or close a deal<sup>22</sup>.

## Correctly Pronounce Words and Names

Though it's difficult for learners of English to get the hang of it, take care to carefully pronounce your words. State them the way native English speaker tend to speak them, especially those whose job is to speak, such as radio hosts and actors. An excellent strategy is to watch movies with subtitles to associate the written words with those heard, and then to imitate the pronunciation. When you get more familiar with the language, you can move up to listening to the radio, such as the CBC, and continue to work on the accent at a normal conversational pace without subtitles.

Even native English speakers should be careful with pronunciation, especially with words they rarely hear, if ever. Mispronunciation can negatively impact your reputation or perceived credibility. Instead of using complicated words that may trip you up, choose a simple phrase if you can, or learn to pronounce the word correctly before using it in a formal interactive setting (University of Minnesota Libraries, 2015, 19.4).<sup>23</sup> If you think you'll stumble over a word like archipelago, for instance, just use a synonymous phrase such as "island chain."

The importance of pronunciation is nowhere more important than with people's names. Some take offense to their name being mispronounced, and especially with their name being confused with a different but similar name. If someone's name looks unpronounceable on paper, simply asking them how they prefer their name to be pronounced is better than confidently mispronouncing it.

Be careful also with where stresses go when pronouncing words. Every word with more than one syllable has stressed and unstressed syllables. We pronounce the word *syllable*, for instance, by stressing the first syllable (*SIH*)—i.e., raising our volume slightly and spending a little longer enunciating it compared with the two following unstressed syllables (*lah-bul*), which we enunciate quicker and quieter. Stressing the middle syllable (*sih-LAH-bul*) would sound strange.

Be especially careful pronouncing words you've only seen in writing. If you've only ever read the fancy word *superfluous*, for instance, but never heard anyone say it aloud, you'd sound slightly silly pronouncing it in conversation by stressing the first syllable (*SOO-per-FLOO-us*) as you normally would when pronouncing the word *super*. Many online dictionaries such as Dictionary.com feature an audio button you can click on to hear the word pronounced correctly. In the case of *superfluous*, you can hear it pronounced properly with the stress on *per* with the other three syllables unstressed (*soo-PER-floo-us*).

## Treat Conversations Like Volley Sports

A conversation isn't a monologue where you fire words at a wall until you have nothing left to say. It's more like a game of volleyball, tennis, or ping-pong where possession of the speech right is exchanged back and forth. If it's a friendly game, the objective is to volley words for as long as it's fun or productive. This may mean asking a good question, which lobs the speech over the net to your conversation partner. They answer and can either ask you a feedback question in return or you can respond to their answer with a statement. Every time you speak, you must set up your conversation partner to be able to respond with either a statement or question, and expect them to do the same. Conversations would be frustrating if all the other person did was either spike the ball repeatedly to score points against you so that you could never touch it (i.e., delivered a monologue where you couldn't get a word in edgewise), or just bounced the ball out of bounds every time you volleyed it straight to them—i.e., answered in a way that stalled the conversation, such as with one-word answers to your questions or bizarre statements you don't know how to respond to. A conversation must be a dynamic process where both sides make a determined, concerted effort to keep it going until the objective has been reached or the clock runs down.

## Telephone and Voicemail

The simplest form of audio-only conversation—i.e., talk stripped of all nonverbals—is a telephone call. A phone call is advantageous whenever you need the live volley of conversation with someone to sort out details in a timely manner, but are too distant from them physically to do it in person. Some

make the mistake of choosing written channels like email or text, drawing out the communication process over hours or days, to discuss matters that would take mere seconds or minutes by phone. As long as you don't need details permanently recorded in writing, phone is an expedient channel to discuss details for any busy professional.

Though you've probably talked on the phone countless times throughout your life, you may not yet have had the chance to do so professionally where the expectations for competence are much higher than in social or family contexts—so much so that some executives hire professional voice coaches to help them increase their effectiveness in phone communication. The importance of audio communication in business and industry has increased with the availability of conference calls, voice over internet protocol (VoIP), voice-activated electronic menus, and voice-to-text dictation software such as that in the Gboard (Google keyboard) app for smartphones. We'll examine below how to improve your phone game in an age where many prefer to text rather than call. First, however, let's review what the telephone and its modern adaptations are all about according to the table below.

## Channel: Telephone and Its Adaptations

Channel	Advantages	Disadvantages	Expectations	Appropriate Use
Phone, VoIP, voicemail, and conference calls	<ul style="list-style-type: none"> <li>• Enables audio-only dialogue between speakers anywhere in the world</li> <li>• Quick back-and-forth saves time compared to written dialogue by email or text</li> <li>• Can send one-way voicemail messages or leave them when the recipient isn't available</li> <li>• Can be conducted cheaply over the internet (with Voice over Internet Protocol [VoIP]) and easily on smartphones</li> <li>• Specialized phone equipment and VoIP enable conference calls among multiple users</li> </ul>	<ul style="list-style-type: none"> <li>• Absence of nonverbal visual cues can make dialogue occasionally difficult</li> <li>• The receiver of a call isn't always available, so the timing must be right on both ends; if not, availability problems lead to "phone tag"</li> <li>• Time zone differences complicate the timing of long-distance calls</li> <li>• Possibly expensive for long-distance calls over a public switched telephone network (PSTN) if VoIP isn't available</li> <li>• Not always clear how long you have to leave a voicemail message, running the risk of being cut off if your message runs too long</li> <li>• Recording of conversations is typically unavailable unless you have special equipment</li> </ul>	<ul style="list-style-type: none"> <li>• Follow conventions for initiating and ending audio-only conversation</li> <li>• For voicemail, strike a balance between brevity and providing a thorough description of the reason for the call and your contact information</li> <li>• Record a professional call-back message for voicemail when not available to take a call</li> <li>• Respond to voicemail as soon as possible since you were called with the hope that you would be available to talk immediately</li> <li>• Be careful with confidential information over the phone, and don't discuss confidential information via voicemail</li> </ul>	<ul style="list-style-type: none"> <li>• For when quick dialogue is necessary between speakers physically distant from one another</li> <li>• Conference call when members of a team can't be physically present for a meeting</li> <li>• Use VoIP to avoid long-distance charges</li> <li>• Leave clear voicemail messages when receivers aren't available</li> <li>• When a record of the conversation isn't necessary</li> <li>• When confidentiality is somewhat important</li> </ul>

## Your Voice on the Phone

When you lack the nonverbal context of your conversation partner being able to see how you say what you say, take pains to ensure that your voice accurately communicates your message. Without nonverbals, your choice of words and how you say them, including spacing or pausing, pace, rhythm, articulation, and pronunciation are more relevant than when you talk in person. Consider these five points:

1. **Speak slowly** and **articulate your words clearly**. You don't have to slow down your normal pattern of speech much, but each word needs time and space to be understood or else the listener may hear words running together, losing meaning and creating opportunities for misunderstanding. For instance, numbers such as "18" may sound like "80" and vice versa if you're speaking too quickly and have an accent, which could lead to disaster if you're, say, discussing price in a six-figure real estate deal.
2. Use **vivid terms** to create interest and communicate descriptions. When using the phone to deliver bad news, talking on the phone or producing an audio recording lacks an interpersonal context with the accompanying nonverbal messages. Unless you use vivid language and crisp, clear descriptions, your audience will be left to sort it out for themselves. They may create mental images that don't reflect your intended meanings and lead to miscommunication.
3. Be **specific**. Don't assume that they will catch your specific information the first time. **Repeat as necessary**, especially addresses and phone numbers.
4. Show consideration for others by keeping your phone conversations **private**. Avoid calls in a crowded elevator, for instance.
5. **Silence cell phones** and other devices when in a meeting or eating with colleagues. Recall Simon Sinek's explanation for why this is important.<sup>24</sup>

As the response from the receiver to the sender, feedback is also an essential element of phone conversations. Taking turns in the conversation can sometimes be awkward when you can't see when your conversation partner is about to speak. With time and practice, each "speaker's own natural, comfortable, expressive repertoire will surface."<sup>25</sup>

## Leaving and Receiving Voicemail

When you phone someone but are sent to voicemail because they don't pick up, switching to monologue mode means that you can only get as far as the preview stage of the conversation structure outlined above. You'd still open by saying hello, your full name, and company. The limit on how much recording time you have (30 seconds? 60?—you may not know) and absence of feedback from the listener, however, means that you can really only say what the call is about in concise, clear terms. A long, rambling voice mail message may be cut off and you may not even know it, as well as increases the possibility for misunderstandings without being present to clarify based on your listener's responses. Anything that needs discussion must be saved for the actual conversation, especially anything of a sensitive nature. Recording confidential information is potentially dangerous to you and others.

Add your contact information, even if you think the person already knows your phone number, and say it twice slowly so that the listener has additional time to get a pen and paper if they're still looking for them the first time you say it. Imagining you were writing down your phone number as you recite it will help you deliver it at a listener-friendly speed (University of Minnesota Libraries, 2015, 15.2).<sup>26</sup> Precise pronunciation is crucial because "60" and "16" or "90" and "19" may sound the same in a strong accent.

Be prepared to receive voicemail by recording a professional-sounding call-back message that begins after about 4-5 rings. Top professionals record a new one every morning when they begin work and include the date in it. They can thus state what their availability is throughout the day and assure the listener how quickly to expect a call back. When you receive a voicemail, return the call as soon as possible. The 24-hour rule of email doesn't apply with voicemail because the person who called you chose this channel deliberately expecting to discuss something with you "live" in a timely manner. With so many channels available, using the phone implies a sense of urgency.

#### Key Takeaway



Success in the workplace depends on your ability to effectively engage coworkers, clients, managers, and other stakeholders in face-to-face conversation and on the phone.

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# Chapter 5: Nonverbal Communication

## *Learning Objectives*

After reviewing this information, you will be able to

1. Define nonverbal communication
2. Discuss the eight types of nonverbal communication.

## **Introduction: What is Nonverbal Communication?**

How do you know when your friends, family, bosses, or instructors are pleased with your progress (or not)? You might know from the smiles on their faces; from the time and attention they give you; or perhaps in other nonverbal ways, like a raise, a bonus, or a good grade. Whether the interaction takes place face-to-face or at a distance you can still experience and interpret nonverbal responses.

Watch “Body Language” YouTube video. Closed-captioning is available on YouTube.



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Chances are you have had many experiences where words were misunderstood or where the meaning of words was unclear. When it comes to nonverbal communication, meaning is even harder to discern. We can sometimes tell what people are communicating through their nonverbal communication, but there is no foolproof “dictionary” of how to interpret nonverbal messages. **Nonverbal communication** is the process of conveying a message without the use of words. It can include gestures and facial expressions, tone of voice, timing, posture, and where you stand as you communicate. It can help or hinder the clear understanding of your message, but it doesn't reveal (and can even mask) what you are really thinking. Nonverbal communication is far from simple, and its complexity makes our study and our understanding a worthy but challenging goal.



Image by JonathanAlvarezF from Pixabay

Dr. Albert Mehrabian, a famed psychologist and professor emeritus of psychology at University of California, Los Angeles, is considered a pioneer in the area of body language and nonverbal communication. His research includes an equation, called the Mehrabian formula that is frequently used to define the relative impact of verbal and nonverbal messages based on experiments of communication of feelings and attitudes:<sup>1</sup>

- 7% of meaning in the words that are spoken.
- 38% of meaning is paralinguistic (the way that the words are said).
- 55% of meaning is in facial expression.

The formula reflects how we interpret meaning during communication. In the formula, you can see that only 7% of the meaning in a conversation is from the actual words spoken where as 38% is in the way we speak the words and a whopping 55% is in our facial expressions. Miscommunication occurs when facial expressions contradict words, and then people tend to believe the facial expressions.<sup>2</sup> In sales, it would be important to recognize this to ensure that your words match your intonation and your facial expressions.

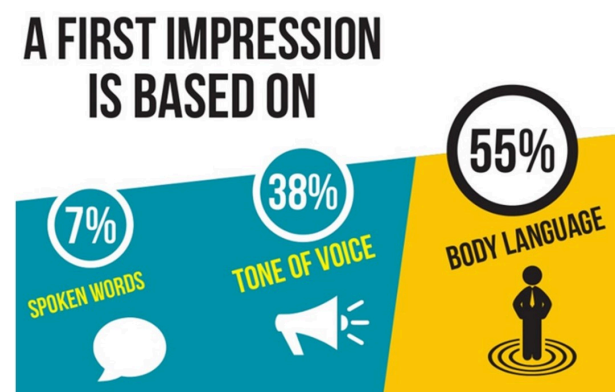


Figure 4: The 55/38/7 Formula developed by Albert Mehrabian image copyright Digi Web Art.

Nonverbal communication involves the entire body, the space it occupies and dominates, the time it interacts, and not only what is not said, but how it is not said. Try to focus on just one element of nonverbal communication and it will soon get lost among all the other stimuli. Let's consider eye contact. What does it mean by itself without context, chin position, or eyebrows to flag interest or signal a threat? Nonverbal action flows almost seamlessly from one to the next, making it a challenge to interpret one element or even a series of elements.

Nonverbal communication is irreversible. In written communication, you can write a clarification, correction, or retraction. While it never makes the original statement go completely away, it does allow for correction. Unlike written communication, oral communication may allow “do-overs” on the spot: you can explain and restate, hoping to clarify your point. Oral communication, like written communication, allows for some correction, but it still doesn’t erase the original message or its impact. Nonverbal communication takes it one step further. You can’t separate one nonverbal action from the context of all the other acts of verbal and nonverbal communication, and *you can’t take it back*. You need to be conscious of this aspect of your nonverbal behavior, in the case of nonverbal communication actions really do speak louder than words. This is true in the sense that people often pay more attention to your nonverbal expressions more than your words. As a result, nonverbal communication is a powerful way to contribute to (or detract from) your success in communicating your message to others.

Watch “‘Eye’ Understand: The Power of Non-Verbal Communication” YouTube video to learn insights into nonverbal communication.<sup>3</sup> Closed-captioning is available on YouTube.



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## What to Know About Nonverbal Communication

It’s not always what you say, but how you say it that makes a difference. Nonverbal communication and body language can include gestures and facial expressions, tone of voice, timing, posture and where you stand as you communicate. It can help or hinder the clear understanding of your message, but it doesn’t reveal (and can even mask) what you are really thinking. Nonverbal communication is far from simple, and learning how to understand nonverbal skills will increase your effectiveness as a business communicator.

### Nonverbal Communication Is Fast

Let’s pretend you are at your computer at work. You see that an e-mail has arrived, but you are right in the middle of a complex task. The e-mail is from a coworker and you click on it. The subject line reads “let go.” You could interpret this to mean a suggestion there is a joke about Disney’s Frozen in the email or a challenge to release some stress but letting go, but in the context of the workplace you may assume it means getting fired. Your emotional response is immediate. If the author of the e-mail could see your face, they would know that your response was one of disbelief and frustration, even anger, all via your nonverbal communication.

Your nonverbal communication happens like this all the time without much conscious thought

at all. You may think about how to share the news with your partner and try to display a smile and a sense of calm when you feel like anything but smiling. Nonverbal communication gives our thoughts and feelings away before we are even aware of what we are thinking or how we feel. People may see and hear more than you ever anticipated. Your nonverbal communication includes both intentional and unintentional messages, but since it all happens so fast, the unintentional ones can contradict what you know you are supposed to say or how you are supposed to react.

For example, suppose you are working as a salesclerk in a retail store, and a customer just communicated their frustration to you, about something you don't think is a big deal. Would the nonverbal aspects of your response be intentional or unintentional? Your job is to be pleasant and courteous at all times, yet your wrinkled eyebrows or wide eyes may have been unintentional. Your nonverbals clearly communicate your negative feelings at that moment. Restating your wish to be helpful and displaying nonverbal gestures may communicate "no big deal," but the stress of the moment is still "written" on your face.

Can we tell when people are intentionally or unintentionally communicating nonverbally? Ask ten people this question and compare their responses. You may be surprised. It is clearly a challenge to understand nonverbal communication in action. We often assign intentional motives to nonverbal communication when in fact their display is unintentional and often hard to interpret.

As you can see, nonverbal communication can be confusing. We need contextual clues to help us understand, or begin to understand, what a movement, gesture, or lack of display means. Then we have to figure it all out based on our prior knowledge (or lack thereof) of the person and hope to get it right. Talk about a challenge. Nonverbal communication is everywhere, and we all use it, but that doesn't make it simple or independent of when, where, why, or how we communicate.

## Nonverbal Messages Communicate Feelings and Attitudes

There are three additional principles of interpersonal nonverbal communication that serve our discussion.<sup>4</sup>

1. You often react faster than you think.
2. Your nonverbal responses communicate your initial reaction before you can process it through language or formulate an appropriate response.
3. If your appropriate, spoken response doesn't match your nonverbal reaction, you may give away your true feelings and attitudes.

Albert Mehrabian asserts that we rarely communicate emotional messages through the spoken word. According to Mehrabian, 93 percent of the time we communicate our emotions nonverbally, with at least 55 percent associated with facial gestures. Vocal cues, body position and movement, and normative space between speaker and receiver can also be clues to feelings and attitudes.<sup>5</sup>

Is your first emotional response always an accurate and true representation of your feelings and

attitudes, or does your emotional response change across time? We are all changing all the time, and sometimes a moment of frustration or a flash of anger can signal to the receiver a feeling or emotion that existed for a moment but has since passed. Their response to your communication will be based on that perception, even though you might already be over the issue. According to William Seiler and Melissa Beall, most people tend to believe the nonverbal message over the verbal message. People will often answer that “actions speak louder than words” and place a disproportionate emphasis on the nonverbal response.<sup>6</sup> This is why it is important for us to be aware of our own nonverbal communication and ensure we are communicating what we mean. Some common ways we communicate deception through nonverbal communication that we may or may not recognize include:<sup>7</sup>

- Reduction in eye contact while engaged in a conversation
- Awkward pauses in conversation
- Higher pitch in voice
- Deliberate pronunciation and articulation of words
- Increased delay in response time to a question
- Increased body movements like changes in posture
- Decreased smiling
- Decreased rate of speech

This is where the spoken word serves us well. You may need to articulate clearly that you were frustrated, but not anymore. The words spoken out loud can serve to clarify and invite additional discussion.

For more information on non-verbal communication, watch the Ted Talk, “Reading Minds Through Body Language”<sup>8</sup>, and read this article.<sup>9</sup>



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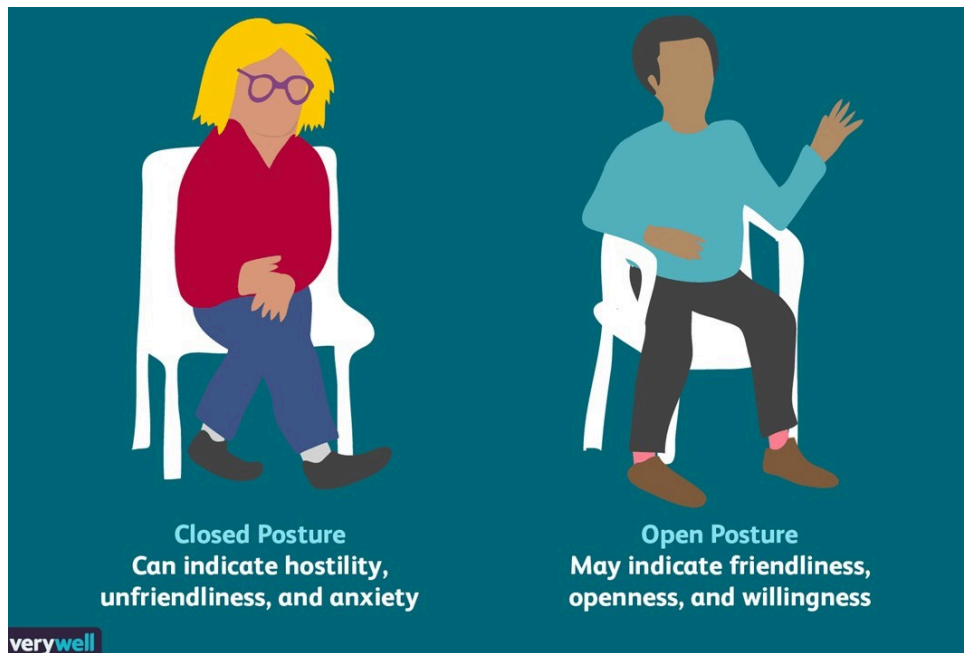
## Types of Nonverbal Communication

How do you know when your boss or instructors are pleased with your progress (or not)? You might know from the smiles on their faces, from the time and attention they give you, or perhaps in other nonverbal ways, like a raise, a bonus, or a good grade. Whether the interaction takes place face-

to-face, or at a distance, you can still experience and interpret nonverbal responses. Eight types of nonverbal communication are discussed below.

## 1. Body language

Body language is the way people situate their body naturally depending on the situation, the environment and how they are feeling. Different forms of body language include gestures, eye contact, posture and facial expressions. For example, think of all the times your parents have told you to stand up straight. The way you sit or stand communicates your comfort level, professionalism and general disposition towards a person or conversation. The image below explains the nonverbal cues communicated by each posture displayed.



*Figure 5: Nonverbal messages of posture. A closed posture can indicate unfriendliness, while an open posture may indicate willingness. Adapted from Understanding Body Language and Facial Expressions, by Kendra Cherry, 2022. Copyright 2017 by Verywell Mind.*

Numerous gestures are possible, and each gesture conveys something different. The range of possibilities is one of the reasons nonverbal communication is so complex. Review the table below for a number of common gestures and their meaning.

Gesture	Meaning
Emblems	Gestures that can easily be translated to word. For example, waving to say hello or good-bye.
Illustrators	Gestures that support the spoken word. For example, wagging your finger while saying no.
Affect Display	Gestures that display emotion; for example, a smile.
Regulators	Gestures that control interaction. For example, leaning forward to signal interest.
Adaptors	Gestures that indicate tension. For example, tapping your feet before the beginning of a test.

## 2. Space or Proxemics

The amount of space that exists between yourself and others communicates your comfort level, the importance of the conversation, your desire to support or connect with others, and the relative degree of power you hold. Space can be categorized into intimate, personal, social, and public. Review the image below for an overview of these categories.

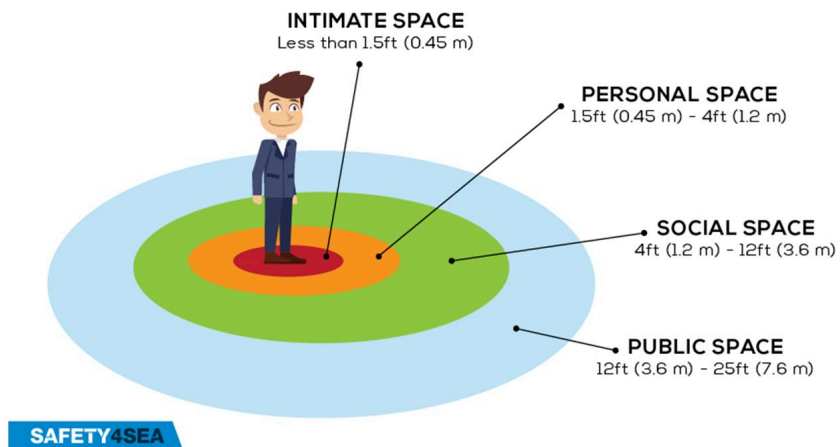


Figure 6: Edward T. Hall's zones of interpersonal distance: intimate space less than 1.5 feet; personal space 1.5 to 4 feet; social space 4 feet to 12 feet; and public space 12 feet to 25 feet. The zones of interpersonal distance defined by Edward T. Hall. Image copyright 2020 by Safety4Sea.

## 3. Paralanguage

Paralanguage includes the non-language elements of speech, such as your talking speed, pitch, intonation, volume and more. The saying “the meaning is in the person not in the words” applies

here. Becoming an effective speaker involves understanding how to maximize and manage the specific qualities of your voice to clearly articulate your words and ideas.

## 4. Time or Chronemics

For business professionals, time is a valuable resource. Over the years, time has become a commodity. The saying “time is money” is very true for many professions, businesses, and cultures. How long it takes to complete an action, how punctual a person is, how long someone will listen or wait for a reply communicates their relative importance.

## 5. Physical Characteristics

You didn’t choose your genes, your eye color, the natural color of your hair, or your height, but people spend millions every year trying to change their physical characteristics. You can get colored contacts; dye your hair; and if you are shorter than you’d like to be, buy shoes to raise your stature a couple of inches. Although some may find it superficial, the way we look affects the way we feel and how others perceive us. Research shows that we tend to think more positively of people deemed attractive. The work environment is no different. Take care that you are communicating the message you desire by cultivating your professional attire and look.

## 6. Touch

Touch is the most powerful form of nonverbal communication. Research shows that intimate contact is critical to the understanding of our own humanity. Over the last few years, the understanding of what is considered appropriate touching in the work environment is changing. Thus, although touch is of paramount importance, if inappropriate, it also carries the potential for the most problems.

## 7. Artifacts

Do you cover your tattoos when you are at work? Do you know someone who does? Expectations vary a great deal, and body art or tattoos may still be controversial in the workplace. Artifacts are forms of decorative ornamentation that are chosen to represent self-concept. They can include rings and tattoos, but may also include clothes, cars, watches, briefcases, purses, and even eyeglasses. Artifacts may project gender, role or position, class or status, personality, and group membership or affiliation. Paying attention to a customer’s artifacts may allow you to more accurately adapt your message to meet their needs.

## 8. Environment

Environment involves the physical and psychological aspects of the communication context. More than the tables and chairs in an office, the environment is an important part of the dynamic communication process. The perception of one's environment influences one's reaction to it. For example, Google is famous for its work environment, with spaces created for physical activity and even in-house food service around the clock. The expense is no doubt considerable, but Google's actions speak volumes. In Google's view, the results produced in the environment, designed to facilitate creativity, interaction, and collaboration, are worth the effort.



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## Developing Your Nonverbal Communication Skills

Nonverbal communication is an important aspect of business communication, from the context of interpersonal interaction to a public presentation. It is a dynamic, complex, and challenging aspect of communication. You are never done learning and adapting to your environment and context, and improving your understanding of nonverbal communication comes with the territory.

In order to be a successful business communicator, you will need to continually learn about nonverbal communication and its impact on your interactions. Below are three ways to develop your nonverbal communication skills.

### Watch Reactions

Market research is fundamental to success in business and industry. So, too, you will need to do a bit of field research to observe how, when, and why people communicate the way they do. If you want to be able to communicate effectively with customers, you will need to anticipate not only their needs, but also how they communicate. They are far more likely to communicate with someone whom they perceive as being like them, than with a perceived stranger. From dress to mannerisms and speech patterns, you can learn from your audience how to be a more effective business communicator.

## Enroll an Observer

Most communication in business and industry involves groups and teams, even if the interpersonal context is a common element. Enroll a coworker or colleague in your effort to learn more about your audience, or even yourself. They can observe you and note areas you may not have noticed that could benefit from revision. Perhaps the gestures you make while speaking tend to distract rather than enhance your communication. You can also record a video of yourself speaking with someone and play it to get a sense of how your nonverbal communication complements or detracts from the message.

## Focus on a Specific Type of Nonverbal Communication

What is the norm for eye contact where you work? Does this change or differ based on gender, age, ethnicity, cultural background, context, environment? Observation will help you learn more about how people communicate; looking for trends across a specific type of nonverbal communication can be an effective strategy. Focus on one behavior you exhibit, like pacing, hand gestures, or eye contact. Use nonverbal communication to enhance your message, watch reactions and consider enrolling an observer to help you become aware of your nonverbal habits and how your others receive nonverbal messages.



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## Active Listening

You may have experienced the odd sensation of driving somewhere and, having arrived, have realized you don't remember driving. Your mind may have been filled with other issues, and you drove on autopilot. It's dangerous when you drive on auto-pilot; similarly communicating on autopilot is also dangerous. Choosing to listen attentively takes effort. People communicate with words, expressions, and even in silence, and your attention to them will make you a better communicator. From discussions on improving customer service to retaining customers in challenging economic times, the importance of **active listening** comes up frequently as a success strategy.

According to research, adults spend about 70% of their time communicating with others. While you might assume most of that communication is speaking, it's actually listening.<sup>10</sup> See Figure 6 for a breakdown of time typically spent on each communication skill in an average workday.

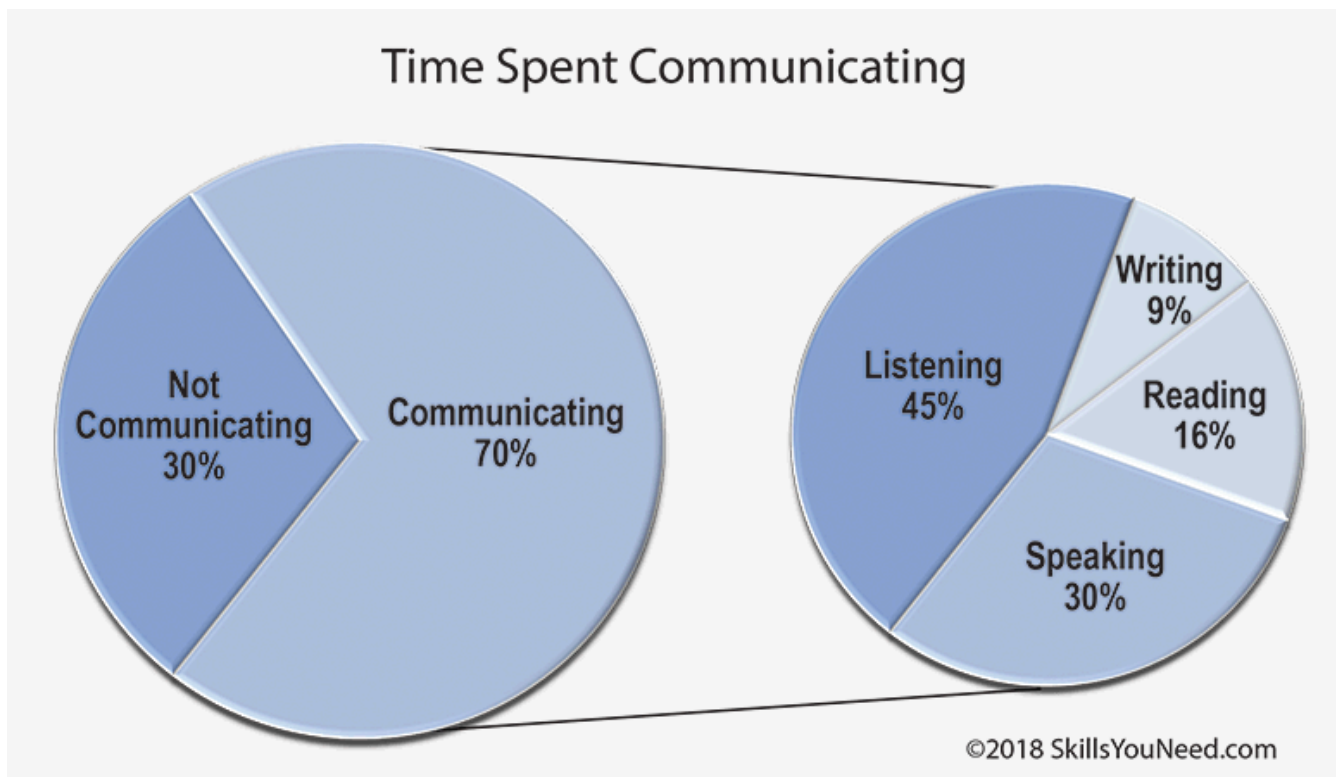


Figure 7: Time spent communicating: Listening 45%, Speaking 30%, Reading 16%, Writing 9%. By Adler, et al. (2001). Image copyright 2018 SkillsYouNeed.com.

There are five steps in the listening process: **selecting, attending, understanding, remembering, and responding.**<sup>11</sup>

*Here are some tips to facilitate active listening:*

- Maintain eye contact with the speaker
- Don't interrupt
- Focus your attention on the message, not your internal monologue.
- Restate the message in your own words and ask if you understood correctly.
- Ask clarifying questions to communicate interest and gain insight.



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Our previous tips will serve you well in daily interactions, but suppose you have an especially difficult

subject to discuss. In difficult situations, make an extra effort to create an environment that will facilitate positive communication.

Here are some tips that may be helpful:

- **Set aside a special time.** To have a difficult conversation, set aside time when you will not be disturbed.
- **Don't interrupt.** Keep silent while you let the other person speak.
- **Be nonjudgmental.** Receive the message without judgment or criticism. Set aside your opinions, attitudes, and beliefs.
- **Be accepting.** Be open to the message being communicated, realizing that acceptance does not necessarily mean you agree with what is being said.
- **Take turns.** Wait until it is your turn to respond, and then measure your response in proportion to the message that was delivered to you. Reciprocal turn-taking allows each person have his say.
- **Acknowledge.** Let the other person know that you have listened to the message attentively.
- **Understand.** Be certain that you understand what the other person is saying. If you don't understand, ask for clarification. Restate the message in your own words.
- **Keep your cool.** Speak your truth without blame. A calm tone will help prevent the conflict from escalating. Use "I" statements (e.g., "I felt concerned when I learned that my department is going to have a layoff") rather than "you" statements (e.g., "you want to get rid of some of our best people").



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## Conclusion

Recognize that mutual respect and understanding are built one conversation at a time. Trust is difficult to gain and easy to lose. Be patient and keep the channels of communication open, as a solution may develop slowly over the course of many small interactions. Recognize that it is more valuable to maintain the relationship over the long term than to "win" in an individual transaction.



1. Choose a television personality you admire. What do you like about this person? Watch several minutes of this person with the sound turned off, and make notes of the nonverbal expressions you observe. Turn the sound back on and make notes of their tone of voice, timing, and other audible expressions.
2. Create a survey that addresses the issue of which people trust more, nonverbal or verbal messages. Ask an equal number of men and women and compare your results with those of your classmates.

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## References

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## Notes

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# Chapter 6: Listening Skills

## *Learning Objectives*

After reviewing this information, you will be able to

1. Explain the 5 stages of the listening process and ways to improve listening at each stage.
2. Discuss how active listening can address barriers to effective listening.

## The Listening Process

We begin to engage with the listening process long before we engage in any recognizable verbal or nonverbal communication. It is only after listening for months as infants that we begin to consciously practice our own forms of expression. In this section we will learn more about each stage of the listening process, the main types of listening, and the main listening styles.

Listening is a process and as such doesn't have a defined start and finish. Like the communication process, listening has cognitive, behavioral, and relational elements and doesn't unfold in a linear, step-by-step fashion. Models of processes are informative in that they help us visualize specific components, but keep in mind that they do not capture the speed, overlapping nature, or overall complexity of the actual process in action. The stages of the listening process are receiving, interpreting, recalling, evaluating, and responding.

## Receiving

Before we can engage other steps in the listening process, we must take in stimuli through our senses. In any given communication encounter, it is likely that we will return to the receiving stage many times as we process incoming feedback and new messages. This part of the listening process is more physiological than other parts, which include cognitive and relational elements. We primarily take in information needed for listening through auditory and visual channels. Although we don't often think about visual cues as a part of listening, they influence how we interpret messages. For example, seeing a person's face when we hear their voice allows us to take in nonverbal cues from facial expressions and eye contact. The fact that these visual cues are missing in e-mail, text, and

phone interactions presents some difficulties for reading contextual clues into meaning received through only auditory channels.

It is important to consider noise as a factor that influences how we receive messages. Some noise interferes primarily with hearing, which is the physical process of receiving stimuli through internal and external components of the ears and eyes, and some interferes with listening, which is the cognitive process of processing the stimuli taken in during hearing. While hearing leads to listening, they are not the same thing. Environmental noise such as other people talking, the sounds of traffic, and music interfere with the physiological aspects of hearing. Psychological noise like stress and anger interfere primarily with the cognitive processes of listening. We can enhance our ability to receive, and in turn listen, by trying to minimize noise.

Watch the “5 Ways to Listen Better” YouTube video below to learn more.<sup>1</sup> Closed-captioning is available on YouTube.



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## Interpreting

During the interpreting stage of listening, we combine the visual and auditory information we receive and try to make meaning out of that information. The interpreting stage engages cognitive and relational processing as we take in informational, contextual, and relational cues and try to connect them in meaningful ways to previous experiences. It is through the interpreting stage that we may begin to understand the stimuli we have received. When we understand something, we are able to attach meaning by connecting information to previous experiences. If we have difficulty interpreting information, meaning we don't have previous experiences or information to make sense of it, then it is difficult to transfer the information into our long-term memory for later recall. In situations where understanding the information we receive isn't important or isn't a goal, this stage may be fairly short or even skipped. After all, we can move something to our long-term memory by repetition and then later recall it without ever having understood it. I remember earning perfect scores on exams in my anatomy class in college because I was able to memorize and recall, for example, all the organs in the digestive system. In fact, I might still be able to do that now over a decade later. But neither then nor now could I tell you the significance or function of most of those organs, meaning I didn't really get to a level of understanding but simply stored the information for later recall.

## Recalling

Our ability to recall information is dependent on some of the physiological limits of how memory works. Overall, our memories are known to be fallible. We forget about half of what we hear immediately after hearing it, recall 35 percent after eight hours, and recall 20 percent after a day.<sup>2</sup> Our memory consists of multiple “storage units,” including sensory storage, short-term memory, working memory, and long-term memory.<sup>3</sup>

Our sensory storage is very large in terms of capacity but limited in terms of length of storage. We can hold large amounts of unsorted visual information but only for about a tenth of a second. By comparison, we can hold large amounts of unsorted auditory information for longer—up to four seconds. This initial memory storage unit doesn’t provide much use for our study of communication, as these large but quickly expiring chunks of sensory data are primarily used in reactionary and instinctual ways.

As stimuli are organized and interpreted, they make their way to short-term memory where they either expire and are forgotten or are transferred to long-term memory. Short-term memory is a mental storage capability that can retain stimuli for twenty seconds to one minute. Long-term memory is a mental storage capability to which stimuli in short-term memory can be transferred if they are connected to existing information. Once there, they can be stored indefinitely.<sup>4</sup> Working memory is a temporarily accessed memory storage space that is activated during times of high cognitive demand. When using working memory, we can temporarily store information and process and use it at the same time. This is different from our typical memory function in that information usually has to make it to long-term memory before we can call it back up to apply to a current situation. People with good working memories are able to keep recent information in mind and process it and apply it to other incoming information. This can be very useful during high-stress situations. A person in control of a command center like the White House Situation Room should have a good working memory in order to take in, organize, evaluate, and then immediately use new information instead of having to wait for that information to make it to long-term memory and then be retrieved and used.

Although recall is an important part of the listening process, there isn’t a direct correlation between being good at recalling information and being a good listener. Some people have excellent memories and recall abilities and can tell you a very accurate story from many years earlier during a situation in which they should actually be listening and not showing off their recall abilities. Recall is an important part of the listening process because it is most often used to assess listening abilities and effectiveness. Many quizzes and tests in school are based on recall and are often used to assess how well students comprehended information presented in class, which is seen as an indication of how well they listened. When recall is our only goal, we excel at it. Experiments have found that people can memorize and later recall a set of faces and names with near 100 percent recall when sitting in a quiet lab and asked to do so. But throw in external noise, more visual stimuli, and multiple contextual influences, and we can’t remember the name of the person we were just introduced to one minute earlier. Even in interpersonal encounters, we rely on recall to test whether or not someone was listening. Imagine that Azam is talking to his friend Belle, who is sitting across from

him in a restaurant booth. Azam, annoyed that Belle keeps checking her phone, stops and asks, “Are you listening?” Belle inevitably replies, “Yes,” since we rarely fess up to our poor listening habits, and Azam replies, “Well, what did I just say?”

## Evaluating

When we evaluate something, we make judgments about its credibility, completeness, and worth. In terms of credibility, we try to determine the degree to which we believe a speaker’s statements are correct and/or true. In terms of completeness, we try to “read between the lines” and evaluate the message in relation to what we know about the topic or situation being discussed. We evaluate the worth of a message by making a value judgment about whether we think the message or idea is good/bad, right/wrong, or desirable/undesirable. All these aspects of evaluating require critical thinking skills, which we aren’t born with but must develop over time through our own personal and intellectual development.

Studying communication is a great way to build your critical thinking skills, because you learn much more about the taken-for-granted aspects of how communication works, which gives you tools to analyze and critique messages, senders, and contexts. Critical thinking and listening skills also help you take a more proactive role in the communication process rather than being a passive receiver of messages that may not be credible, complete, or worthwhile. One danger within the evaluation stage of listening is to focus your evaluative lenses more on the speaker than the message. This can quickly become a barrier to effective listening if we begin to prejudge a speaker based on his or her identity or characteristics rather than on the content of his or her message.

## Responding

Responding entails sending verbal and nonverbal messages that indicate attentiveness and understanding or a lack thereof. From our earlier discussion of the communication model, you may be able to connect this part of the listening process to feedback. Later, we will learn more specifics about how to encode and decode the verbal and nonverbal cues sent during the responding stage, but we all know from experience some signs that indicate whether a person is paying attention and understanding a message or not.

We send verbal and nonverbal feedback while another person is talking and after they are done. Verbal and nonverbal signals we send while someone is talking, which can consist of verbal cues like “uh-huh,” “oh,” and “right,” and/or nonverbal cues like direct eye contact, head nods, and leaning forward. **Back-channel cues** are generally a form of positive feedback that indicates others are actively listening. People also send cues intentionally and unintentionally that indicate they aren’t listening. If another person is looking away, fidgeting, texting, or turned away, we will likely interpret those responses negatively.



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**Reflection** is a responding behavior that can also show that you understand what was communicated. When you reflect a message, you state back what you heard the speakers say in your own words. For example, you might say the following to start off a reflective response: “What I heard you say was...” or “It seems like you’re saying...” You can also ask clarifying questions to get more information. It is often a good idea to pair a paraphrase with a question to keep a conversation flowing. For example, you might pose the following reflection and question pair: “It seems like you believe you were treated unfairly. Is that right?” Or you might ask a standalone question like “What did your boss do that made you think he was ‘playing favorites?’” Make sure to reflect and/or ask questions once a person’s turn is over, because interrupting can also be interpreted as a sign of not listening. Reflection is also a good tool to use in computer-mediated communication, especially since miscommunication can occur due to a lack of nonverbal and other contextual cues.

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## Listening Types

Listening serves many purposes, and different situations require different types of listening. The type of listening we engage in affects our communication and how others respond to us. For example, when we listen to empathize with others, our communication will likely be supportive and open, which will then lead the other person to feel “heard” and supported and hopefully view the interaction positively.<sup>5</sup> The main types of listening we will discuss are discriminative, informational, critical, and empathetic.<sup>6</sup>

### Discriminative listening

**Discriminative listening** is a focused and usually instrumental type of listening that is primarily

physiological and occurs mostly at the receiving stage of the listening process. Here we engage in listening to scan and monitor our surroundings in order to isolate particular auditory or visual stimuli. For example, we may focus our listening on a dark part of the yard while walking the dog at night to determine if the noise we just heard presents us with any danger. Or we may look for a particular nonverbal cue to let us know our conversational partner received our message.<sup>7</sup> In the absence of a hearing impairment, we have an innate and physiological ability to engage in discriminative listening. Although this is the most basic form of listening, it provides the foundation on which more intentional listening skills are built. This type of listening can be refined and honed. Think of how musicians, singers, and mechanics exercise specialized discriminative listening to isolate specific aural stimuli and how actors, detectives, and sculptors discriminate visual cues that allow them to analyze, make meaning from, or recreate nuanced behavior.<sup>8</sup>

## Informational Listening

**Informational listening** is listening with the goal of comprehending and retaining information. This type of listening is not evaluative and is common in teaching and learning contexts ranging from a student listening to an informative speech to an out-of-towner listening to directions to the nearest gas station. We also use informational listening when we listen to news reports, voice mail, and briefings at work. Since retention and recall are important components of informational listening, good concentration and memory skills are key. These also happen to be skills that many college students struggle with, at least in the first years of college, but will be expected to have mastered once they get into professional contexts. In many professional contexts, informational listening is important, especially when receiving instructions. I caution my students that they will be expected to process verbal instructions more frequently in their profession than they are in college. Most college professors provide detailed instructions and handouts with assignments so students can review them as needed, but many supervisors and managers will expect you to take the initiative to remember or record vital information. Additionally, many bosses are not as open to questions or requests to repeat themselves as professors are.

## Critical Listening

**Critical listening** entails listening with the goal of analyzing or evaluating a message based on information presented verbally and information that can be inferred from context. A critical listener evaluates a message and accepts it, rejects it, or decides to withhold judgment and seek more information. As constant consumers of messages, we need to be able to assess the credibility of speakers and their messages and identify various persuasive appeals and **fallacies**. Critical listening is important during persuasive exchanges, but I recommend always employing some degree of critical listening, because you may find yourself in a persuasive interaction that you thought was informative. Critical-listening skills are useful when listening to a persuasive speech and when processing any of the persuasive media messages we receive daily. You can see judges employ

critical listening, with varying degrees of competence, on talent competition shows like *Rupaul's Drag Race*, *America's Got Talent*, and *The Voice*. While the exchanges between judge and contestant on these shows is expected to be subjective and critical, critical listening is also important when listening to speakers that have stated or implied objectivity, such as parents, teachers, political leaders, doctors, and religious leaders.

## Empathetic Listening

**Empathetic listening** is the most challenging form of listening and occurs when we try to understand or experience what a speaker is thinking or feeling. Empathetic listening is distinct from sympathetic listening. While the word *empathy* means to “feel into” or “feel with” another person, *sympathy* means to “feel for” someone. Sympathy is generally more self-oriented and distant than empathy.<sup>9</sup> Empathetic listening is other-oriented and should be genuine. Because of our own centrality in our perceptual world, empathetic listening can be difficult. It's often much easier for us to tell our own story or to give advice than it is to really listen to and empathize with someone else. We should keep in mind that sometimes others just need to be heard and our feedback isn't actually desired. Watch the “Empathy is Not Endorsement” Ted Talk in which Dylan Marron discusses key components of empathy.<sup>10</sup> Closed captioning is available on YouTube.



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## Listening Styles

Just as there are different types of listening, there are also different styles of listening. People may be categorized as one or more of the following listeners: people-oriented, action-oriented, content-oriented, and time-oriented listeners. Research finds that 40 percent of people have more than one preferred listening style, and that they choose a style based on the listening situation.<sup>11</sup> Other research finds that people often still revert back to a single preferred style in times of emotional or cognitive stress, even if they know a different style of listening would be better.<sup>12</sup> Following a brief overview of each listening style, we will explore some of their applications, strengths, and weaknesses.

- **People-oriented listeners** are concerned about the needs and feelings of others and may get distracted from a specific task or the content of a message in order to address feelings.
- **Action-oriented listeners** prefer well-organized, precise, and accurate information. They can

become frustrated when they perceive communication to be unorganized or inconsistent, or a speaker to be “long-winded.”

- **Content-oriented listeners** are analytic and enjoy processing complex messages. They like in-depth information and like to learn about multiple sides of a topic or hear multiple perspectives on an issue. Their thoroughness can be difficult to manage if there are time constraints.
- **Time-oriented listeners** are concerned with completing tasks and achieving goals. They do not like information perceived as irrelevant and like to stick to a timeline. They may cut people off and make quick decisions (taking short cuts or cutting corners) when they think they have enough information.

## People-oriented listeners

People-oriented listeners are concerned about the emotional states of others and listen with the purpose of offering support in interpersonal relationships. People-oriented listeners can be characterized as “supporters” who are caring and understanding. These listeners are sought out because they are known as people who will “lend an ear.” They may or may not be valued for the advice they give, but all people often want is a good listener. This type of listening may be especially valuable in interpersonal communication involving emotional exchanges, as a person-oriented listener can create a space where people can make themselves vulnerable without fear of being cut off or judged. People-oriented listeners are likely skilled empathetic listeners and may find success in supportive fields like counseling, social work, or nursing.

## Action-oriented listeners

Action-oriented listeners focus on what action needs to take place in regards to a received message and try to formulate an organized way to initiate that action. These listeners are frustrated by disorganization, because it detracts from the possibility of actually doing something. Action-oriented listeners can be thought of as “builders”—like an engineer, a construction site foreperson, or a skilled project manager. This style of listening can be very effective when a task needs to be completed under time, budgetary, or other logistical constraints. One research study found that people prefer an action-oriented style of listening in instructional contexts.<sup>13</sup> In other situations, such as interpersonal communication, action-oriented listeners may not actually be very interested in listening, instead taking a “What do you want me to do?” approach. A friend and colleague of mine who exhibits some qualities of an action-oriented listener once told me about an encounter she had with a close friend who had a stillborn baby. My friend said she immediately went into “action mode.” Although it was difficult for her to connect with her friend at an emotional/empathetic level, she was able to use her action-oriented approach to help out in other ways as she helped make funeral arrangements, coordinated with other family and friends, and handled the details that accompanied this tragic emotional experience. As you can see from this example, the action-oriented listening style often contrasts with the people-oriented listening style.

## Content-oriented listeners

Content-oriented listeners like to listen to complex information and evaluate the content of a message, often from multiple perspectives, before drawing conclusions. These listeners can be thought of as “learners,” and they also ask questions to solicit more information to fill out their understanding of an issue. Content-oriented listeners often enjoy high perceived credibility because of their thorough, balanced, and objective approach to engaging with information. Content-oriented listeners are likely skilled informational and critical listeners and may find success in academic careers in the humanities, social sciences, or sciences. Ideally, judges and politicians would also possess these characteristics.

## Time-oriented listeners

Time-oriented listeners are more concerned about time limits and timelines than they are with the content or senders of a message. These listeners can be thought of as “executives,” and they tend to actually verbalize the time constraints under which they are operating.



*Photo by Thirdman from Pixabay*

For example, a time-oriented supervisor may say the following to an employee who has just entered his office and asked to talk: “Sure, I can talk, but I only have about five minutes.” These listeners may also exhibit nonverbal cues that indicate time and/or attention shortages, such as looking at a clock, avoiding eye contact, or nonverbally trying to close down an interaction. Time-oriented listeners are also more likely to interrupt others, which may make them seem insensitive to emotional/personal needs. People often get action-oriented and time-oriented listeners confused. Action-oriented listeners would be happy to get to a conclusion or decision quickly if they perceive that they are acting on well-organized and accurate information. They would, however, not mind taking longer to reach a conclusion when dealing with a complex topic, and they would delay making a decision

if the information presented to them didn't meet their standards of organization. Unlike time-oriented listeners, action-oriented listeners are not as likely to cut people off (especially if people are presenting relevant information) and are not as likely to take short cuts.

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## Barriers to Effective Listening

Barriers to effective listening are present at every stage of the listening process.<sup>14</sup> At the receiving stage, noise can block or distort incoming stimuli. At the interpreting stage, complex or abstract information may be difficult to relate to previous experiences, making it difficult to reach understanding. At the recalling stage, natural limits to our memory and challenges to concentration can interfere with remembering. At the evaluating stage, personal biases and prejudices can lead us to block people out or assume we know what they are going to say. At the responding stage, a lack of reflection and questioning skills can lead to misunderstanding.

### Environmental, physical, and psychological barriers to listening

**Environmental noise**, such as lighting, temperature, and furniture affect our ability to listen. A room that is too dark can make us sleepy, just as a room that is too warm or cool can raise awareness of our physical discomfort to a point that it is distracting. Some seating arrangements facilitate listening, while others separate people. In general, listening is easier when listeners can make direct eye contact with and are in close physical proximity to a speaker. The ability to effectively see and hear a person increases people's confidence in their abilities to receive and process information. Eye contact and physical proximity can still be affected by noise. Environmental noises such as a whirring air conditioner, barking dogs, or a ringing fire alarm can obviously interfere with listening despite direct lines of sight and well-placed furniture.

**Physiological noise**, likewise, can interfere with our ability to process incoming information. This is considered a physical barrier to effective listening because it emanates from our physical body. Ailments such as a cold, a broken leg, a headache, or a poison ivy outbreak can range from annoying to unbearably painful and impact our listening relative to their intensity. Another type of noise, psychological noise, bridges physical and cognitive barriers to effective listening.

**Psychological noise** can facilitate or impede listening. Any mood or state of arousal—positive or negative—that is too far above or below our regular baseline creates a barrier to message reception and processing. The generally positive emotional state of being in love can be just as much of a barrier as feeling hatred. Excited arousal can also distract as much as anxious arousal. Stress about an upcoming events ranging from losing a job, to having surgery, to wondering about what to eat for lunch can overshadow incoming messages. The body and mind are not completely separate and can interact in ways that further interfere with listening. Fatigue, for example, is usually a

combination of psychological and physiological noise that manifests as stress (psychological) and weakness, sleepiness, and tiredness (physiological).

## Cognitive and personal barriers to listening

Cognitive limits, a lack of listening preparation, difficult or disorganized messages, and prejudices can also interfere with listening. Whether you call it multitasking, daydreaming, glazing over, or drifting off, we all cognitively process other things while receiving messages.

## Difference between speech and thought rate

Our ability to process more information than what comes from one speaker or source creates a barrier to effective listening. While people speak at a rate of 125 to 175 words per minute, we can process between 400 and 800 words per minute.<sup>15</sup> This gap between speech rate and thought rate gives us an opportunity to side-process any number of thoughts that can be distracting from a more important message. Because of this gap, it is impossible to give one message our “undivided attention,” but we can occupy other channels in our minds with thoughts related to the central message. For example, using some of your extra cognitive processing abilities to repeat, rephrase, or reorganize messages coming from one source allows you to use that extra capacity in a way that reinforces the primary message.

The difference between speech and thought rate connects to personal barriers to listening, as personal concerns are often the focus of competing thoughts that can take us away from listening and challenge our ability to concentrate on others’ messages. Two common barriers to concentration are self-centeredness and lack of motivation.<sup>16</sup> For example, when our self-consciousness is raised, we may be too busy thinking about how we look, how we’re sitting, or what others think of us to be attentive to an incoming message. Additionally, we are often challenged when presented with messages that we do not find personally relevant. In general, we employ **selective attention**, which refers to our tendency to pay attention to the messages that benefit us in some way and filter others out. So the student who is checking his or her Twitter feed during class may suddenly switch his or her attention back to the previously ignored professor when the following words are spoken: “This will be important for the exam.”



*Photo by Thirdman from Pexels*

Another common barrier to effective listening that stems from the speech and thought rate divide is **response preparation**. Rehearsal of what we will say once a speaker's turn is over is an important part of the listening process that takes place between the recalling and evaluation and/or the evaluation and responding stage. Rehearsal becomes problematic when response preparation begins as someone is receiving a message and hasn't had time to engage in interpretation or recall. In this sense, we are listening with the goal of responding instead of with the goal of understanding, which can lead us to miss important information that could influence our response.

## More Barriers

Another barrier to effective listening is a general lack of listening preparation. Unfortunately, most people have never received any formal training or instruction related to listening. Although some people think listening skills just develop over time, competent listening is difficult, and enhancing listening skills takes concerted effort. Even when listening education is available, people do not embrace it as readily as they do opportunities to enhance their speaking skills. Listening is often viewed as an annoyance or a chore, or just ignored or minimized as part of the communication process. In addition, our individualistic society values speaking more than listening, as it's the speakers who are sometimes literally in the spotlight. Although listening competence is a crucial part of social interaction and many of us value others we perceive to be "good listeners," listening just doesn't get the same kind of praise, attention, instruction, or credibility as speaking. Teachers, parents, and relational partners explicitly convey the importance of listening through statements like "You better listen to me," "Listen closely," and "Listen up," but these demands are rarely paired with concrete instruction. So unless you plan on taking more communication courses in the future (and I hope you do), this chapter may be the only instruction you receive on the basics of the listening process, some barriers to effective listening, and how we can increase our listening competence.



Photo by Christina Morillo from Pexels

Bad messages and/or speakers also present a barrier to effective listening. Sometimes our trouble listening originates in the sender. In terms of message construction, poorly structured messages or messages that are too vague, too jargon filled, or too simple can present listening difficulties. In terms of speakers' delivery, verbal fillers, monotone voices, distracting movements, or a disheveled appearance can inhibit our ability to cognitively process a message.<sup>17</sup> Listening also becomes difficult when a speaker tries to present too much information. Information overload is a common barrier to effective listening that good speakers can help mitigate by building redundancy into their speeches and providing concrete examples of new information to help audience members interpret and understand the key ideas.

## Prejudice as a barrier to listening

Oscar Wilde said, "You see, it is a very dangerous thing to listen. If one listens one may be convinced..."<sup>18</sup> Unfortunately, some of our default ways of processing information and perceiving others lead us to rigid ways of thinking. When we engage in prejudiced listening, we are usually trying to preserve our ways of thinking and avoid being convinced of something different. This type of prejudice is a barrier to effective listening, because when we prejudge a person based on his or her identity or ideas, we usually stop listening in an active and/or ethical way.

We exhibit prejudice in our listening in several ways, some of which are more obvious than others. For example, we may claim to be in a hurry and only selectively address the parts of a message that we agree with or that aren't controversial. We can also operate from a state of denial where we avoid a subject or person altogether so that our views are not challenged. Prejudices that are based on a person's identity, such as race, age, occupation, or appearance, may lead us to assume that we know what he or she will say, essentially closing down the listening process. Keeping an open mind and engaging in perception checking can help us identify prejudiced listening and hopefully shift into more competent listening practices.

## Inattentional blindness as a barrier to listening

Do you regularly spot editing errors in movies? Can you multitask effectively, texting while talking with your friends or watching television? Are you fully aware of your surroundings? If you answered yes to any of those questions, you're not alone. And, you're most likely wrong.

More than 50 years ago, experimental psychologists began documenting the many ways that our perception of the world is limited, not by our eyes and ears, but by our minds. We appear able to process only one stream of information at a time, effectively filtering other information from awareness. To a large extent, we perceive only that which receives the focus of our cognitive efforts: our attention.

Imagine the following task, known as **dichotic listening**: You put on a set of headphones that play two completely different speech streams, one to your left ear and one to your right ear. Your task is to repeat each syllable spoken into your left ear as quickly and accurately as possible, mimicking each sound as you hear it. When performing this attention-demanding task, you won't notice if the speaker in your right ear switches to a different language or is replaced by a different speaker with a similar voice. You won't notice if the content of their speech becomes nonsensical. In effect, you are deaf to the substance of the ignored speech. But, that is not because of the limits of your auditory senses. It is a form of cognitive deafness, due to the nature of focused, selective attention. Even if the speaker on your right headphone says your name, you will notice it only about one-third of the time.<sup>19</sup> And, at least by some accounts, you only notice it that often because you still devote some of your limited attention to the ignored speech stream.<sup>202122</sup> In this task, you will tend to notice only large physical changes (e.g., a switch from a male to a female speaker), but not substantive ones, except in rare cases.

This selective listening task highlights the power of attention to filter extraneous information from awareness while letting in only those elements of our world that we want to hear. Focused attention is crucial to our powers of observation, making it possible for us to zero in on what we want to see or hear while filtering out irrelevant distractions. But, it has consequences as well: We can miss what would otherwise be obvious and important signals.

The same pattern holds for vision. In a groundbreaking series of studies in the 1970s and early 1980s, Neisser and his colleagues devised a visual analogue of the dichotic listening task.<sup>23</sup> Their subjects viewed a video of two distinct, but partially transparent and overlapping, events. For example, one event might involve two people playing a hand-clapping game and the other might show people passing a ball. Because the two events were partially transparent and overlapping, both produced sensory signals on the retina regardless of which event received the participant's attention. When participants were asked to monitor one of the events by counting the number of times the actors performed an action (e.g., hand clapping or completed passes), they often failed to notice unexpected events in the ignored video stream (e.g., the hand-clapping players stopping their game and shaking hands). As for dichotic listening, the participants were unaware of events happening outside the focus of their attention, even when looking right at them. They could tell that other "stuff" was happening on the screen, but many were unaware of the meaning or substance of that stuff.

Have you ever been paying attention to something so closely you missed another event in the background? Or have you ever been so used to seeing something a certain way that when it changed, you didn't even notice it had?

To test the power of selective attention to induce failures of awareness, Neisser and colleagues designed a variant of this task in which participants watched a video of two teams of players, one wearing white shirts and one wearing black shirts.<sup>24</sup> Subjects were asked to press a key whenever the players in white successfully passed a ball, but to ignore the players in black. As for the other videos, the teams were filmed separately and then superimposed so that they literally occupied the same space (they were partially transparent). Partway through the video, a person wearing a raincoat and carrying an umbrella strolled through the scene. People were so intently focused on spotting

passes that they often missed the “umbrella woman.” (If you look closely at the video, you’ll see that Ulric Neisser plays on both the black and white teams.)

These surprising findings were well known in the field, but for decades, researchers dismissed their implications because the displays had such an odd, ghostly appearance. Of course, we would notice if the displays were fully opaque and vivid rather than partly transparent and grainy. Surprisingly, no studies were built on Neisser’s method for nearly 20 years. Inspired by these counterintuitive findings and after discussing them with Neisser himself, Christopher Chabris and Daniel Simons revisited them in the late 1990s.<sup>25</sup> They replicated Neisser’s work, again finding that many people missed the umbrella woman when all of the actors in the video were partially transparent and occupying the same space. But, they added another wrinkle: a version of the video in which all of the actions of both teams of players were choreographed and filmed with a single camera. The players moved in and around each other and were fully visible. In the most dramatic version, Simons and Chabris had a woman in a gorilla suit walk into the scene, stop to face the camera, thump her chest, and then walk off the other side after nine seconds on screen. Fully half the observers missed the gorilla when counting passes by the team in white.

This phenomenon is now known as **inattention blindness**.<sup>26</sup> The past 15 years has seen a surge of interest in such failures of awareness, and we now have a better handle on the factors that cause people to miss unexpected events as well as the range of situations in which inattention blindness occurs. People are much more likely to notice unexpected objects that share features with the attended items in a display.<sup>27</sup> For example, if you count passes by the players wearing black, you are more likely to notice the gorilla than if you count passes by the players wearing white because the color of the gorilla more closely matches that of the black-shirted players<sup>28</sup>. However, even unique items can go unnoticed. In one task, people monitored black shapes and ignored white shapes that moved around a computer window.<sup>29</sup> Approximately 30 percent of them failed to detect the bright red cross traversing the display, even though it was the only colored item and was visible for five seconds. The more effort a cognitive task requires, the more likely it becomes that you’ll miss noticing something significant.

Inattention blindness is not just a laboratory curiosity—it also occurs in the real world and under more natural conditions. In a dramatic illustration of cell phone–induced inattention blindness, Hymen et al. observed that people talking on a cell phone as they walked across a college campus were less likely than other pedestrians to notice a unicycling clown who rode across their path.<sup>30</sup>

Recently, the study of this sort of awareness failure has returned to its roots in studies of listening, with studies documenting **inattention deafness**: When listening to a set of spatially localized conversations over headphones, people often fail to notice the voice of a person walking through the scene repeatedly stating “I am a gorilla.”<sup>31</sup> Under conditions of focused attention, we see and hear far less of the unattended information than we might expect.<sup>32,33</sup>

What makes these findings interesting and important is that they run counter to our intuitions. Most people are confident they would notice the chest-thumping gorilla. In fact, nearly 90% believe they would spot the gorilla,<sup>34</sup> and in a national survey, 78% agreed with the statement, “People generally notice when something unexpected enters their field of view, even when they’re paying attention to

something else”<sup>35</sup>. Similarly, people are convinced that they would spot errors in movies or changes to a conversation partner<sup>36</sup>. We think we see and remember far more of our surroundings than we actually do. Most of the time, we are happily unaware of what we have missed, but we are fully aware of those elements of a scene that we have noticed. Consequently, if we assume our experiences are representative of the state of the world, we will conclude that we notice unexpected events. We don’t easily think about what we’re missing.

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## Improving Listening Competence

Many people admit that they could stand to improve their listening skills. This section will help us do that. In this section, we will learn strategies for developing and improving competence at each stage of the listening process. We will also define active listening and the behaviors that go along with it.

### Listening competence at each stage of the listening process

We can develop competence within each stage of the listening process, as the following list indicates:<sup>37</sup>

- To improve listening at the receiving stage,
  - prepare yourself to listen,
  - discern between intentional messages and noise,
  - concentrate on stimuli most relevant to your listening purpose(s) or goal(s),
  - be mindful of the selection and attention process as much as possible,
  - avoid interrupting someone while they are speaking in order to maintain your ability to receive stimuli and listen, and,
  - pay attention so you can follow the conversational flow.
- To improve listening at the interpreting stage,
  - identify main points and supporting points;
  - use contextual clues from the person or environment to discern additional meaning;
  - be aware of how a relational, cultural, or situational context can influence meaning;
  - be aware of the different meanings of silence; and
  - note differences in tone of voice and other paralinguistic cues that influence meaning.
- To improve listening at the recalling stage,
  - use multiple sensory channels to decode messages and make more complete memories;

- repeat, rephrase, and reorganize information to fit your cognitive preferences;
  - use mnemonic devices as a gimmick to help with recall.
- To improve listening at the evaluating stage,
    - separate facts, inferences, and judgments;
    - be familiar with and able to identify persuasive strategies and fallacies of reasoning;
    - assess the credibility of the speaker and the message; and
    - be aware of your own biases and how your perceptual filters can create barriers to effective listening.
  - To improve listening at the responding stage,
    - reflect information to check understanding,
    - ask appropriate clarifying and follow-up questions,
    - give feedback that is relevant to the speaker's purpose/motivation for speaking,
    - adapt your response to the speaker and the context, and
    - do not let the preparation and rehearsal of your response diminish earlier stages of listening.

## Active Listening

Active listening refers to the process of pairing outwardly visible positive listening behaviors with positive cognitive listening practices. Active listening can help address many of the environmental, physical, cognitive, and personal barriers to effective listening that we discussed earlier. The behaviors associated with active listening can also enhance informational, critical, and empathetic listening.

### Active listening can help overcome barriers to effective listening

Being an active listener starts before you actually start receiving a message. Active listeners make strategic choices and take action in order to set up ideal listening conditions. Physical and environmental noises can often be managed by moving locations or by manipulating the lighting, temperature, or furniture. When possible, avoid important listening activities during times of distracting psychological or physiological noise. For example, we often know when we're going to be hungry, full, more awake, less awake, more anxious, or less anxious, and advance planning can alleviate the presence of these barriers. For college students, who often have some flexibility in their class schedules, knowing when you best listen can help you make strategic choices regarding what class to take when. And student options are increasing, as some colleges are offering classes in the overnight hours to accommodate working students and students who are just "night owls."<sup>38</sup> Of

course, we don't always have control over our schedule, in which case we will need to utilize other effective listening strategies that we will learn more about later in this chapter.

In terms of cognitive barriers to effective listening, we can prime ourselves to listen by analyzing a listening situation before it begins. For example, you could ask yourself the following questions:

1. "What are my goals for listening to this message?"
2. "How does this message relate to me / affect my life?"
3. "What listening type and style are most appropriate for this message?"

As we learned earlier, the difference between speech and thought processing rate means listeners' level of attention varies while receiving a message. Effective listeners must work to maintain focus as much as possible and refocus when attention shifts or fades.<sup>39</sup> One way to do this is to find the motivation to listen. If you can identify intrinsic and or extrinsic motivations for listening to a particular message, then you will be more likely to remember the information presented. Ask yourself how a message could impact your life, your career, your intellect, or your relationships. This can help overcome our tendency toward selective attention. As senders of messages, we can help listeners by making the relevance of what we're saying clear and offering well-organized messages that are tailored for our listeners.

## Active listening behaviors

From the suggestions discussed previously, you can see that we can prepare for active listening in advance and engage in certain cognitive strategies to help us listen better. We also engage in active listening behaviors as we receive and process messages.

Paying attention is a key sign of active listening. Speakers usually interpret a listener's eye contact and body language as a signal of attentiveness. While a lack of eye contact may indicate inattentiveness, it can also signal cognitive processing.

When we look away to process new information, we usually do it unconsciously. Be aware, however, that your conversational partner may interpret this as not listening. If you really do need to take a moment to think about something, you could indicate that to the other person by saying, "That's new information to me. Give me just a second to think through it." We already learned the role that back-channel cues play in listening. An occasional head nod and "uh-huh" signal that you are paying attention. However, when we give these cues as a form of "autopilot" listening, others can usually tell that we are pseudo-listening, and whether they call us on it or not, that impression could lead to negative judgments.

A more direct way to indicate active listening is to reflect previous statements made by the speaker. Norms of politeness usually call on us to reflect a past statement or connect to the speaker's current thought before starting a conversational turn. Being able to summarize what someone said to ensure that the topic has been satisfactorily covered and understood or being able to segue

in such a way that validates what the previous speaker said helps regulate conversational flow. Asking probing questions is another way to directly indicate listening and to keep a conversation going, since they encourage and invite a person to speak more. You can also ask questions that seek clarification and not just elaboration. Speakers should present complex information at a slower speaking rate than familiar information, but many will not. Remember that your nonverbal feedback can be useful for a speaker, as it signals that you are listening but also whether or not you understand. If a speaker fails to read your nonverbal feedback, you may need to follow up with verbal communication in the form of paraphrased messages and clarifying questions.

As active listeners, we want to be excited and engaged, but don't let excitement manifest itself in interruptions. Being an active listener means knowing when to maintain our role as listener and resist the urge to take a conversational turn. Research shows that people with higher social status are more likely to interrupt others, so keep this in mind and be prepared for it if you are speaking to a high-status person, or try to resist it if you are the high-status person in an interaction.<sup>40</sup>

Note-taking can also indicate active listening. Translating information through writing into our own cognitive structures and schemata allows us to better interpret and assimilate information. Of course, note-taking isn't always a viable option. It would be fairly awkward to take notes during a first date or a casual exchange between new coworkers. But in some situations where we wouldn't normally consider taking notes, a little awkwardness might be worth it for the sake of understanding and recalling the information. For example, many people don't think about taking notes when getting information from their doctor or banker. I actually invite students to take notes during informal meetings because I think they sometimes don't think about it or don't think it's appropriate. But many people would rather someone jot down notes instead of having to respond to follow-up questions on information that was already clearly conveyed. To help facilitate your note-taking, you might say something like "Do you mind if I jot down some notes? This seems important."

In summary, active listening is exhibited through verbal and nonverbal cues, including steady eye contact with the speaker; smiling; slightly raised eyebrows; upright posture; body position that is leaned in toward the speaker; nonverbal back-channel cues such as head nods; verbal back-channel cues such as "OK," "mmhum," or "oh"; and a lack of distracting mannerisms like doodling or fidgeting.<sup>41</sup>

## Active Listening and Conflict

Active listening is challenging in calm everyday settings as we have seen. And I'm sad to report, it's even harder in times of conflict. When your brain is under the stress of conflict, it is extremely challenging to actively listen to what someone else is saying, because in a conflict situation you likely disagree with everything that is coming out of their mouth. In conflict is where the barriers to listening we saw in a previous chapter happen the most.

Think back to the idea of inattentional blindness. How do you think that impacts you in a conflict? Have you ever thought back to a high conflict situation and realized that you *missed* a key piece of

information that was shared? Likely because in the heat of the moment you were too focused on either getting your point across, making your case, or figuring out how to make this conflict end. Inattentional blindness in conflict means that we are likely to miss key pieces of information, verbal or nonverbal. The more effort a cognitive task requires the more likely it becomes that you'll miss noticing something significant. This in and of itself can lead to more conflict.

Or what about the difference between the speech and thought rate? You can process information at significantly higher rate than someone can share with you. In a conflict situation, you can process *every* previous conversation or conflict you have had with this person and still “hear” what they said. But you aren't really listening when that is happening.

So what can you do about these challenges in a conflict situation? First, recognize that we are all wired to be distracted AND that you will likely miss something. Second, maximize the attention you do have available by avoiding distractions. The ring of a new call or the ding of a new text are hard to resist, so make it impossible to succumb to the temptation by turning your phone off or putting it somewhere out of reach when you are driving. If you know that you will be tempted and you know that using your phone will increase inattentional blindness, you must be proactive. Third, don't be afraid to slow down and pause a conversation because you were *actively listening* to someone. You build stronger relationships by showing people that you are truly listening to them and will give the hard conversations the time they deserve.

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## Questions – The Key to Listening

The key to asking really great questions is being a really great listener. If you are listening, actively, you will recognize what information you are missing, or what you need clarification on. Below is a look at some basic types of questions to understand and master.



*Photo by terimakasih0 from Pixabay*

There is a general distinction made between **Open Ended Question**, questions that likely require some thought and/or more than a yes/no answer, and **Close Ended Questions**, questions that only require a specific answer and/or a yes/no answer. This is an important distinction to understand and remember. In the context of managing conflict open ended questions are utilized for Information Gathering and close ended questions are used for Clarifying concepts or ideas you have heard. Here are examples of these types of questions.

### Clarifying Questions (Close-Ended)

- Is this what you said...?
- Did I hear you say...?

- Did I understand you when you said...?
- Did I hear you correctly when you said...?
- Did I paraphrase what you said correctly?
- So this took place on....?
- So you would like to see...?

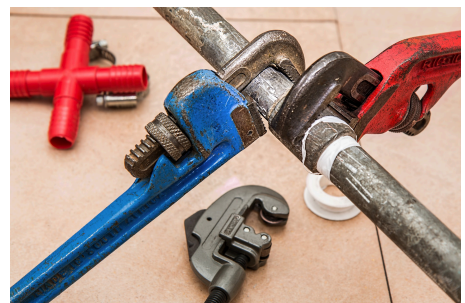
## Information Gathering Questions (Open-Ended)

- If there was one small way that things could be better starting today, what would that be?
- How did you feel when...?
- How could you have handled it differently?
- When did it began?
- When did you first notice...?
- When did that happen?
- Where did it happen?
- What was that all about?
- What happened then?
- What would you like to do about it?
- I want to understand from your perspective, would you please tell me again?
- What do you think would make this better going forward?
- What criteria did you use to...?
- What's another way you might...?
- What resources were used for the project?
- Tell me more about... (not a question, but an open-ended prompt)

A type of question to watch out for is **Leading Questions**, which provide a direction or answer for someone to agree or disagree with. An example would be, “So you are going to vote for \_\_\_ for president, aren’t you?” or “What they did is unbelievable, don’t you agree?” These questions can easily be turned into information-gathering questions, such as “Who are you going to vote for this year?” or “What do you think about their behavior?”

## Using Listening Tools for Building Self-Awareness

One of the greatest gifts we can give ourselves is reflecting upon our strengths and weaknesses when it comes to our communication and conflict management skills and how they impact the relationships in our lives. Understanding our



*Photo by stevepb from Pixabay*

capability to actively listen, how we express ourselves and our ideas, how we frame our intent and purposes, and how we present ourselves non-verbally can provide insight into the success and failure of friendships or romantic relationships, as well as the depth of connection we have with our family or coworkers.

The frameworks and tools in this chapter allow us to consider and understand:

- what type of listener you are
- what style of listening do you use most regularly
- what barriers to listening do you experience
- how you express yourself and your story (i-statements or you-statements)
- how effective you are at asking questions
- how you frame your conversations and your ability to reframe a conversation when necessary
- how you communicate nonverbally and it's impact on your relationships

Once we understand ourselves in these ways, we can ask ourselves the hard questions: where am I successful in utilizing these tools, and where can I improve? Taking an honest inventory of our communication and conflict management skills allows us to accurately identify what we should keep doing and what we should stop doing. Things to consider in this reflection process:

- ask for feedback about your skills from someone you trust
- think about successful relationships you have and consider what makes them so great – do more of that
- think about unsuccessful relationships you have and consider what makes them not so great – do less of that
- consider your role models, or people that have positively impacted you in your life, how do they communicate and manage conflict, this could provide interesting insight into areas to improve yourself

From these reflections, pick 1 or 2 small things that you want to work on to either continue doing, potentially with more frequency or that you want to improve. As the saying goes, you can't boil the ocean. You also can't change everything about your communication and conflict management styles at one time. Often 1 or 2 changes is plenty for the brain to work on. Commit to yourself when and where you will try to improve and set a time to check back in with yourself to reflect on how the change is going.

## **Using these tools for Other Awareness Building**

Once we understand ourself, we can move into the utilization of these skills to understand others. You can consider:

- what type of listener are they

- what style of listening do you think they have
- what barriers to listening do you see or experience when talking to them
- how you they express themselves and their story (i-statements or you-statements)
- do they ask you questions and are they effective
- do they frame or reframe a conversation when necessary
- what they communicate nonverbally and it's impact on you

You can combine your question asking and your listening skills to really dig into understanding others and their skills. You can watch for nonverbal cues and work towards utilizing the empathetic listening style to understand the perspective of another person.

## Using these tools for relationship-building

After you understand yourself and others in these frameworks, you can start analyzing where some of these ideas can cause conflict and move towards managing these differences in a productive manner. For example –

You are a time-oriented listener and your best friend is a people-oriented listener. Your friend wants to focus on your feelings and needs and you are just looking to get to the point as quickly as possible. This is a very common difference.

The strange and interesting thing here is that in this dynamic, you could have a *primary conflict* (lets say you and your best friend are in a conflict about how to spend the up coming weekend) and now you also have a *secondary conflict*, that comes from the difference in the way you want to address the primary conflict. Often times the primary conflict and secondary conflict become inseparable. Listening for these kinds of differences helps us disentangle the primary conflict from the secondary conflicts. Once we recognize them we can use our framing and reframing skills to manage these differences directly. For example:

Reframe – “I think we are approaching this conversation differently. (*I-Statement*) It sounds like focusing on the task and solving this problem quickly is important to you (*Reflection*) and for me I want to make sure we address our feelings and the impact of this situation on our friendship (*Frame*). Are you okay with addressing both side of this situation knowing we both want a positive solution in this situation?” (*Clarifying question*)

We build relationships by putting these tools together. Listening is the foundation, expressing ourselves through I-Statements, asking questions to understand and clarify, and framing and reframing the conflict and why it is important allows us to really connect with the people around us, through empathy and understanding, and build relationships with mutual respect and purpose.

## Additional Resources

1. Why It's Worth Listening to People You Disagree With, YouTube Video
2. If You Aspire To Be A Great Leader, Be Present, by Rasmus Hougaard and Jacqueline Carter, Harvard Business Review

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# Chapter 7: Consumer Buying Behavior & The Customer Journey

## Learning Objectives

After reviewing this information, you will be able to:

1. Define consumer buying behavior.
2. Explain the nature of the buyer's black box.
3. Explain the key factors that influence consumer behavior and decision-making: cultural, societal, personal, psychological and situational.
4. Understand the stages of the customer buying process and how service can influence outcomes.
5. Identify and analyze the components of a customer journey map, distinguishing between marketing and service-driven touchpoints.
6. Apply customer journey mapping to improve service delivery and customer satisfaction.

## Consumer Buying Behavior Defined

How many buying decisions did you make today? Perhaps you stopped on the way to work or class to buy a soft drink or coffee, went to the grocery store on the way home to get bread or milk, or ordered something online. You likely make buying decisions nearly every day and probably don't give most of those decisions much thought. But how you make those decisions is significant for business owners, marketers, and customer-facing staff because if they can understand *why* you buy what you buy and *when* you buy it, they can use that information to enhance customer service and satisfaction...and boost revenue.

**Consumer buying behavior** refers to the decisions and actions people undertake to buy products or services for personal use. In other words, it's the actions you take before buying a product or service, and as you will see, many factors influence that behavior. You and all other consumers combine to make up the consumer market.

## The Buyer's Black Box

It stands to reason that the hundreds of millions of people who make up the global consumer

market don't all buy the same products and services. Why do certain people prefer different items than others? The answer lies in the factors that influence consumer buying behavior. One model of consumer buying behavior is what's known as the **buyer's black box**, which is named as such because little is known about what goes on in the human mind. It's also known as the stimulus-response model.

As illustrated in the model shown in Figure 3.1 consumer buying behavior is based on stimuli coming from a variety of sources—from marketers in terms of the **4Ps (product, price, promotion, and place)**, as well as from environmental stimuli, such as economic factors, legal/political factors, and technological and cultural factors.

These stimuli go into your “black box,” which consists of two parts: buyer characteristics such as beliefs and attitudes, motives, perceptions, and values, and the buyer decision-making process, which is covered later in the chapter. Your response is the outcome of the thinking that takes place in that black box. What will you buy, where, when, how often, and how much?

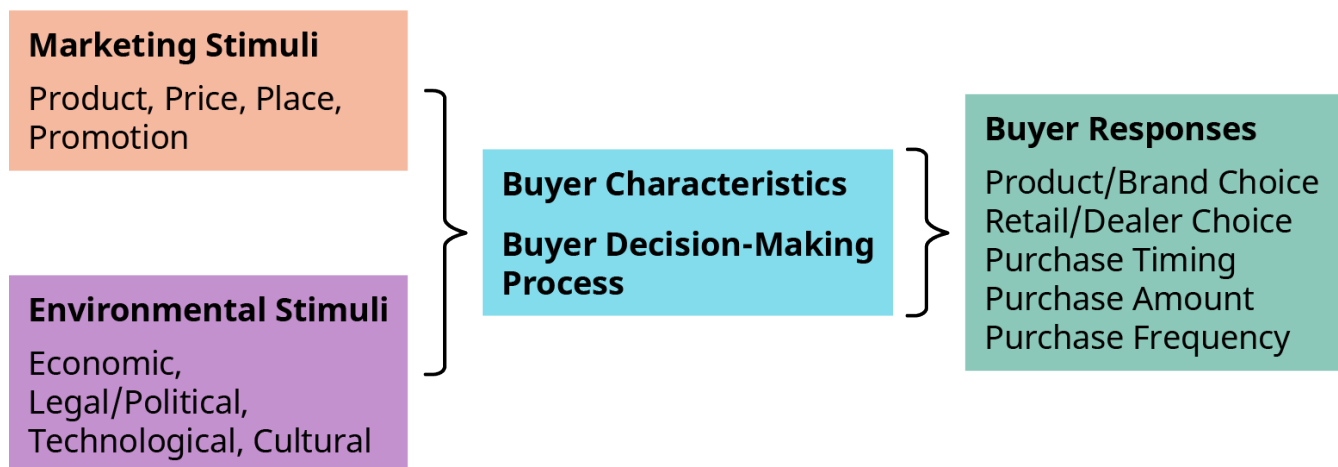


Figure 7.1 Marketing stimuli (Product, Price, Place, and Promotion) and Environmental stimuli (Economic, Legal Political, Technological, and Cultural) affect your buyer characteristics and buyer decision-making process. The outcome of this thinking is your buyer response, which includes product or brand choice, retailer or dealer choice, purchase timing, purchase amount, and purchase frequency. (Copyright Rice University, OpenStax, under CC BY 4.0 license)

## Types of Consumer Buying Behavior

Buying behavior is not influenced solely by the external environment. It's also determined by your level of involvement in a purchase and the amount of risk involved in the purchase. There are four types of consumer buying behavior, as shown below:

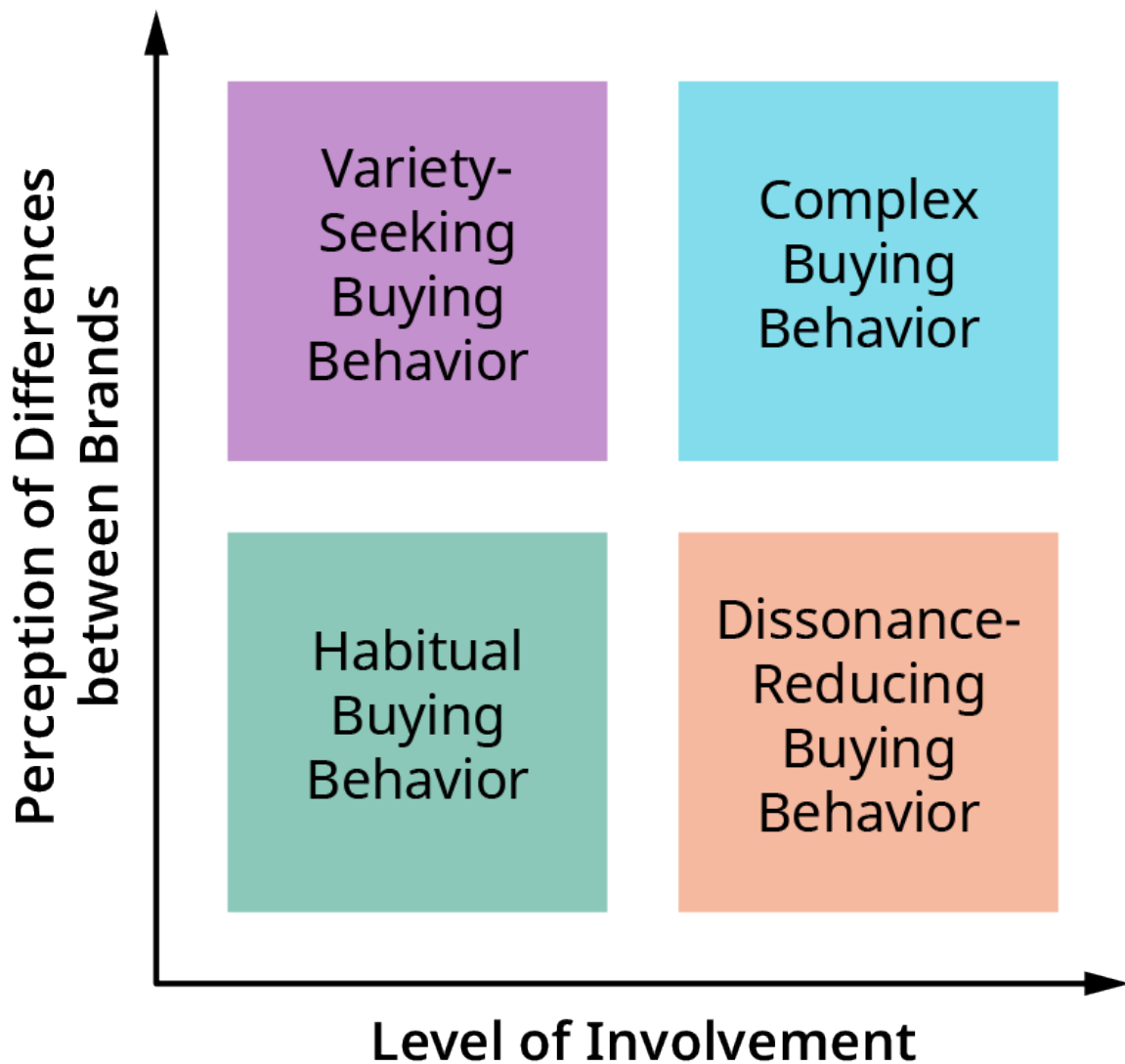


Figure 7.2 The four types of consumer buying behavior are shown along an x and y axis. The x axis is labeled Level of Involvement and the y axis is labeled Perception of Differences between Brands. Dissonance-reducing buying behavior is a buying behavior with a high level of involvement but a low level of perception of differences between brands. Habitual buying behavior has both a low level of involvement and a low level of perception of differences between brands. Complex buying behavior has both a high level of involvement and a high level of perception of differences between brands. And variety-seeking buying behavior has a low level of involvement but a high level of perception of differences between brands. (Copyright Rice University, OpenStax, under CC BY 4.0 license)

**Complex buying behavior** occurs when you make a significant or expensive purchase, like buying a new car. Because you likely don't buy a new car frequently, you're highly involved in the buying decision, and you probably research different vehicles or talk with friends or family before reaching your decision. By that time, you're likely convinced that there's a significant difference among cars, and you've developed your own unique set of criteria that helps you decide on your purchase.

**Dissonance-reducing buying behavior** occurs when you're highly involved in a purchase but see

little difference among brands. Let's say you're replacing the flooring in your kitchen with ceramic tile—another expensive, infrequent purchase. You might think that all brands of ceramic tile in a certain price range are “about the same,” so you might shop around to see what's available, but you'll probably buy rather quickly, perhaps as a result of a good price or availability. However, after you've made your purchase, you may experience post-purchase dissonance (also known as buyer's remorse) when you notice some disadvantages of the tile you purchased or hear good things about a brand you didn't purchase.

**Habitual buying behavior** has low involvement in the purchase decision because it's often a repeat buy, and you don't perceive much brand differentiation. Perhaps you usually buy a certain brand of organic milk, but you don't have strong brand loyalty. If your regular brand isn't available at the store or another brand is on sale, you'll probably buy a different brand.

**Variety-seeking buying behavior** has the lowest customer involvement because brand switching is your norm. You may not be unhappy with your last purchase of tortilla chips, but you simply want to try something new. It's a matter of brand switching for the sake of variety rather than because of dissatisfaction with your previous purchase.

## The 4Ps and Consumer Behavior

Watch this short, humorous 4Ps video as a way to help you remember the concept. This video also includes several examples of target markets and how a marketer might respond.

Access *The 4 Ps of The Marketing Mix Simplified*. Closed captioning is available on YouTube.



*One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=439#oembed-1>*

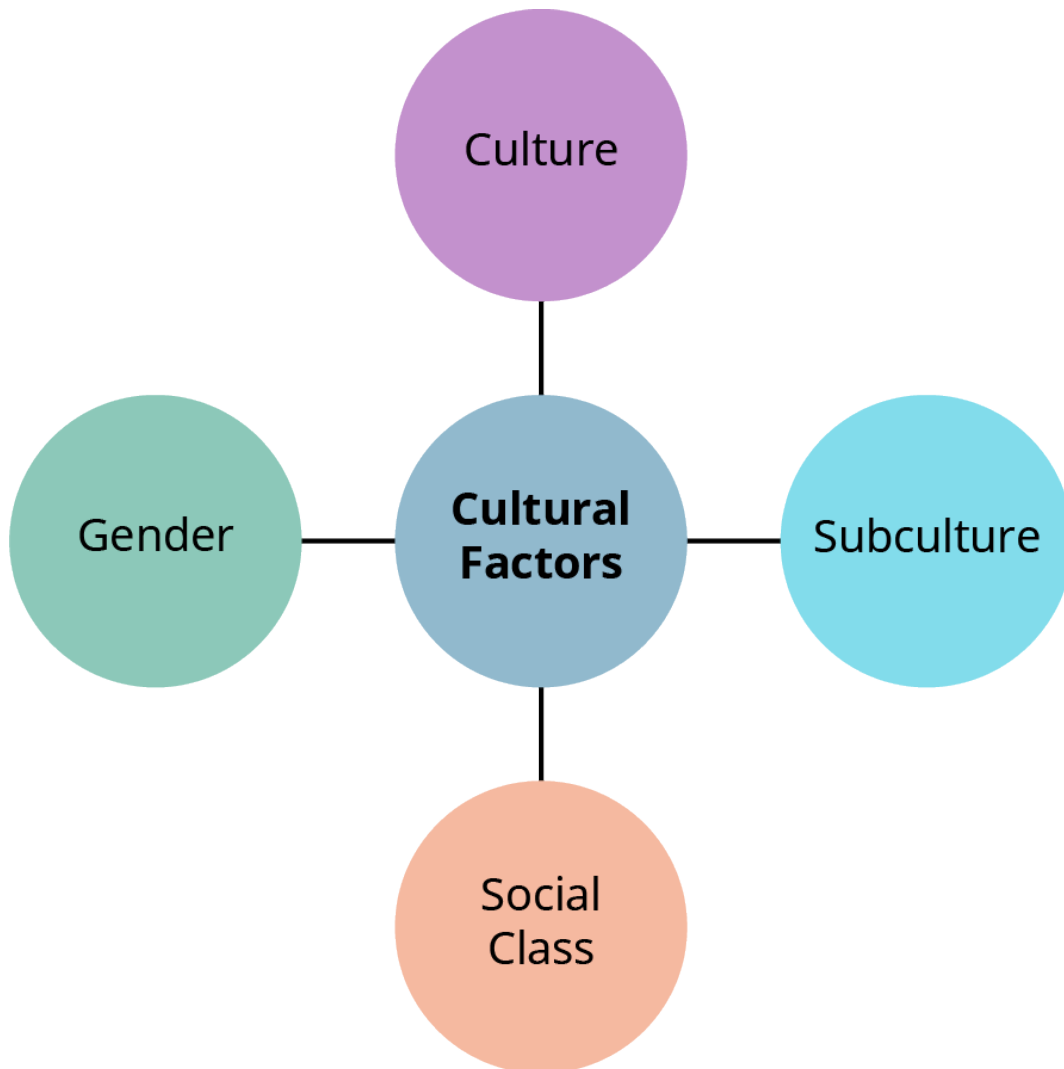
## Influences on Consumer Buying Behavior

### Cultural Influences

Why people buy isn't always a straightforward question. Think about the last time you bought a car, a bike, or other item. Why did you buy that specific make and model? Was it because its sleek style made you feel good about yourself? Perhaps you bought a particular brand because someone in your family bought the same brand. These are just a couple of examples of some of the factors that influence consumer buying behavior. Let's examine some others.

**Cultural factors** comprise a set of values or ideologies of a particular community or group of individuals. These can include culture, subcultures, social class, and gender as outlined below.

*Figure 7.3 Cultural factors include culture, subculture, social class, and gender. (attribution: Copyright Rice University, OpenStax, under CC BY 4.0 license)*



**Culture** refers to the values, ideas, and attitudes that are learned and shared among members of a group. Human behavior is largely learned. When you were a child, you learned basic values, perceptions, wants, and behaviors from your family and other external influences like the schools and churches you attended. Consider how these values and attitudes have shaped your buying behavior. For example, in a traditional Hindu wedding in India, a bride may wear red lehenga to the wedding, whereas Christian brides typically wear white. In India, widows are expected to wear white, whereas widows in the United States and other parts of the world generally wear more somber colors to a funeral.<sup>1</sup>

A **subculture** is a group of people, such as environmentalists or bodybuilders, who share a set of values. Ethnic and racial groups share the language, food, and culture of their heritage. Other subcultures, like the biker culture, which revolves around a dedication to motorcycles, are united by shared experiences. The Amish subculture is known for its conservative beliefs and reluctance

to adapt to modern technology. Think about what subculture(s) you may belong to and how they influence your buying behavior. For example, hip-hop music has long been associated with fashion, particularly sneakers. Run DMC's 1986 hit "My Adidas" led to the first endorsement deal between a fashion brand and a musical act, setting the stage for lucrative partnerships spanning the decades since—Master P with Converse, Jay-Z and 50 Cent with Reebok, Missy Elliott and Big Sean with Adidas, and Drake with Nike.

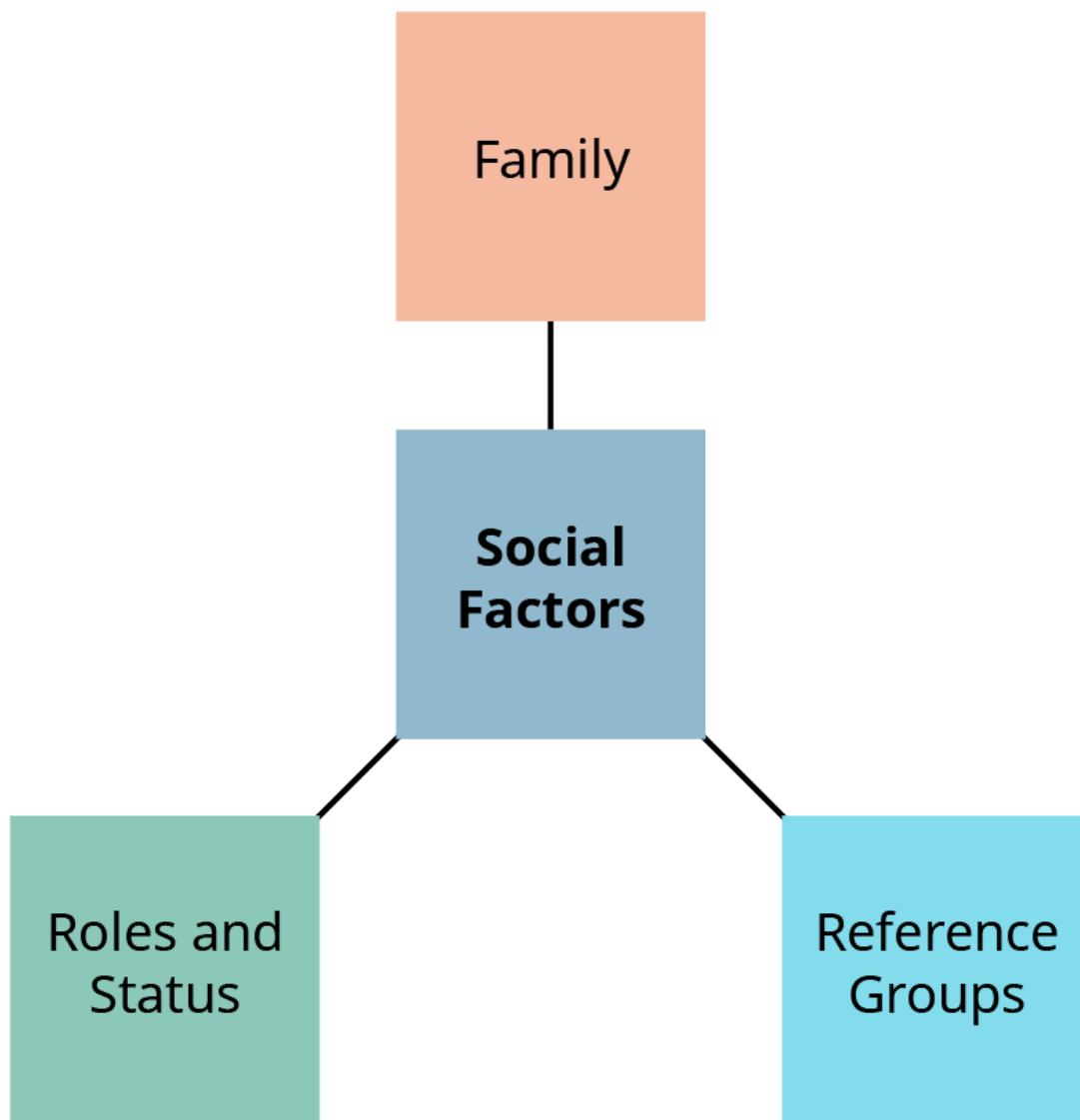
Your **social class** is also an important influence on your buying behavior. Sociologists base definitions of social class on several different factors, including income, occupation, and education. While there is disagreement on the number of social classes defined by income in the United States, many sociologists suggest five social classes: upper class, upper-middle class, lower-middle class, working class, and the economically disadvantaged.<sup>3</sup>

Income is largely defined by disposable income (the money you have left to spend or save after taxes are deducted), but its influence goes beyond just dollars, euros, yen, etc. For example, a lower-middle-class individual might focus primarily on price when considering a product, whereas an upper-middle-class person might consider product quality and features before price. However, you also can be influenced by a social class to which you don't belong but by which you want to be accepted. Have you ever spent money you really didn't have on brand name running shoes or a designer purse because that's what your friends have?

Finally, your **gender** plays an important role in your buying behavior. People of different genders not only want different products as a result of their upbringing and socialization, but they approach shopping itself with different motives, perspectives, and considerations. While it's always dangerous to stereotype, those who identify as male typically follow a utilitarian, more logic-based approach when shopping. They want a quick, effortless shopping experience. Those who identify as female, on the other hand, make decisions on a more emotional level. Zappos considers these different motives and provides different layouts on their landing pages for different genders. While the "male" version focuses on providing clear navigation by product categories, the "female" version aims to sell on emotion.<sup>2</sup>

## Social Factors That Influence Consumer Buying Behavior

Social factors are those factors that are prevalent in the society where the consumer lives. Every society is composed of individuals who have different preferences and behaviors, and these individuals influence the personal preferences of others in the society. Humans are social individuals, and the influences of people's family, reference groups, and roles and status have a huge impact on their buying behavior.



*Figure 7.4 Social factors that influence consumer purchasing behavior are family, reference groups, and roles and status.(attribution: Copyright Rice*

Let's first consider the influence of **family**. It is generally believed that most people pass through two families: a family of orientation (i.e., the family to which you were born or with whom you grew up) and a family of procreation (the family formed through marriage or cohabitation, including your spouse, partner, and/or children). Consider first the family of orientation. When you were growing up, whether or not you recognized it, you likely developed some degree of buying behavior through watching adult members of your household and probably tend to buy the same products or services as you grow older. Was your father a die-hard Chevy driver? If so, the chances are good that you'll probably at least consider buying a Chevy, too. Now consider the influence that your spouse, partner, and/or children have on your buying behavior. You may want that Chevy pickup because that's what your father drove, but your spouse or partner may subtly (or perhaps not so subtly) sway you toward

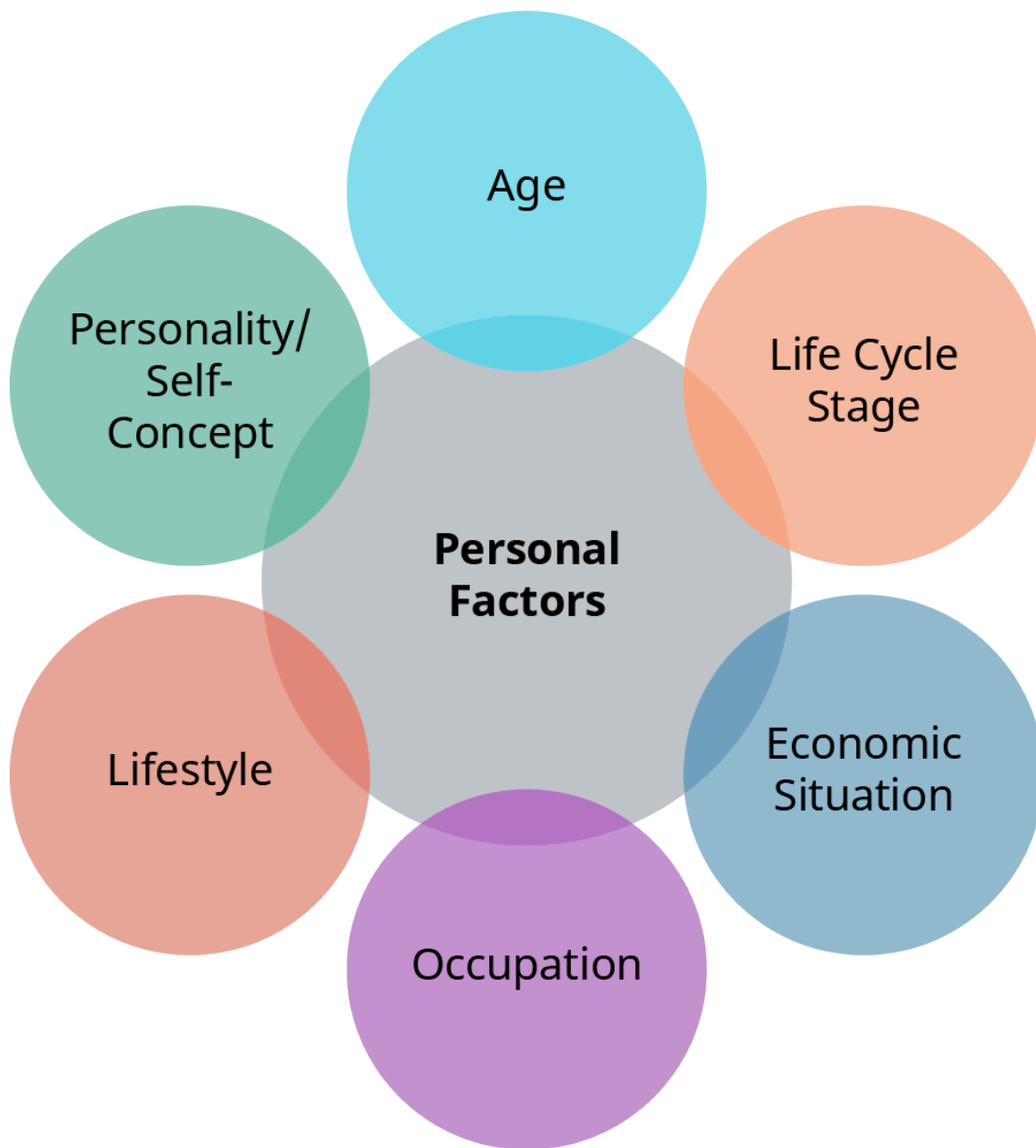
a Chevy crossover SUV because it's more practical with kids to transport to school, sports, and other activities.

**Reference groups** are those groups with which you like to be associated. These can be formal groups, such as members of a country club, church, or professional group, or informal groups of friends or acquaintances. These groups serve as role models and inspirations, and they influence what types of products you buy and which brands you choose. Reference groups are characterized by having opinion leaders—people who influence others. These opinion leaders aren't necessarily higher-income or better educated, but others view them as having more expertise in a particular area. For example, a teenage girl may look to the opinion leader in her reference group of friends for fashion guidance, or a college student might aspire to getting an advanced degree from the same university as an admired professor. Social media influencers also play a role here. Consider the influence that celebrities like Kendall Jenner (with more than 217 million Instagram followers)<sup>3</sup> or Leo Messi (with over 310 million Instagram followers)<sup>4</sup> have on individuals.

All people assume different roles and status depending upon the groups, clubs, family, or organizations to which they belong. For example, a working mother who is taking classes at the local community college assumes three roles at varying times—that of an employee, a mother, and a student. Her buying decisions will be influenced by each of these roles at different times. When she is shopping for clothing, her purchases may be influenced by any or all of these roles—professional attire for the office, casual clothes for classes, or yoga pants for home.

## Personal Factors That Impact Consumer Buying Behavior

Personal factors, such as your occupation, age and life cycle stage, economic situation, lifestyle, and personality and self-concept also play a major role in your buying behavior. Let's examine each of these in more detail.



*Figure 7.5 Personal factors that influence consumer purchasing behavior are age, life cycle stage, economic situation, occupation, lifestyle, and personality or self-concept. (attribution: Copyright Rice University, OpenStax, under CC BY 4.0 license)*

**Age** is a major factor that influences buying behavior because consumer needs and wants change with age. Your buying habits as a teenager or twentysomething are likely to be vastly different from your buying habits in middle age and beyond. Consider the four generational cohorts currently comprising the consumer market:

Likewise, your **life cycle stage** has a major influence on your buying habits. Consider the different buying choices you would make as a single person who is renting an apartment in an urban area versus the choices you would make as a homeowner in the suburbs with children. It should be noted, though, that age and life cycle stage can often be poor predictors of buying behavior. For example, some 40-year-olds are just starting their families, while others are sending their kids off to college. Still other 40-year-olds are single (or single again). Some 70-year-olds may fit the stereotype of a

retired person with a fixed income; others are still active or perhaps still working, with plenty of disposable income.

Your **economic situation** (income) is a huge influence on your buying behavior. Higher income typically means higher disposable income, and that disposable income gives consumers more opportunity to spend on high-end products. Conversely, lower-income and middle-income consumers spend most of their income on basic needs such as groceries and clothing.

Your **occupation** is also a significant factor in your buying behavior because you tend to purchase things that are appropriate to your profession. For instance, a blue-collar worker is less likely to buy professional attire like business suits, whereas attorneys, accountants, and other white-collar workers may favor suits or business casual work clothes. There are even companies that specialize in work clothes for certain types of workers, such as health care professionals who buy scrubs or construction workers who buy steel-toed boots.

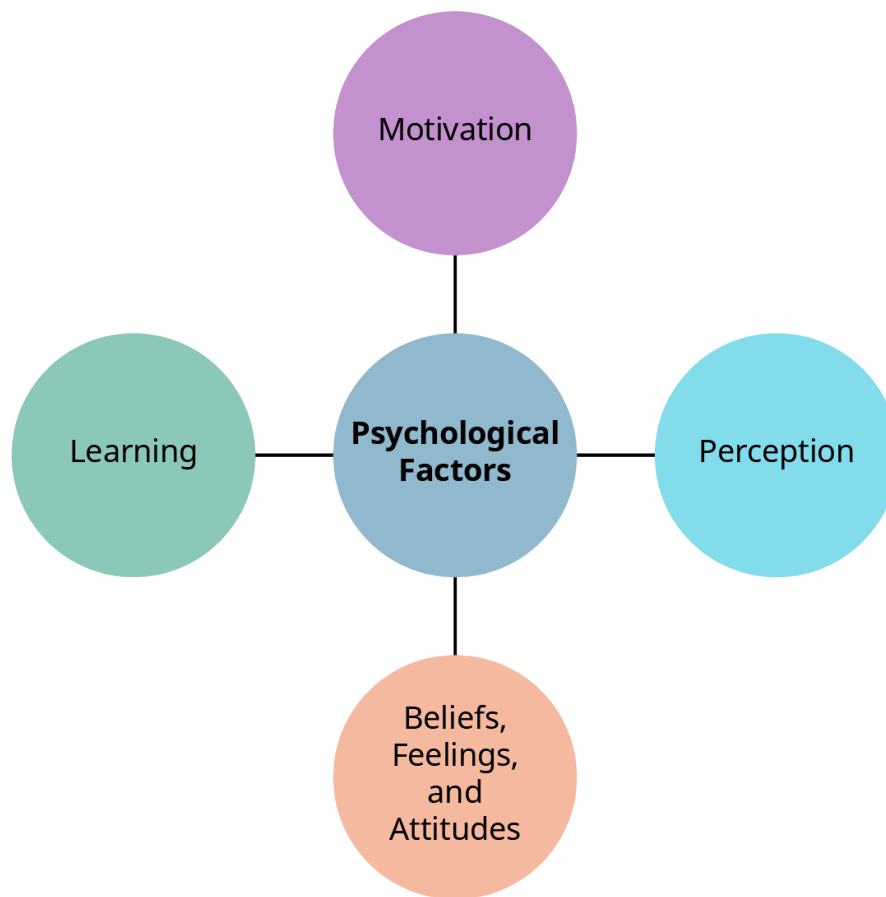
Your **lifestyle** reflects your attitudes and values. What do you consider to be your lifestyle? Do you strive to live an active, healthy lifestyle? If so, your purchasing decisions may focus on healthier food alternatives instead of fast food. Do you consider yourself to be a soccer parent? You may (perhaps reluctantly) forgo that sports car for a minivan to transport your kids to youth sporting events or other activities.

Your personality and self-concept are also important factors influencing your buying behavior. Personality is the characteristic patterns of thoughts, feelings, and behaviors that make a person unique. It's believed that personality arises from within the individual and remains fairly consistent throughout life.<sup>5</sup> Some examples of the many personality traits people might have include things like self-confidence, individualism, extroversion, introversion, aggression, or competitiveness. Your personality greatly influences what you buy as well as when and how you use or consume products and services.

Perhaps even more importantly, as consumers, people tend to buy not only products they need but also those products or services that they perceive as being consistent with their "self-concept." In other words, they generally want the products they buy to match or blend in with who they think they are.<sup>6</sup>

## Psychological Factors That Influence Consumer Buying Behavior

Your buying choices are further influenced by several major psychological factors, including motivation, perception, learning, feelings, beliefs, and attitudes.



*Figure 7.6 Psychological factors that influence consumer buying behavior are motivation, perception, learning, and beliefs, feelings, and attitudes. (attribution: Copyright Rice University, OpenStax, under CC BY 4.0 license)*

Let's first consider how motivation affects your buying behavior. Motivation is the process that initiates, guides, and maintains goal-oriented behaviors. It's the driving force behind your actions. One of the most widely known motivation theories is Maslow's hierarchy of needs.

Abraham Maslow asserted that all individuals have five needs, arranged from the most basic lower-level deficiency needs to the highest-level growth needs. As Figure 7.7 shows, physiological needs are at the most basic level and include things like adequate food, water, and shelter. Think about how marketers may try to appeal to consumers based on physiological needs. For example, Snickers ran a very successful ad campaign based on the slogan “You’re not you when you’re hungry.”

The second level is safety and security, the need to be safe from physical and psychological harm. Once again, consider just a few successful marketing campaigns that have focused on safety—“You’re in Good Hands with Allstate” and Lysol’s “Practice Healthy Habits” campaign with its tagline “What It Takes to Protect.”

The third level is belonging, or social needs. This level includes things like the need for emotional attachments, friendship, love, or belonging to community or church groups.

Esteem, the fourth level, includes such needs as recognition from others, taking pride in your education or work, awards, and/or prestige.

The highest level is self-actualization, which involves self-development and seeking challenges. For example, Nike’s “Find Your Greatness” campaign was intended to spark greatness in ordinary people, not just professional athletes.

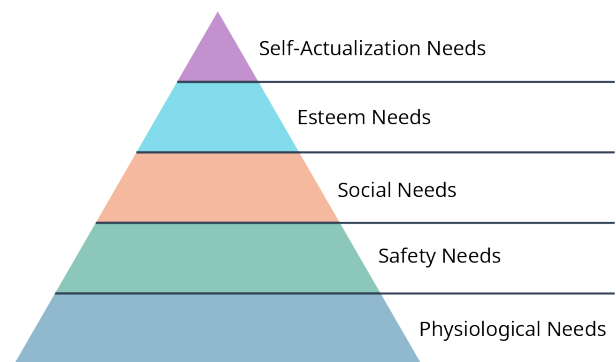


Figure 7.7 A pyramid shows Maslow's Hierarchy of Needs. Starting with the most basic at the bottom and moving up to the point of the pyramid, those needs are: physiological needs, safety needs, social needs, esteem needs, and self-actualization needs. (attribution: Copyright Rice University, OpenStax, under CC BY 4.0 license)

## Maslow's Needs Through a Customer Service Lens

Maslow's Hierarchy of Needs can be effectively applied in a customer service setting to better understand and address customer expectations at various levels. At the most basic level, **physiological needs** can be met by ensuring customer comfort and convenience. For example, in a restaurant, this could involve providing clean water, a comfortable temperature, and functional facilities, while in an online setting, it might mean offering a fast, user-friendly website or app. Moving up the hierarchy, **safety needs** are addressed by creating an environment where customers feel secure and confident. This includes offering clear refund policies, product guarantees, and secure payment systems, or emphasizing cleanliness and health protocols in industries like hospitality.

To meet **social needs**, customer service teams can foster connection and a sense of belonging by providing personalized interactions, such as remembering customer names or preferences, and

creating a welcoming atmosphere where customers feel valued. Programs like loyalty rewards or community events can further strengthen this bond. Addressing **esteem needs** involves making customers feel appreciated and important. This can be achieved through initiatives like VIP programs, exclusive offers, or simply acknowledging customer loyalty with personal thank-you messages. Positive reinforcement, such as compliments or recognition of good choices, also plays a key role.

Finally, **self-actualization** is about empowering customers to achieve their personal goals or aspirations. Businesses can help by offering products, services, or experiences that align with their customers' values or ambitions, such as eco-friendly options for sustainability-conscious individuals. Providing tailored guidance, educational resources, or unique experiences, like wellness programs or adventurous excursions, helps customers feel that their choices are meaningful. By understanding and applying Maslow's framework, customer service teams can move beyond merely solving problems to creating deeper, more satisfying connections with their customers, fostering loyalty and long-term engagement.

**Beliefs, feelings, and attitudes** also play an important role in consumer buying behavior. Beliefs are consumer perceptions of how a product or brand performs relative to different attributes. These beliefs are generally formed through personal experience, advertising, and conversations with others, and they play a vital role because they can be either positive or negative. You can even hold both positive and negative beliefs about the same thing. For example, you may believe that coffee is good for you because it helps you focus and stay alert, but you may also worry about the effect of coffee on your health and the way it stains your teeth. Human beliefs aren't always accurate and can change according to the situation.

Consumer attitudes are a composite of a consumer's beliefs, feelings, and behavioral intentions toward a product or service.

We've already talked about beliefs, so let's focus for a moment on affect, or feeling. Consumers often have certain feelings toward brands, products, or services. Sometimes these feelings are based on people's beliefs, such as a vegetarian who can't stand the thought of eating a hamburger, but you may also have feelings that are relatively independent of your beliefs. For example, someone who has strong environmentalist beliefs may object to clearing forests to make way for a housing development but may have positive feelings toward Christmas trees because they subconsciously associate these trees with the experience that they had at Christmas as a child.

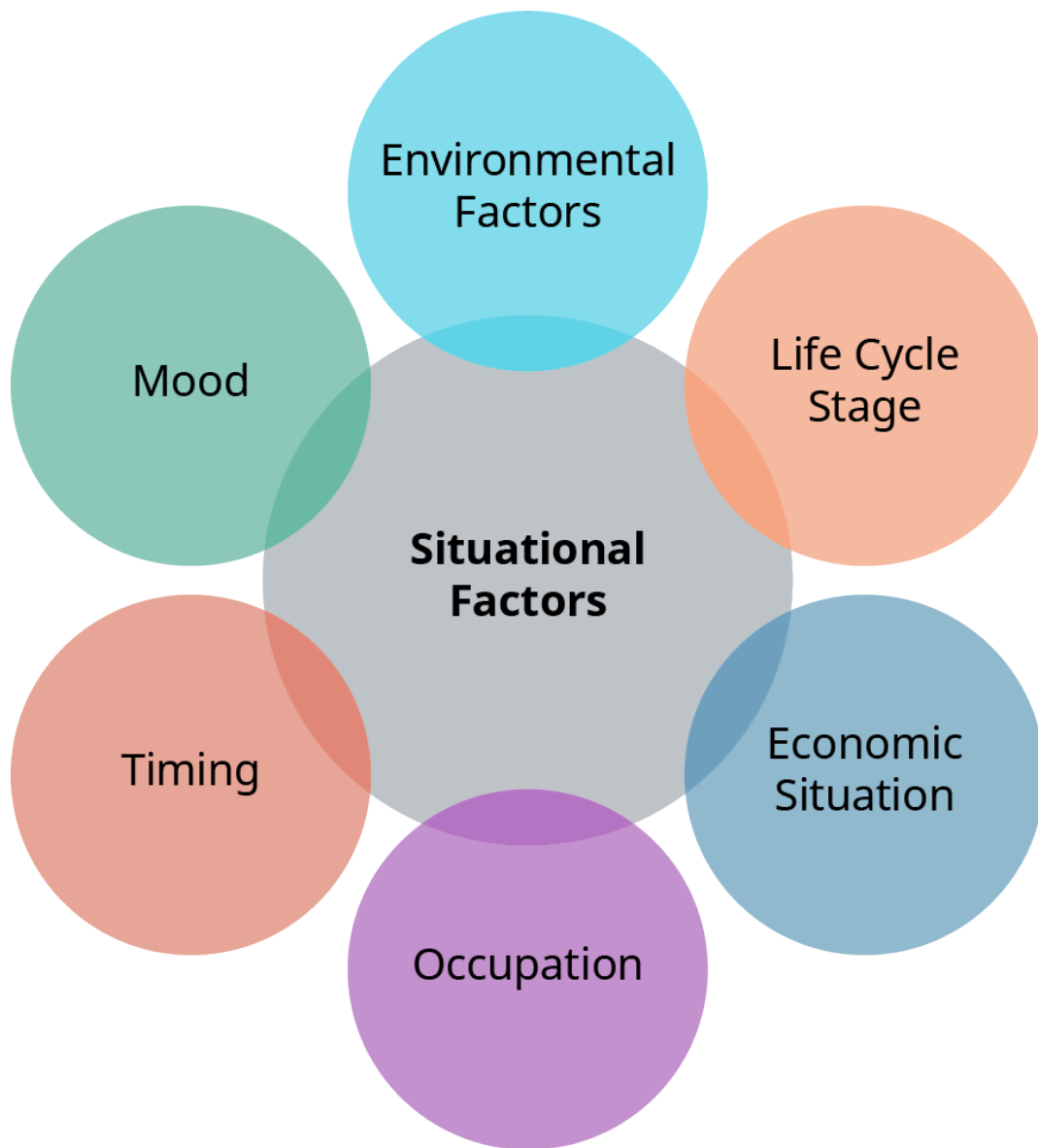
The behavioral intention aspect of an attitude is what you as a consumer plan to do—buy the brand or not buy the brand. As with affect, this is sometimes a logical consequence of your beliefs but may sometimes reflect other circumstances. Consider a consumer who doesn't particularly like a restaurant but will go there because it's an after-class gathering spot with her friends.<sup>7</sup>

Learning is still another important factor in consumer buying behavior. The fact is that consumer behavior is learned, and much of what you buy is based on your previous experiences with particular

brands. This is commonly known as the Law of Effect, which asserts that, if an action is followed by a pleasant consequence, you're likely to repeat it; if the action is followed by an unpleasant consequence, you're less likely to repeat it. For example, let's say you buy an Apple iPhone. If your experience with the iPhone is positive, you'll probably be more inclined to buy another Apple product when you're looking for a tablet or wearable. On the other hand, if you've had a not-so-positive experience with your iPhone, you're likely to look at other brands when considering purchasing other devices.

## **Situational Factors That Impact Consumer Buying Behavior**

Situational factors influencing consumers are external. These factors play an important role in how consumers experience a product and how these consumers' opinions are formed.



*Figure 7.8 Situational factors that affect consumer buying behavior are: environmental factors, life cycle stage, economic situation, occupation, timing, and mood. (attribution: Copyright Rice University, OpenStax, under CC BY 4.0 license)*

**Environmental factors** such as music, lighting, ambient noise, and even smells can either discourage or encourage a consumer's purchase decision. For example, researchers conducted a study on the effect of lighting on consumer purchases in a grocery store. They lit half the store with traditional fluorescent lighting and the other half of the building with LED lighting. Researchers conducted the study over 21 weeks and discovered that consumers bought 25 percent more products on the LED-lit side of the store.<sup>8</sup>

Spatial factors also play a role. The way a product is displayed may make it seem desirable, but a crowded store or a long line at the cash register can suddenly make that same product seem less desirable. Think about it: Have you ever seen a long line to check out at the cash register and put the

product you intended to buy back on the shelf because it simply wasn't worth it to waste your time standing in line?

The **social situation** of shopping is another situational factor. Did you know that you're more likely to stop to look at certain products when you're in the company of a friend as opposed to a parent? The social aspect can even alter the price you're willing to pay. You might be more inclined to purchase a more expensive product when you're with a colleague or potential partner than you would if you're with a friend or spouse.<sup>9</sup>

The goal of your shopping trip is yet another situational factor. If you go to a store to look for a birthday present for your mother, your purpose is totally different than if you're casually shopping for a new pair of shoes. The reason for shopping dictates the kinds of products customers are willing to interact with at that time and may cause them to bypass certain products they would normally interact with on another shopping trip. This is even true at the grocery store. You'll interact with products differently if you're on your weekly shopping trip versus simply going into the store because you're out of milk.

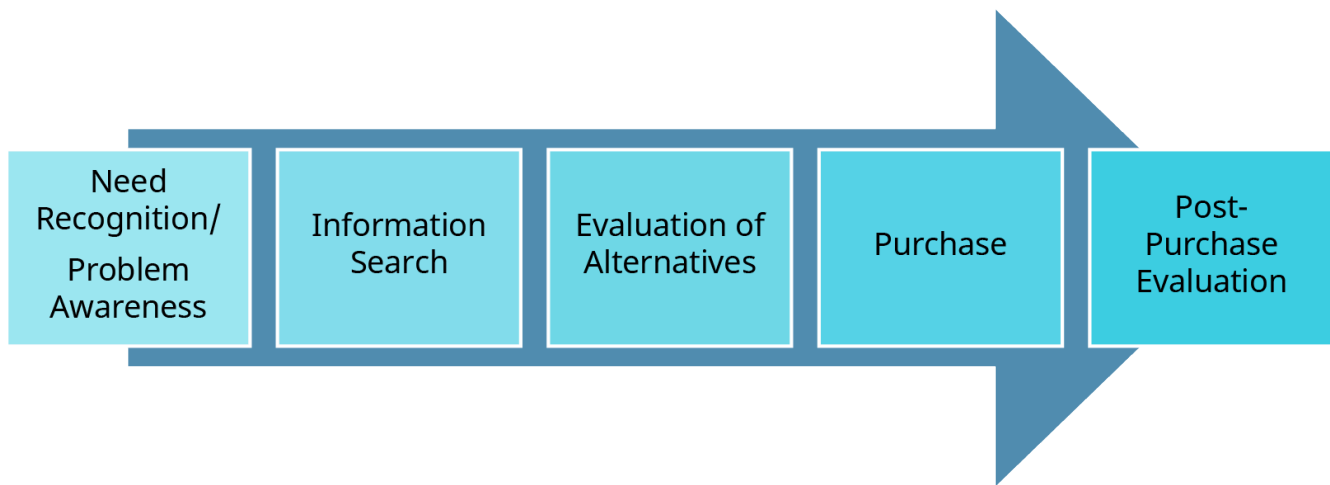
Much like the purpose of your shopping trip, **timing** also influences your consumer behavior. If you're in a rush because it's Christmas Eve and you haven't bought a present for your best friend yet, you'll interact with fewer products than if you have hours to shop. Even if two people are looking for the same type of product, the one in a rush will probably end up with the most accessible product, whereas the leisurely consumer has time to weigh the price and quality of offerings.

Finally, your **mood** influences your buying behavior. Someone who is feeling sad or stressed interacts differently with products than a happy, relaxed shopper. The same can be said for someone who's fatigued versus someone who's full of energy.

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## Consumer Decision Process

This chapter has examined many of the factors that influence consumer buying behavior, but behind the visible act of making a purchase lies an important decision process that takes place before, during, and after the purchase of a product or service.



*Figure 7.9 The five stages of the consumer decision-making process are overlaid on an arrow pointing to the right. Starting at the left, those stages are: need recognition or problem awareness, information search, evaluation of alternatives, purchase, and post-purchase evaluation. (attribution: Copyright Rice University, OpenStax, under CC BY 4.0 license)*

A buyer passes through five stages of the consumer decision process when making choices about which products or services to buy. Let's examine each, starting at the beginning.

## Stage 1: Need Recognition

The buying process starts when you sense a difference between your actual state and your desired state. This is referred to as problem awareness or need recognition. You might become aware of a need through internal stimuli (such as feeling hungry or thirsty when you're on a long road trip) or external stimuli (such as passing a bakery and smelling the wonderful aroma of cookies baking).

Sometimes recognizing the problem or need is easy. You've run out of toilet paper or milk. But other times recognizing the problem or issue is more complicated. For example, think about this first stage in terms of your decision to enroll in college. What was the stimulus that triggered your interest in attending college? Are you a working adult who has recognized that upward advancement in your company won't happen without possessing a college degree? Have you long aspired to be an entrepreneur, and you wanted to get some business and marketing courses under your belt so that you're better prepared for the challenges of entrepreneurship? Perhaps a career in marketing has been on your internal radar since high school, and you've decided to take the plunge and get your degree in marketing. Or perhaps, after graduating from high school, your parents gave you an ultimatum—either find a job or enroll in college.

## Stage 2: Information Search

Now that you've identified the problem or need, you'll be inclined to search for more information. There are two different search states. The milder search state is called "heightened attention," in which you become more receptive to information about the product or service. The stronger search state is called "active information search," in which you might do some research about the product or service on the Internet (referred to as an internal search), ask friends and/or family members their opinions (what's known as an external search), or even visit stores to view and touch the product (called an experiential search).

Keep in mind, of course, that not all needs/problems identified in Stage 1 will require this second stage. If you've run out of bread or toilet paper, you're probably not going to do an information search; rather, you'll just go to the store to buy what you need, and your information search may be as simple as checking prices at the grocery store to see if your favorite brand is available or another brand is on sale. However, purchase decisions of more consequence will usually trigger an information search of some type.

Again, consider the process you went through in deciding which college to attend. What sources of information did you use to find out about the colleges or universities you considered attending? Did you look at their websites, talk with friends or family who attended that school, or perhaps even visit the campus and meet with an admissions counselor?

## Stage 3: Evaluation of Alternatives

Consumers are said to view a product or service as a "bundle of product attributes," and you evaluate several attributes of a product or service in reaching your purchase decision. For example, if you're buying a smartphone, you'll consider factors such as battery life, speed, storage capacity, or price. If you're booking a hotel, you'll probably consider its location, cleanliness, free Wi-Fi, whether it has a free breakfast in the morning or a pool, and of course price.

What bundle of attributes did you use when evaluating your college alternatives? You may have considered factors such as location, size of the campus, whether the school had the program of study you wanted, if it had online learning, and cost.

## Stage 4: Purchase Decision

This stage involves actually reaching a decision on the purchase of the product or service. One way people navigate all the information, evaluations, and choices in their purchase decision is to use heuristics—mental shortcuts or "rules of thumb." Heuristics are types of preexisting value judgments that people use to make decisions.

For example, do you believe that the more expensive product is always of higher quality than the lower-priced product? That's known as the price = quality heuristic. Brand loyalty is another heuristic people use in reaching their purchase decisions. For example, do you eat cereal? Do you always buy the same brand, or do you buy whatever's on sale or a brand for which you have a coupon? Country of origin is still another heuristic. Given a choice, do you prefer to buy products made in the United States versus products made in other countries?

How did you make your purchase decision to enroll in your college or university? What heuristics did you use?

## Stage 5: Post-Purchase Evaluation

After purchasing the product or service, you'll experience either satisfaction or dissatisfaction. You may have second thoughts after making a purchase decision, and these doubts lead to cognitive dissonance, or buyer's remorse—tension caused by uncertainty about the correctness of your decision. This may lead you to search for additional information to confirm the wisdom of your decision in order to reduce that tension.

What determines if a consumer is very satisfied, somewhat satisfied, or dissatisfied with his or her purchase? Satisfaction is a function of the closeness between the buyer's expectations and the product's perceived performance. If the product's performance falls short of expectations, you'll be dissatisfied. If the product's performance meets your expectations, you'll be satisfied, and if the product's performance exceeds your expectations, you'll be very satisfied.

Think about the purchase decision you made when you decided to enroll in your college or university. Are you very satisfied, satisfied, or dissatisfied with your decision?

### The Consumer Buying Process from a Customer-Service Perspective

The five stages of the consumer buying process—need recognition, information search, evaluation of alternatives, purchase, and post-purchase evaluation—can be effectively applied in customer service to enhance the customer experience at every step.

The process begins with **need recognition or problem awareness**, where customer service teams play a vital role in helping customers identify their needs or address problems. For instance, service representatives can ask probing questions to uncover customer pain points or provide personalized recommendations based on observed or stated preferences. This stage is about being attentive and empathetic to ensure the customer feels understood and supported.

During the **information search** stage, customers are gathering data about possible solutions. Here,

customer service can assist by providing clear, accurate, and accessible information. This could include sharing product details, explaining features and benefits, or directing customers to helpful resources such as FAQs, tutorials, or expert consultations. Transparency and responsiveness are crucial to building trust during this stage.

In the **evaluation of alternatives** stage, customers are comparing options to make a decision. Customer service can guide this process by highlighting unique selling points, offering side-by-side comparisons, and addressing any doubts or concerns the customer might have. Personalized suggestions and testimonials from other satisfied customers can also help differentiate the company's offerings from competitors.

The **purchase** stage is the moment of decision, and customer service can ensure this experience is smooth and enjoyable. This includes assisting with technical issues during checkout, answering last-minute questions, or even offering incentives such as discounts or loyalty rewards to nudge the customer toward completing their purchase. A seamless and supportive purchase process can leave a positive impression that builds loyalty.

Finally, **post-purchase evaluation** is where customer service truly shines in reinforcing satisfaction and fostering long-term relationships. Follow-up actions such as checking in to ensure the customer is happy with their purchase, providing instructions or support for using the product, and addressing any issues quickly and effectively show the customer that their satisfaction matters. Encouraging feedback and reviews, offering ongoing assistance, and demonstrating appreciation through thank-you messages or rewards for repeat business can turn one-time buyers into loyal advocates.

By aligning customer service practices with the five stages of the consumer buying process, businesses can create a cohesive and satisfying experience that meets customer needs at every step of their journey, driving both immediate and long-term success.

# Customer Journey Mapping

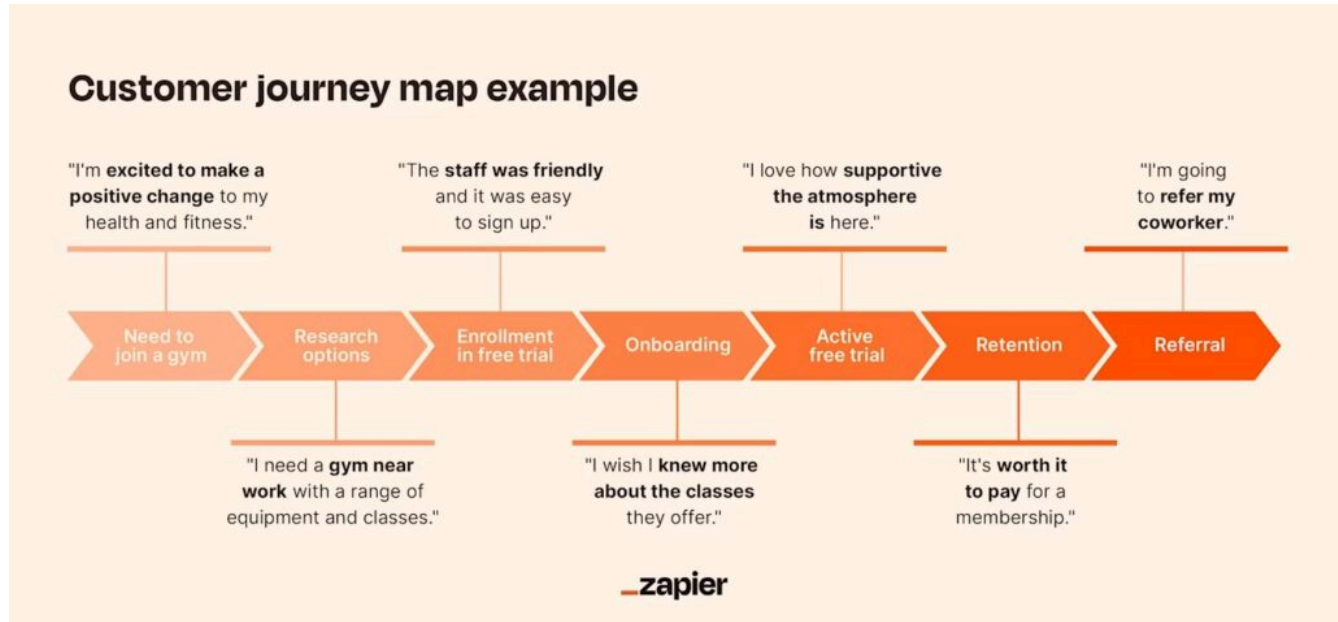


Figure 3.10 This map shows the linear journey the customer takes after deciding to join a gym.

## What is a Customer Journey Map?

In our customer-centric world, providing a superior customer experience (CX) is a priority for any organization pursuing real success. Today's organizations are doing everything they can to better understand their customers. Whether your brand is business-to-business (B2B) or business-to-consumer (B2C); a start-up or corporation; global or local, providing exceptional customer experience is a must. One of the best ways to get to know your target audience is by walking in their shoes and mapping each and every interaction you share. This is where the customer journey map comes in.

A **customer journey map** is a visualization of an end-to-end customer experience. It's essentially a visual narrative that allows you to understand each process your customer encounters with your organization, spanning each step from their initial engagement to, hopefully, a long-term relationship. As Matthew Fairweather, director of Matthew Fairweather Ltd., has stated:

*Customer journey mapping is really a mixture of art and insight ... But that's just a visual aid. The real work in journey mapping is using all of the customer information and data available to you from across the business and delivering a process and structure to their experience.*

A great customer journey map should highlight how your customers discover, research, purchase, interact, and even promote your offerings. One of the easiest places to start is by outlining all the **touchpoints** your organization has with its target audience. In the graphic below, the touchpoints

are listed in the boxes and represent customer interactions as they move through each of the stages. And, as you can see, these touchpoints can be either online or offline.

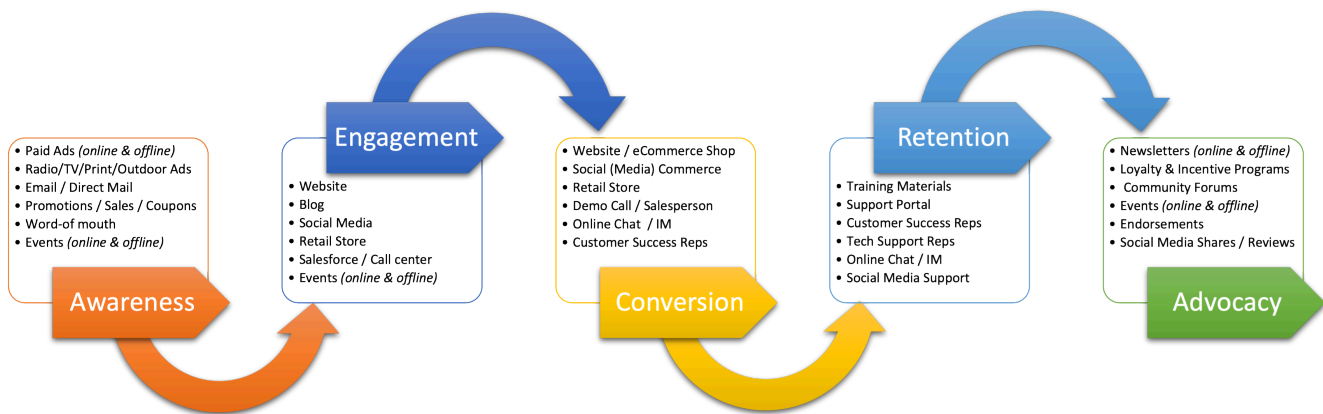


Figure 3.11 Customer touchpoints occur when a prospective customer becomes aware of your company, then engages with your website and social media, speaks with employees, makes an initial purchase, returns for a future purchase, and then becomes an advocate for your products and services. (Source: Customer Journey Mapping 101, Zapier.com)

Simply stated, a customer journey usually includes the following five stages:

- **Awareness**

A prospective customer learns about an organization, product, or service. In this initial stage, marketers create awareness through ads, events, articles, or other content

- **Engagement**

A relationship develops between the prospective customer and the organization via several, positive interactions. This is achieved by nurturing leads with targeted content, e.g., on social media, through email marketing, or other events / owned media.

- **Conversion**

The prospective customer decides to buy a product or service from the organization. By presenting a unique value proposition and creating a sense of urgency, e.g., special offers, marketers can help prospective customers convert.

- **Retention**

The customer has a strong and loyal relationship with the organization and becomes a regular customer or active user. While often the domain of customer support or customer success, marketers can assist by providing the appropriate training materials, support, and resources to ensure customers are satisfied and stay.

- **Advocacy**

A regular customer is satisfied with the organization's products and/or services and recommends them to others. To create advocates, organizations must deliver compelling experiences worthy of sharing. To support these experiences, marketers can provide ready-to-share content.

Please note that depending on your organization, you may choose to rename some of the stages from above or perhaps even break up a stage into multiple stages. For example, if you are in HR and mapping the "customer journey" for recruiting new employees, "Conversion" could be changed to "Application Submitted" and "Engagement" might be broken up into First interview, Second Interview, etc. So, feel free to tweak the *specific* names and number of stages to best fit your organizational processes. But do make sure that you are capturing all the steps in your target audience's journey.

In addition to specific stages and touchpoints, a great customer journey map also includes additional information and details. Here are six more areas to consider when building a comprehensive customer journey map:

1. **Customer's Perspective**

When you build your customer journey map, ensure that you are mapping and presenting everything truly from the customer's perspective. This is a great opportunity to use the **customer personas** that you have created to closely map out their customer journeys. Organize the stages to reflect the conversion process from your customer's (or customer persona's) perspective, as opposed to your own internal processes. This can often include aspects out of your direct control, such as social media influences, web searches, and steps your customers take even before you enter the picture.

2. **Customer's Thoughts, Emotions, Pain Points, and Goals**

For every stage of your customer journey map, write out what your customers are thinking, contemplating, feeling (even fearing), struggling with, and what they hope to accomplish. This will help you, as an organization, meet and address those specific needs. Here are a few examples:

1. **Customer Thoughts**

Customer thoughts represent what customers are thinking at a specific stage of their customer journey. Examples include:

1. I hope I can find \_\_\_\_?
2. Is this organization credible?
3. How do I use \_\_\_\_?
4. Is there support post-purchase?
5. How does \_\_\_\_ compare to other offerings in the market?
6. How much does it cost?
7. How long will it take to get it?

2. **Customer Feelings**

Customer feelings reflect what customers might be feeling at a specific stage of their customer journey. Examples include:

1. Excited – often at the beginning when a “solution” is a possibility
2. Curious – usually at some point when doing research or trying to find out more information
3. Confused – for complex or complicated products / services
4. Hopeful – perhaps after purchase, but before using the product / service
5. Impressed – post-purchase
6. Frustrated – when things go wrong
7. Overwhelmed – too much information

*(For visualization purposes, emotions are sometimes represented by emojis.)*

### 3. Customer Pain Points

Customer pain points are specific problems that prospective or existing customers are experiencing at a specific stage in their customer journey. Examples include:

1. \_\_\_ takes too much time. (process pain point)
2. \_\_\_ is too complex and I don't understand how to use it. (product/service pain point)
3. I can't find the information I need. (accessibility pain point)
4. I can't connect with the appropriate person. (support pain point)
5. It's too expensive. (financial pain point)

### 4. Customer Goals

Customer goals highlight what a customer is looking to accomplish at a specific stage of their customer journey. Examples include:

1. I want to find out how much it costs.
2. I want to solve “this” problem.
3. I want to learn about \_\_\_\_.
4. I want to buy \_\_\_\_

### 3. Customer Activities

What does the customer actually do at every step along the customer journey?

### 4. Content

As you review each stage of your customer journey, think about what content (articles, FAQs, video, white papers, videos, training materials, etc.) you need to provide to address the customer's issues.

### 5. Time

The length of a customer experience provides important context. Does a typical stage last minutes, days, weeks, or months? How long does your customer remain in a specific stage? A great journey map recognizes that this information is essential and takes time into consideration.

## 6. Key Performance Indicators (KPIs) / Data Collected

At each stage, the organization should think about what data it will collect, measure, evaluate. What are the key performance indicators (KPIs) that show the organization is performing well (or not) in meeting the target audience's needs at that **specific** stage? Often organizations will focus on high-level KPIs and outcomes, but by creating KPIs for each stage, an organization can better identify where in the customer journey things are either performing well or not.

## 7. Opportunities

Once mapped out, where are the gaps and the possibilities? The main purpose of any customer journey map is to improve your customers' experiences and satisfaction. Given all of the above considerations, where is there room for improvement or new opportunities?

If you want to see some very good, visual examples, please read the following articles, **Nine Sample Customer Journey Maps – And What We Can Learn from Them** and **144 Best Customer Journey Map Templates and Examples**.

Hopefully, you now have a better understanding of customer journeys. To better complete your customer personas and customer journeys, you will need to collect and analyze lots of data about your customers. This customer research is **critical** to the accuracy, precision, and validity of these tools. While the goal of these tools is to improve the customer experience and to make better customer-focused decisions, if the underlying data is not appropriate, recent, and/or accurate, your entire analysis may be flawed. So, if you are planning to use customer personas and customer journey maps as a strategic, decision-making tool, do make sure you have the appropriate data to support it.

Here is a YouTube video, **Customer Journey Map Workshop**, that does a nice job explaining how data, customer personas, and customer journeys work together. Closed captioning is available on YouTube.



*One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=439#oembed-2>*

## Benefits of a Mapped Customer Journey

Now that you have a more detailed understanding of what a customer journey is and how to track customers as they move through their customer journeys, let's talk about **why** you should map the customer journey:

- **Consistency of touchpoints across the entire organization**

Similar to the customer persona, customer journeys are a valuable tool in understanding your customers and the various touch points across the **entire** organization. Customer journeys provide a holistic view of your customers and also highlight how the various departments and teams can work together to create a more seamless customer experience. Furthermore, organizations can use a customer journey to ensure consistency across the entire customer journey and a more consistent customer experience.

- **Deeper understanding of customers**

As mentioned previously, your customer journey should include your customer needs, wants, pain points, and preferences at each specific stage of the journey. By identifying these characteristics, organizations can better provide support, content, and services to address these very needs, wants, pain points, and preferences.

- **Closer and stronger customer relationships**

Organizations with detailed customer journeys tend to develop closer and more meaningful customer relationships because they know exactly what customers need, when they need it, and where / how they need it. This level of personalization and customer care translates into more loyal customers and ones that often turn into brand advocates.

- **Tailored and timely communications**

From a marketing communications perspective, knowing what to communicate, when to communicate it, and through which specific channels ensures that marketers are optimizing their return on marketing activities and investments. These activities deliver more personalized and targeted messaging, which can resonate more with target audiences and customer personas.

- **More targeted product development**

As we mentioned, customer journeys are also a great tool in identifying product or service development opportunities. For these development teams, customer journeys can identify areas where an organization might introduce new products and/or new ways to improve existing products and services to better serve your target audiences. In other words, customer journeys are not just about marketing but about the overarching organizational customer experience.

- **Improved identification of cross and up-selling opportunities**

From a sales perspective, customer journey maps identify those opportunities to create cross and up-selling opportunities that are complementary. Remember that this should not be the sole focus of your customer journey. However, there are times when complementary products or services will significantly improve the customer experience. Customer journey maps can serve as strategic tools in uncovering these opportunities.

# Customer Journey Optimization

While customer journey maps are helpful in identifying new opportunities, they also allow organizations to quickly identify areas to optimize and/or automate processes or communications based on the data. In building your customer journey maps, it is critical to think about the key data that you will collect along the journey and how that data can help in making better organizational decisions. In other words, your customer journey map should always include the key data and analytics that you plan to collect and evaluate at each stage of your journey. By closely analyzing customer journey data, organizations can better assess how customers move from one touchpoint to another and how to make incremental improvements to the customer journey and customer experience.

## *Key Takeaways*

This chapter defined consumer markets and consumer buying behavior and discussed the buyer's black box, the concept that attempts to mark the pattern consumers follow when making a purchase decision. It also categorized consumer buying behavior into four types: complex buying behavior, dissonance-reducing buying behavior, habitual buying behavior, and variety-seeking buying behavior.

This chapter also looked at the cultural, social, personal, psychological, and situational factors that influence consumer behavior and scrutinized the stages of the consumer decision process.

Finally, a customer journey map is both a discovery and strategic organizational tool. In developing a customer journey map, organizations may discover areas that need improvement or can be supported better. However, a customer journey map can also be used to prioritize which target audiences to pursue or serve better.

## Notes

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# Chapter 8: Customer Types & Behavior Styles

## Customer Types & Behavioral Styles: Overview

This chapter introduces students to the concept of customer types and behavior styles, exploring how individual preferences, communication styles, and personalities influence customer interactions. You will learn to categorize customers, adapt their service approach, and create customer personas to understand diverse customer needs better.

### *Learning Objectives*

After reviewing this information, you should be able to do the following:

- Describe the Social Style Matrix and its dimensions of assertiveness and responsiveness.
- Identify and differentiate between the four social styles: Analytical, Driver, Amiable, and Expressive.
- Explain the impact of introversion and extroversion on customer behavior and communication preferences.
- Distinguish between emotional and logical decision-making styles and their influence on purchasing behavior.
- Categorize customers into different types, such as first-time customers, loyal customers, impulse buyers, and discount shoppers.
- Demonstrate strategies to effectively engage with and adapt service approaches for different customer types.
- Recognize the importance of internal customers and their role in delivering exceptional customer service.
- Develop customer personas using data-driven insights to better understand and engage with target audiences.

## Common Behavior Styles

Understanding the social style matrix provides insight to customer service and engagement as

you adjust your communications to meet the social style of your customer. What makes people so different in their style, perceptions, and approaches to things is defined in the social style matrix. The social style matrix is based on patterns of communication behavior identified by David Merrill and Roger Reid back in 1999. It plots social behaviour based on two dimensions: assertiveness and responsiveness. In the matrix below, the x axis is assertiveness, which indicates the degree to which a person wants to dominate or want something from someone else (control the conversation or insist on a sale for example). The y axis represents responsiveness, which is how a person responds to requests or demands (how quickly you follow-up, for example) and is considered the sociability axis.<sup>1</sup>

In Figure 8.1, the Social Style Matrix, you can see the four quadrants; each quadrant represents one of four social styles: analytical, driver, amiable, and expressive.

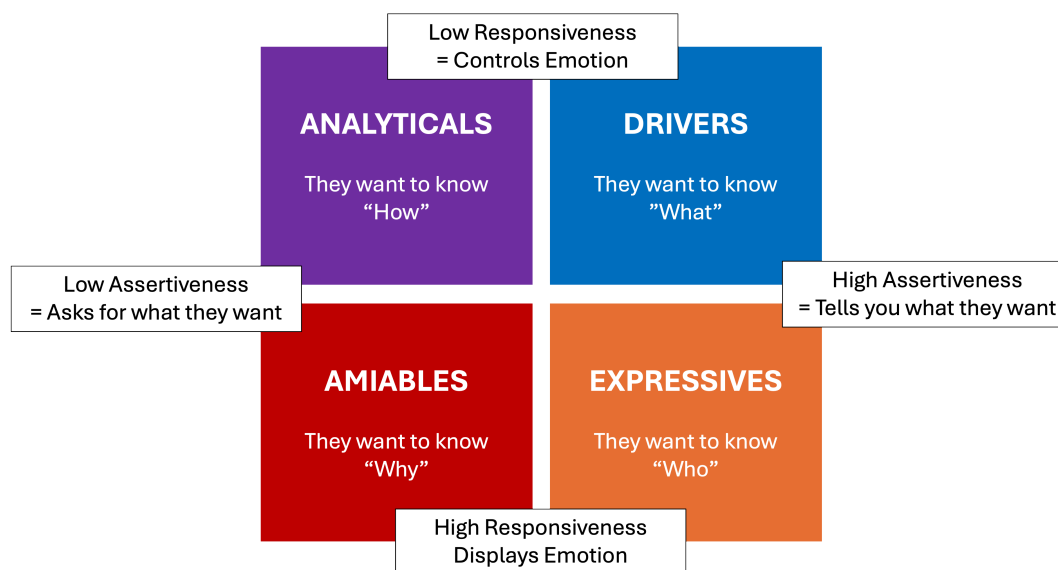


Figure 8.1 Adapted from David Merrill & Roger Reid – Social Styles

Each of the social styles has specific characteristics that are important to keep in mind as you prepare and present your sales presentation. The model “demonstrates that each of the four social styles has positives and negatives associated with their behavior. Versatility is the true power of social style. It is the ability to leverage the strengths of your own Style while recognizing and responding effectively to others’ unique Styles. It allows you to create meaningful and productive relationships with people of any Style whether they’re like you or not”.<sup>2</sup>

## Analyticals: They Want to Know “How”

Do you know someone who only wants the facts to make a decision? Perhaps it is your father or

mother or a professor. **Analyticals** are all about the facts. They are defined by low responsiveness and low assertiveness. In other words, they like to hear about the pros and cons and all the details before they decide. They want to hear about the tangible results, timelines, and details before they make a decision. In fact, they are the ones who will actually read the directions before they put together a new grill or set up a wireless home network. People with an Analytical Style are typically described by others as quiet, logical and sometimes reserved or cautious.<sup>3</sup> You might have some visual cues that will help you identify an analytical. They probably dress conservatively and have their achievement awards proudly displayed on their office wall. They are organized and focused on work activities.<sup>4</sup>

If you are working with a customer who is an analytical, they will ask you very specific questions about all the details, and they will respond positively if you make them feel as if they are right. In other words, do not challenge their facts and point of view. Rather, provide history, data, financial details, and other facts in an organized, structured format. They will ask many questions so that they clearly understands the product or service. Since it is important for them to make the right decision, they will take the time to gather all the facts. Because they put so much effort into making the right decision, they tend to be loyal to the people from whom they buy, believing they do not need to reevaluate the same facts.

Adapt your style to an analytical by focusing on the “how.” Slow down your presentation and let them take it all in; do not make them feel rushed. Use facts, historical data, and details to be sure they have all the information they need to make the decision. Use guarantees or warranties to reduce any perceived risk.

## Drivers: They Want to Know “What”

You’ve probably watched Super Bowl champion Peyton Manning, former quarterback for the Indianapolis Colts play football on television or the Internet. One of the traits that makes him a champion is the fact that he is focused exclusively on winning each game. When he is on the field, everything else is in second place in his mind. Peyton Manning is a **driver**.

Drivers have some characteristics that are the same as analyticals in that they like to have all the facts to make their decision. However, drivers are different from analyticals because they make decisions quickly. On the social style matrix, they are in the low responsiveness, high assertiveness quadrant. “People with a Driving Style are seen by others as direct, active, forceful and determined. They initiate social interaction and they focus their efforts and the efforts of others on the goals and objectives they wish to get accomplished”.<sup>5</sup> They have little regard for the opinions of others; a driver is rarely described as a “people person. Unlike analyticals, they don’t want facts just for the sake of having them; they want relevant information that will help them decide quickly.

Like the analyticals, drivers dress conservatively and display their achievement awards on the wall of their office. A calendar is usually prominent to keep focus on how long it will take to achieve something.

The best way to adapt to a driver is to be professional and to the point. Do not spend too much time on small talk; get to the point quickly. Provide options so that they can feel as if they are in control. Include a timeline so they can see how quickly they can get results.

## Amiables: They Want to Know “Why”

Actress Reese Witherspoon was named the Honorary Chairperson of the Avon Foundation for Women because of her ability to unite women around the cause of breast cancer.<sup>6</sup> She rallies people and brings them together by focusing on the greater good, but she does not assert herself. She is an **amiable**.

“People with an Amiable Style openly display their feelings to others. They appear less demanding and generally more agreeable than others do. They are interested in achieving a rapport with others who often describe them as informal, casual and easy going”.<sup>7</sup> An amiable is most likely to be described as a “people person.” Amiables are team players who focus on innovation and long-term problem-solving. They are less controlling than drivers and more people-oriented than analytics because they are in the low assertiveness, high responsiveness quadrant of the matrix.

Amiables provide some visual clues because they are typically open and friendly. If you are meeting with them at home or in their office, you’ll find they often display pictures of family, and prefer to work in an open environment rather than sitting across the desk from you. They tend to have a personal style in their dress, being casual or less conservative than analytics or drivers.<sup>8</sup> When you are working with an amiable customer, establish a personal relationship. They will be more likely to discuss issues with you. When you demonstrate your personal commitment, they will be open to doing business with you.

## Expressives: They Want to Know “Who”

An **expressive** is intuitive, charismatic, persuasive, nurturing, and engaging. Oprah Winfrey is an expressive; she has excellent rapport with people, even people she has never met. Relationships are important to her, but only to help her achieve her higher goal of giving her viewers inspiration and a better way to live their lives.

Expressives are creative and can see the big picture clearly; they have a vision and use their style to communicate it and inspire people. They are not caught up in the day-to-day details. “People with an Expressive Style tend to be more willing to make their feelings known to others. They can appear to react impulsively and openly show both positive and negative feelings. They are typically described by others as personable, talkative and sometimes opinionated.”<sup>9</sup> Expressives build relationships to gain power, so people like employees, viewers, or voters are very important to them as well as status and recognition.

Since expressives are not big on details, you might find their offices to be a bit disorganized, even

cluttered and messy. Their offices are set up in an open format, as they would prefer to sit next to you rather than across the desk from you. They avoid conservative dress and are more casual with their personal style.

When you are providing service to an expressive, take extra time to discuss everything. Give them recognition and approval. Appeal to their emotions by asking them how they feel about the product or service; focus on the big picture of what is possible because of buying your product or service. If you try to dazzle them with data, you will not get very far.

## Personality Styles

### Understanding Introverted vs. Extroverted Customers

Building on the foundational understanding of the behavior styles discussed above, it's important to recognize that broader personality traits, such as introversion and extroversion also influence customer interactions. While behavior styles describe how customers process information and make decisions, introversion and extroversion reveal preferences for social interaction and communication. These traits can shape how customers engage with service environments, interact with staff, and respond to different touchpoints. Understanding these dynamics allows service providers to adapt their approach, ensuring a more personalized experience that resonates with each customer's unique preferences.

**Extraversion** is the state of primarily obtaining gratification from outside oneself. Extraverts tend to enjoy human interactions and to be enthusiastic, talkative, assertive, and gregarious. Extraverts are energized and thrive off being around other people. They take pleasure in activities that involve large social gatherings, such as parties, community activities, public demonstrations, and business or political groups.

How does this apply to customer service and engagement? Extroverted customers, enjoy social interactions and are often more comfortable with verbal, spontaneous discussions. They may thrive in environments where they can build rapport with service staff and are likely to appreciate lively, high-energy environments (think interactive retail spaces, vibrant restaurants, or casinos). Extroverted customers may make quicker decisions based on verbal explanations, enthusiasm, or in-the-moment engagement.

On the other hand, **introversion** is the state of primarily obtaining gratification from one's own mental life. Introverts are typically perceived as more reserved or reflective. An introvert is likely to enjoy time spent alone and find less reward in time spent with large groups of people. Introverts are easily overwhelmed by too much stimulation from social gatherings and engagement and prefer to concentrate on a single activity at a time. They are also more analytical before speaking.

As customers, introverts tend to prefer lower-pressure interactions, value privacy, and often respond

better to clear, concise communication without excessive small talk. For example, they may prefer email or online chat to face-to-face conversations or phone calls and prefer more tranquil, organized environments (e.g., spa-like atmospheres, quiet hotel check-ins). Introverted customers will likely take more time to process information before making a decision, preferring written details or time to reflect.

While introversion and extroversion are broad traits, recognizing these tendencies allows businesses to create more personalized and comfortable customer experiences. For example:

- A hotel offering digital check-ins might attract introverted customers who want to avoid long conversations at the front desk.
- A tour guide who tailors their approach to extroverted customers might spend extra time engaging in storytelling or interactive activities.

## Emotional vs. Logical Decision-Makers

The emotional vs. logical decision-making styles focus on the underlying drivers of customer choices, offering a different lens than behavior styles (e.g., analytical, expressive) or personality traits (introversion vs. extroversion). While those frameworks deal with *how* customers behave or communicate, the emotional/logical lens reveals *why* they make decisions, particularly in service scenarios. Here's how they differ:

**Emotional decision-makers** prioritize feelings, intuition, and subjective experiences. Their decisions are often driven by personal values, mood, or how a product or service makes them feel. They are more likely to be influenced by storytelling, testimonials, and visuals that evoke emotions. Customers who are emotional decision-makers would choose a boutique hotel because its ambiance feels cozy and personal, even if it costs more than a chain hotel or pick a restaurant entrée because it reminds them of a childhood memory, rather than its nutritional value or price.

Emotional customers respond well to warm, empathetic interactions. Service providers can appeal to this style by creating memorable experiences, demonstrating empathy, or highlighting emotional benefits (e.g., "This vacation will be a lifetime of memories!").

**Logical Decision-Makers** rely on facts, data, and objective reasoning. They evaluate options based on features, benefits, and value. This group is less swayed by emotional appeals and prefers clear, evidence-based communication. For example, a business traveler selecting a hotel based on proximity to a conference and availability of amenities like high-speed internet or a diner choosing a meal based on price, nutritional content, or how well it aligns with their dietary goals would be characterized as logical decision-makers

Logical customers expect clear, transparent information and appreciate a professional, no-frills approach. Service providers should focus on communicating value, highlighting features, and delivering what was promised without overpromising.

Emotional/logical decision-making isn't about *how* customers interact (like behavior styles) or *who* they are (like introversion/extroversion); it's about the *motivation* behind their choices. An introverted customer, for example, could still be an emotional decision-maker if their choices are deeply tied to personal feelings or memories. Conversely, an extroverted customer could still make highly logical decisions based on data.

Understanding these decision-making styles allows service providers to better tailor their messaging, interactions, and environments to satisfy different motivational drivers, ultimately exceeding customer expectations.

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## Categorizing Customers by Type

When asked, most people understand what a customer is since virtually everyone on the planet, at one time or another, has the experience of purchasing goods or services from somebody else. Whether you are buying socks at a clothing store, eating at a restaurant, or streaming an online movie, the customer is, in fact, the very essence of successful business.

Each customer has unique needs, preferences, and behaviors, which means a one-size-fits-all approach won't always be effective. Understanding the various types of customers that interact with your business is key to providing exceptional service and fostering lasting relationships. By recognizing and adapting customer service strategies to the specific type of customer you're serving, you can enhance their experience, increase satisfaction, and encourage loyalty. In retail and hospitality, customer types can vary, but some common ones typically include:

### First-Time Customers

First-time customers are new to your business and may be unfamiliar with your offerings or brand. It's crucial to make their first experience a positive one. Greet them warmly and ensure they feel welcome. Take the time to guide them through your products or services, answering any questions they might have. Avoid overwhelming them with too much information, but offer enough details to make them comfortable with their choices. Introduce them to loyalty programs, special offers, or key services to increase the likelihood of repeat visits. Following up with a thank-you message or a special offer for their next visit can also help keep them engaged.

### Occasional Customers

Occasional customers are those who visit your business infrequently, typically when they have a specific need or when a promotion catches their eye. While they may not frequent your store

regularly, they still represent valuable business. When interacting with these customers, make sure their visit is memorable and welcoming. Personalize the experience by recalling any past interactions or purchases, if possible, and offer them relevant product recommendations based on their history. After their visit, follow up with a thank-you note, feedback request, or notification of upcoming events or sales to encourage them to return sooner rather than later.

## Loyal Customers

Loyal customers are those who repeatedly return to your business because they value the products or services you offer. Their commitment often stems from positive past experiences, and they tend to be brand advocates who trust your company. To effectively engage these customers, personalize their experience by acknowledging their loyalty and offering tailored recommendations based on their purchase history. Showing appreciation is key; small gestures like thank-you notes or birthday discounts can go a long way in reinforcing their loyalty. Additionally, proactively solving any problems or anticipating their needs can ensure that their positive relationship with your brand continues to thrive.

## Impulse Buyers

Impulse buyers are customers who make unplanned purchases, often driven by attractive displays, promotions, or emotional appeal. These customers typically don't come in with a specific need in mind but may be swayed by a great deal or an exciting product. The best way to serve impulse buyers is by engaging them at the right moment. Be attentive, but not overly pushy, offering assistance just as they show interest in a product. Creating a store environment with clear signage and attention-grabbing displays can help spark interest. Encourage thoughtful purchases by explaining the benefits of the item, but allow them to make their own decision. Even if they don't purchase, leave a positive impression to encourage future visits.

## Discount Shoppers

Discount shoppers are highly price-sensitive and often seek out the best deals, discounts, and promotions before making a purchase. They are focused on getting value for their money, but that doesn't mean they don't appreciate quality service. When interacting with discount shoppers, it's essential to be respectful of their need for bargains while also maintaining efficient service. Highlight any available sales, promotions, or membership discounts clearly and promptly. While assisting them, be quick and to the point, acknowledging that they may not want to spend too much time making decisions. Making them feel valued, despite their focus on price, will enhance their overall experience and keep them coming back for future deals.

## Need-Based Customers

Need-based customers enter your business with a specific product or service in mind. They know what they need and typically want to get in and out quickly. To serve these customers effectively, your first priority should be to listen carefully to their request and guide them directly to the product or service that fulfills their need. Avoid overwhelming them with unrelated options or upselling; instead, focus on providing clear, concise information about the item they are interested in. Being efficient and solution-oriented will ensure they leave satisfied and are more likely to return for future needs.

## Wanderers or Browsers

Wanderers or browsers are customers who don't have a specific purchase in mind and may spend time looking at various products or services without the intention of buying. These customers are often in the store or browsing online for leisure or exploration. To engage them, it's important to create a welcoming and intriguing environment. Greet them with warmth and let them know you're available for assistance, but avoid being intrusive. Provide interesting displays or product demonstrations that encourage exploration. If they seem intrigued by certain items, gently offer more information or suggest alternatives based on their interests. The goal is to make the experience enjoyable, so even if they don't make a purchase, they'll remember their visit positively.

## Angry Customers

Angry customers are those who are upset, often due to a negative experience, such as receiving poor service, encountering a defective product, or facing delays. They can be vocal about their frustration and may exhibit a heightened emotional response. When handling angry customers, it's crucial to stay calm and composed, ensuring that they feel heard and understood. Actively listen to their concerns without interruption, and acknowledge their emotions by expressing empathy. Apologize for the inconvenience, even if you're not at fault, and reassure them that their issue will be resolved. Offer a solution or compensation that addresses their concern, and follow through on your promises. After the situation is resolved, it's beneficial to check back with the customer to ensure their satisfaction and rebuild trust. A well-handled complaint can turn an angry customer into a loyal one.

## Internal Customers

Internal customers are all the employees, vendors, and other stakeholders of a business. This concept, attributed to quality management expert Joseph M. Juran, was introduced in the late 1980s.

Previously, only those individuals or organizations who purchased goods or services were considered customers. Today we view customers as those who shop in store, buy products, etc. as external customers. When we focus on “internal customers,” we’re examining the relationships with people who support our “external customers.”

What is the motivation to take care of internal customers?

W. Marriott, of Marriott International, a corporation renowned for providing exceptional customer service, emphasizes taking good care of their employees because, “If you take care of them, they’ll take care of your customers and the customers will keep coming back again and again.” Not only is Marriott International currently the world’s largest hotel company but it’s also continuously mentioned as one of the best places to work in the world.

Diana Dosik, a principal for Boston Consulting Group, further emphasized the importance of focusing on internal customer service during her TED talk, “Why we need to treat our employees as thoughtfully as our customers.”

Pay attention to what Dosik says about “getting you as a customer” and how a person’s journey is important to companies. As you watch this video, take note of where she discusses the “pain points” of employees. (Closed captioning available on YouTube.)



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## Customer Personas

Chapter 1 introduced the idea of customer personas as strategic tools that help provide an in-depth understanding of who a company’s customers are, what they need, and how they interact with the company across all touchpoints.

Assuming you have defined your target audiences, the next important step in developing an understanding of your key customers and target audiences is creating “data-driven customer personas”. Simply defined, **data-driven customer or buyer personas** are semi-fictional representations that showcase the key traits of a segment of your target audience, based on data you have collected from customer research and/or any other analytics platforms.

Here is a 9-minute video, **How To Create A User Persona**, that provides a nice summary of what customer personas are, as well as walks you through the process of building your own. Closed captioning is available on YouTube.



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Now that you understand what customer personas are, let's explore two different types of customer personas.

## Data-Driven vs. Adhoc or Lean Customer Personas

The main difference between “data-driven” customer personas and “proto, adhoc, or lean” customer personas has to do with how the personas are created. In an ideal world, you start with a blank sheet of paper, make no assumptions, and conduct extensive audience research. You talk to lots of real-world people and use the data collected to construct personas. This is the data-driven approach, and it is how personas should – *ideally* – be created.

That said, many organizations do not have the time, budget, or desire to do this level of research. So, rather than stall the customer persona process or have no personas at all, you can use a different approach: proto or ad hoc customer personas. This approach is described in detail in the book *Lean UX* by Jeff Gothelf and Josh Seiden, and as a result, these personas are sometimes also called lean personas.

**Adhoc, or lean personas** normally are not created by doing extensive external audience research, but rather by collecting information primarily from within an organization. For example, you might hold a workshop or meeting with various stakeholders and ask them to *describe* your target audience. Based on everyone's input and/or experience, you can start building some 'rough' personas.

The critical thing to note is that these rough personas are not research-led and therefore contain assumptions or biases that may or may not be true. While lean personas can be useful tools, treat them with caution and verify them with research – even if that research happens well after you have created your rough personas. A good approach is to start with a few lean personas to get the process rolling and to get stakeholder buy-in. Then, over time, conduct research to verify and validate their accuracy and refine them as you gain more audience insights and gather more audience data.

## How to Build a Data-driven Customer Persona

Below is a framework that will cover all the foundational aspects of a customer persona. However, please keep in mind that all customer personas should incorporate multiple viewpoints, i.e., if a

customer persona is being developed by a single person, with only one viewpoint in mind, for only one purpose, and/or for only one stage of your customer journey, your persona may not support your organization as a whole. As mentioned before, your customer persona should work for your product, marketing, sales, and customer success teams. So, try to include a variety of customer viewpoints in the following process because it will make your customer personas much stronger and applicable to the entire organization.

### 1. **Conduct Customer Research**

To get a deeper understanding of your target audience, start by seeking out the answers to the following questions:

- Who are your customers?
- How do they behave?
- What are they interested in?
- What kind of challenges do they face?

More specifically, here are several customer research data points that you may want to collect and document:

Category	Examples	Sources
<b>Demographics/ Backstory</b>	Name, birthplace, family history, childhood memories, first job, location, etc.	CRM, Public records, social media analytics
<b>Personal life</b>	Marital status, family size, pets, diet and fitness habits, etc.	Public records, social media
<b>Career</b>	Industry, job title, experience level, retirement plans, etc.	CRM, LinkedIn, online forums, Google
<b>Personality traits</b>	Introvert/extrovert, right brain/left brain, optimistic/pessimistic/etc.	Social media, customer surveys, interviews, List of 14 free personality tests, online comments
<b>Online behaviour</b>	Favorite social media platforms, search engines, mobile devices, etc.	Social media activities, online groups, forums, comments
<b>Purchasing behaviour</b>	Favorite online retailers, payment methods, spending habits, etc.	Google Analytics, Tag Manager, remarketing / retargeting tools, previous campaign analytics
<b>Goals and challenges</b>	Dream job, customer service experiences, regrettable purchases, etc.	CRM, customer service database, customer surveys, feedback, focus groups, online comments
<b>Objections</b>	Communication issues, product features, purchasing methods, etc.	CRM, customer support database, customer surveys, interviews, focus groups

For some more ideas, you may also want to consider **Hubspot's list of what you should consider when defining buyer personas.**

## 2. Identify Customer Pain Points

Either through customer surveys, interviews, or social listening, you will want to identify the key pain points your customers have, e.g.:

- What problems or hassles are they trying to solve?
- What's holding them back from success?
- What barriers do they face in reaching their goals?

## 3. Identify Customer Goals

This is the flip side of pain points. Pain points are problems your potential customers are trying to solve. Goals or aspirations are positive things they want to achieve. Depending on the kinds of products and services you offer, these goals might be personal or professional. Similar to

above, this information can be acquired through customer surveys, interviews, or social listening.

#### 4. **Understand How You Can Help**

Now that you understand your customers' pain points and goals, it's time to create a really clear picture of how your products and services can help. Stop thinking about your brand in terms of features and dig deep to analyze the benefits you offer to customers. Consider your products and services from a customer's point of view. And, keep in mind the following three questions:

- How can we help?
- What are your audience's main purchasing barriers?
- How can you help customers overcome any barriers / pain points and achieve their goals?

#### 5. **Define and Name Your Customer Personas**

Define and name these customer segments. Start looking for common characteristics and patterns. As you group those characteristics together, you'll have the basis for your unique customer personas. Take your collection of characteristics and turn them into a persona that you can identify with and speak to. Give your customer persona a name, a job title, a home, and other defining characteristics. You want your persona to seem like a real person.

#### *Tools for Creating Customer Personas*

Here are few online tools that you can use to easily create a visual customer persona:

- **Hubspot's Make My Persona**  
Hubspot's persona generator is a step-by-step wizard that will walk you through the process of creating a useful customer persona for your organization. A nice touch is that it allows you assign photos to your personas as well as names. It is focused on professional clients and customers, or business to business (B2B) use. Expect to be asked for information regarding not only their job title and career goals, but also the tools they use at work, who they report to, and who reports to them. This won't be necessary information for everyone who wants a buyer persona, but some will be delighted by this. Again, this requires you to use the tool with data you've segmented elsewhere and simply input that data.
- **Xtensio**  
This is a free tool that has an attractive and easy-to-use persona template. This is primarily about designing your customer persona, i.e., you will still need to complete your data analyses elsewhere.
- **Flow Mapp**  
Similar to Smaply, Flow Mapp allows you to create customer personas and customer journeys using the same tool. They offer a very easy-to-use, design editor with drag-and-drop content blocks, which makes creating and updating personas and customer journeys quite easy. As an

extra bonus, you can also use Flow Mapp's online collaborative tools to design your websites and apps.

## Why Use Customer Personas?

Customer personas assist businesses in knowing what to promote, to whom, when, and through which marketing channels. With digital marketing on the rise and more and more marketing channels available to marketers, making sure you spend your time and money on the appropriate marketing channels and activities can define your organization's success or failure.

In this article, **What is a 'Buyer Persona' and Why is it Important?**, there is a list of areas across your organization where customer personas can guide the direction of your work, for example:

- **Product or Service Development**

Product development can use customer personas to help guide and build product or service roadmaps.

- **Marketing Strategies & Activities**

Marketing can use customer personas to build effective strategies and also identify and prioritize marketing activities.

- **Sales Prospecting & Sales Calls**

Customer personas can help your sales team build rapport with potential customers by understanding what they want and being prepared to address their concerns.

- **Customer Support**

Customer support teams can use personas to better serve your customers by being trained on the problems your customers are trying to solve with your product or service.

- **Designers**

Designers can use user experience (UX) / user interface (UI) personas to develop and test useful and understandable visual customer experiences that support an organization's conversion strategies and goals.

- **Competitive Intelligence**

Generate personas for competitors and discover trends as they happen. As a result, you may be able to uncover content, advertising, and partnership opportunities/strategies.

Please note that any tool and any type of market research can result in faulty insights. The key is to choose the proper tool and use it correctly. Bottom line: the identified issues are not inherent

flaws in personas, but rather flaws in **implementing** personas. These flaws can be fixed by proper management, real customer data, and regular updating of personas.

Hopefully, you can see how powerful customer personas can be as a marketing and organizational tool. Knowing how to analyze and create your own customer personas can be important, especially as organizations experiment and try to connect with new target audiences. That said, do try, as much as possible, to develop your customer personas based on data and solid customer research!

### Key Takeaways

Customer personas are important strategic and tactical tools that supports many of your digital marketing strategies and activities.

- Data-driven customer or buyer personas are semi-fictional representations that showcase the key traits of a segment of your target audience, based on data you have collected from customer research and/or analytics.
- To Build a Data-driven Customer Persona:
  1. Conduct Customer Research
  2. Identify Customer Pain Points
  3. Identify Customer Goals
  4. Understand How You Can Help
  5. Define and Name Your Customer Personas

## Notes

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# Chapter 9: Service Breakdowns & Recovery

## *Learning Objectives*

After reviewing this information, you should be able to do the following:

1. Define service breakdowns and explain their impact on customer satisfaction and business success.
2. Identify common types of service failures, including process failures, product failures, and communication failures.
3. Analyze the importance of empathy in service recovery and its role in rebuilding customer trust.
4. Outline the key steps in the service recovery process.
5. Develop strategies to handle service failures effectively, including communication, corrective actions, and follow-up.
6. Evaluate proactive measures businesses can take to minimize service failures and create a seamless customer experience.
7. Recognize the concept of the service recovery paradox and how effective recovery can enhance customer loyalty.

## Mistakes Happen

In any customer service setting, mistakes and service failures are inevitable. Despite an organization's best efforts to deliver seamless customer experiences, **service breakdowns** can occur due to process failures, miscommunications, or unforeseen circumstances. What sets successful businesses apart, however, is how effectively they handle these service breakdowns. Service recovery is not just about fixing the problem—it's about restoring customer trust, rebuilding relationships, and demonstrating a genuine commitment to customer satisfaction.

When customers experience a service failure, they often feel frustrated, disappointed, or even angry. How an organization responds in these critical moments can determine whether the customer remains loyal or decides to take their business elsewhere. By addressing the issue promptly, apologizing sincerely, and offering meaningful solutions, companies can turn a negative experience into a positive one. In some cases, effective service recovery can even strengthen customer loyalty, a phenomenon known as the "service recovery paradox."

The **service recovery paradox (SRP)** is a situation in which a customer thinks more highly of a company after the company has corrected a problem with their service, compared to how they would regard the company if non-faulty service had been provided. The main reason behind this thinking is that successful recovery of a faulty service increases the assurance and confidence from the customer.<sup>1</sup>

This chapter explores the causes and impacts of service breakdowns, the essential steps in the recovery process, and the tools and techniques that empower businesses to handle service failures effectively. By understanding the psychology behind customer reactions and implementing proactive measures to prevent issues, organizations can create a culture of exceptional service and resilience, even in the face of challenges.

Let's get started with the Best Service Recovery Story...Ever. (Closed captioning available on YouTube)



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## Extraordinary Customer-Service Problems

Many of the situations that customer-facing staff handle will pose a certain degree of difficulty. A customer might be extremely agitated from dealing with a defective product or service. The customer might have been referred to several different workers or departments before they wind up with the customer service team, increasing their agitation even further. There may have been a miscommunication of a company's offer, and many expectant customers must be redirected or turned away. Alternatively, probably the worst scenario, someone may have been injured by your company's product.

Sometimes, the customer's problem can be more challenging than his or her reaction to it. Here are some of the more sensitive problems that customer-facing staff might encounter:

- A customer receives the wrong item or an incomplete order, such as a missing dish in a restaurant or the wrong product shipped by an online retailer.
- A customer experiences excessive delays, such as waiting too long for service at a restaurant, a late delivery, or long hold times on a customer service call.

- Employees exhibit poor attitudes, lack empathy, or fail to communicate effectively, leaving customers feeling disrespected or undervalued.
- Customers encounter issues with technology, such as a malfunctioning website, a point-of-sale system crashing during checkout, or an app that doesn't process orders correctly.
- A business fails to deliver on advertised promises, such as a hotel room not matching the description, or a missed appointment or reservation due to overbooking.
- A lack of clear instructions, incorrect details provided, or failure to notify customers of changes, such as a flight delay or a service disruption, leading to confusion and frustration.
- A product is defective, damaged, or doesn't meet quality standards, or a service, such as a cleaning or repair job, is performed poorly or incompletely.

## Types of Service Breakdowns

As you can see from the examples listed above, service failures can take many forms, but they generally fall into three key categories: process failures, product failures, and communication failures. Each type represents a different way in which the customer experience can be disrupted, leading to dissatisfaction and frustration. Understanding these failures is crucial for identifying root causes and implementing effective strategies to prevent or address them.

1. **Process Failures** occur when the systems or procedures designed to deliver a service break down or are inefficient. These failures often involve issues with operations, logistics, or service delivery workflows. Examples include excessive wait times, lost reservations, or delays in processing orders. Such failures may stem from poor planning, lack of staff training, or inadequate resources. For instance, if a customer's food order is lost due to a restaurant's disorganized ticketing system, this constitutes a process failure. These incidents can leave customers feeling frustrated and doubting the company's competence.
2. **Product Failures** arise when the tangible goods associated with a service fail to meet customer expectations or function properly. These failures can include defective merchandise, incorrect items being delivered, or goods arriving damaged. For example, a hotel providing malfunctioning amenities (like a broken air conditioner) or an online retailer delivering a damaged product exemplifies product failures. These issues are particularly critical because customers often expect reliability and quality from the products they purchase, and failures in this area can erode trust in the brand.
3. **Communication Failures** happen when there is a breakdown in the exchange of information between the business and the customer. This can include unclear instructions, contradictory messages, lack of updates, or failure to communicate changes or delays. For instance, if an airline fails to notify passengers of a flight delay, or a customer support representative provides incorrect information about a refund, these are examples of communication failures. Such issues often amplify customer frustration, as they feel neglected, misinformed, or unimportant.

It is essential to respond to these special problems with care, even if the customer does not seem to be particularly upset over the situation. ***Rather than complaining, about half of all customers***

***who experience service problems will simply take their business elsewhere.*** The average business loses approximately 15 percent of customers each year due to unsatisfactory service. A customer's problem might also indicate a greater issue within your company that needs addressed, before even more customers are impacted.

Furthermore, you can assume unsatisfied customers will be sharing their unhappy experiences with their colleagues and friends, and that may cost a company considerably more in bad public relations. This is especially critical since the word of past customers can carry much more weight than a company's best advertising efforts. Moreover, with customer ratings available on many online sources, each bad comment can reach vast numbers of current and potential customers.

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## Service Recovery

Most service breakdowns can be remedied with the same basic tactics you apply to any customer service situation: Listen to your customer's explanation of an issue clearly, take ownership of the problem, and turn the problem's solution into a partnership—you and the customer working together to achieve a speedy resolution and satisfaction. As with every other aspect of customer service, this requires effective communication, a positive attitude, and your demonstrated commitment to fix whatever is wrong.

You might also need to take the issue to a higher level, especially in the event that a problem could result in legal liability for your company. During your training phase for a customer service position, you likely will be instructed on the situations that warrant an immediate referral to a supervisor.

Among the very first steps once you have identified your customer's unique problem is to offer an apology, with sincere remorse for a customer's inconvenience. Then, apologize again. A simple apology may go a long way in defusing a customer's agitation. Don't argue with the customer, don't try to make excuses, and certainly don't try to place blame for a situation back on the customer.

Ultimately, you should try to counter the depth of a customer's disappointment and inconvenience with a sufficient level of remediation equal to the customer's loss. Your company's policies might detail possible remedies and compensations, such as a full and immediate refund, a discount on service for a given period, or a discount on a future purchase. Offering these and other alternatives may require assistance from your supervisor.

As you identify possible solutions to your customer's problem, you should carefully help your customer assess and choose among the options that may be available. By bringing your customers into the process as a participating partner, you empower them and give them a sense they still have control over a situation that may have left them feeling powerless.

As you resolve service problems, try to exceed your customer's expectations, to the extent possible. Most importantly, try to return your customer to a reasonable state of satisfaction, and be sure to provide a follow-up to ensure that your customer remains satisfied. And keep in mind, the results of

an unresolved customer problem can have ramifications and costs far beyond the immediate issue at hand.

## Dealing with Difficult Customers

With some customer service problems, your customer might remain calm and reasonable no matter how upset they might actually be. In other situations, no matter how trivial the problem, your customer will be difficult, demanding, angry, rude, and even potentially violent. Short of hanging up or calling security, there are certain fundamental yet important steps you can take to deal with difficult customers.

One of the first steps when dealing with a challenging customer is to protect yourself with the proper mindset and attitude. Just because your customer is agitated or angry does not mean you need to absorb it or respond in kind. Studies show that just a few minutes of a strong negative emotion such as anger can demolish your body's immune system for many hours afterward. Remember you cannot always control how a customer reacts to a given problem, but you can control how you respond. Rather than escalate an unpleasant situation, you can try some tactics to defuse it. You can do this by remaining focused, alert, understanding, caring, unemotional, and – most of all – patient.

## Defusing Customer Misbehavior

There is an ancient adage that a gentle word turns away wrath, and that's as true today. A rude, angry, or belligerent customer might be calmed with a simple, "I'm sorry this has upset you ... let's see how we can fix it."

Dealing with difficult customers will put your communication skills to the highest test. It may be best to let your customer vent a little before you come back with a response. Remember to speak slowly, use short sentences, be tactful, and follow the golden model of customer service: **listen**, **empathize**, and **take charge**.

It helps to use a customer-centric perspective that puts you in the place of your customer. Try to see the situation as they do. What exactly is causing them stress? What are the solutions they might find satisfactory? How can you apply those solutions with minimum effort?

You should also employ tactics of effective listening. This helps your customers feel their message is coming through, and you understand their problem clearly. The first step is to smile, to show you are a friendly ally sent to fix the problem. Smile even if you are on the phone—that gesture might come through in your voice. Do not interrupt while your customer is explaining a problem, other than to help clarify an issue. If it's in person, lean toward your customers and turn an ear their way to show you are intently listening. Especially if it's a conversation on the telephone, be sure to use affirmative

words and sounds such as uh-huh, yes, I see, to demonstrate that you are listening, and to encourage your customer to continue.

## The Importance of Empathy in Service Recovery

Empathy is one of the most critical skills in customer service, particularly during moments of service breakdowns. It allows service providers to understand and acknowledge the customer's feelings, frustrations, and concerns, creating a connection that goes beyond solving the immediate problem. When customers feel that their emotions are validated and that the company genuinely cares about their experience, they are more likely to remain loyal, even after a negative incident.

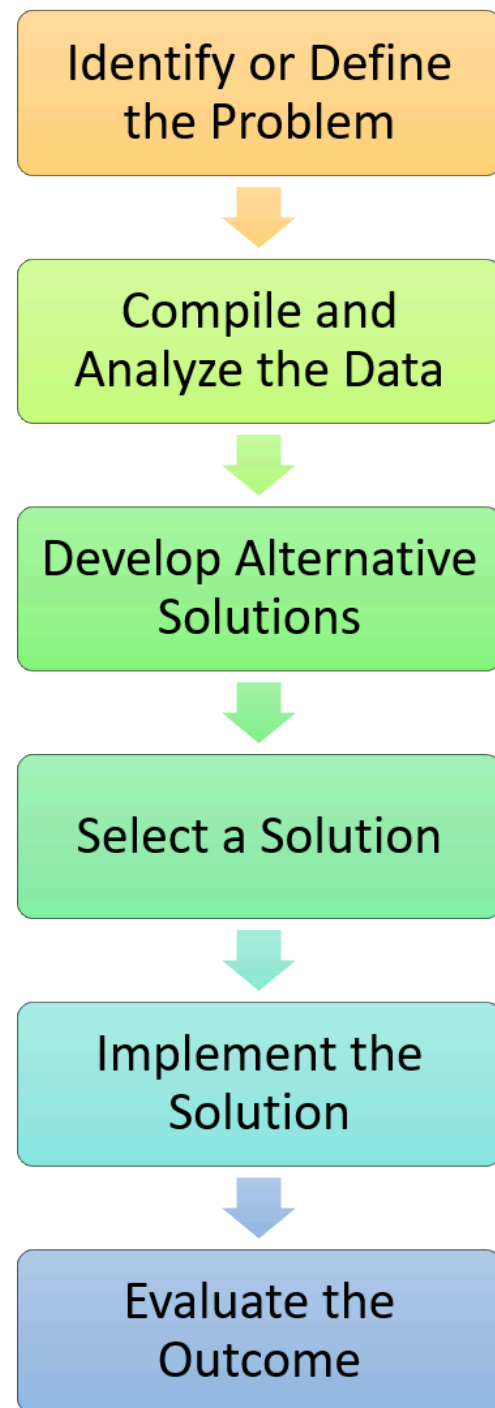
Empathy helps defuse anger and build trust, as it demonstrates that the business is willing to take responsibility and prioritize the customer's needs. For example, an empathetic response might involve actively listening to the customer without interrupting, using phrases like "I can understand why this would be frustrating for you," and offering a heartfelt apology. This emotional connection can transform a potentially damaging situation into an opportunity to strengthen the relationship, showing customers that they are valued as individuals, not just as transactions.

Moreover, empathy is essential for empowering employees to provide personalized solutions. By putting themselves in the customer's shoes, employees can tailor their responses to address not only the practical issue but also the emotional impact of the service failure. This human-centered approach is key to turning a dissatisfied customer into a loyal advocate for the brand.

## Problem-Solving Model

Another great way to solve customer problems is to apply a problem-solving model. **Problem-solving model** provides you with concrete, easy to remember steps you can work through when faced with any issue, customer service related or other. Your company may have its own version of how to approach customer problems, but here is a simple breakdown used by many customer service teams around the world in some similar variation.

1. **Identify or Define the Real Problem.** What exactly is the problem? You may need to ask the customer some open-ended questions to gather more information or do some research to look into some facts, then determine with the customer what the exact problem is. You want to be solving the customer's problem and not assuming you know what they are upset about.
2. **Compile and Analyze the Data.** To be able to effectively determine a course of action you need as much information as possible. You may need to collect information from a variety of sources. Collate the information in a structured way, and focus in on the underlying causes of the problem.
3. **Develop Alternative Solutions.** Analytical, creative problem solving is about creating a variety of solutions, not just one. At this stage, it is not about finding one solution but eliminating the options that will prove less effective at dealing with both the symptoms and the root cause.
4. **Select a Solution.** You need to examine which alternative solutions best solve the problem as well as which solutions are doable. If your company, for example, is not able to provide the solution you selected, then you would not want to offer it to the customer. You might offer a choice of solutions to the customer, those that are feasible, and let your customer select the one they prefer. If the solution is too unrealistic, too expensive, too time consuming, or too risky for your company, then you need to go back a step and consider additional alternatives. As well, if the solution is not satisfying the customer or solving the problem, you need to backup and consider alternative solutions; you may even need to bring your manager into the conversation.
5. **Implement the Solution.** Take action. You may need to communicate with other team members or your manager to put the solution into action, or you may simply need to apologize to the customer, thank them for bringing this issue to your attention, and/or



*Problem Solving Steps*

refund the customer. If the problem was more complex you may have to reorder an item and provide the customer with a receipt and expected delivery date. Following up with the customer is a best practice in these more complex cases.

6. **Evaluate the Outcome.** Follow up with the customer and/or your team to ensure the solution was implemented and the customer is satisfied. You may need to take action to correct something if things did not go as planned and it is better to catch this before you lose the customer completely. You might even ask the customer to provide feedback, evaluate the service, or complete a survey. You might need to adjust the customer service process if the process was an issue, and this may include sharing the experience with your manager, especially if the process is broken and causes several customers to become dissatisfied. You can suggest improvements to your manager and avoid repeat customer service breakdowns. Your manager will be happy you did.

## Customer Service Do's and Don'ts

Before we discuss best tips on what to do when dealing with difficult customers, let's first consider some important things **not** to do. As mentioned earlier, be sure not to get angry yourself, even if the customer starts to attack you personally as **uncaring** or **incompetent**. Your employer hired you because you have demonstrated both an aptitude for customer service and the skills to perform your job well. The customer is responding with a perspective muddled by emotion, and you must keep that in mind.

You should also avoid telling your customer to calm down. That may make you appear adversarial to agitated customers, rather than as a helper trying to understand how they feel. Likewise, don't feel a need to defend yourself. This can also create an adversarial relation. Rather, try to assure your customers you hear their concern, and you sincerely want to help.

Try not to interrupt your customers, especially while they are venting some of their anger. Once they have raged for a bit, they may be easier to reason with if you simply acknowledge their anger, and let them share some of it with you.

That said, let's summarize a roster of best tips to settle an upset customer, including a review of some points we may have considered earlier:

- Show empathy for customers' problems. Let the customers know their problems concern you as well (without letting it actually upset you, of course). Remember to use the magic words, "I'm sorry."
- Encourage an extremely agitated customer to vent a little before initiating steps to resolve the problem. You can use such phrases as "tell me about what happened."
- Don't take a customer's anger or insults personally. Instead, show you are on the customer's side. You might say something like, "I can understand why you're upset."
- Remain objective and calm. Take responsibility and keep a focus on achieving results. Assure the customer, "I'm sure we can fix this."

- Involve the customer. This returns a sense of empowerment to a customer who may be feeling powerless. Ask, “How would you like to see this resolved?”
- Provide clear options and steps to a resolution. Say, “Here is what we are going to do.”
- Exceed a customer’s expectations. Let the customer know, “... and here is what else we have for you.”
- Finally, assure the customer that you will advise management of the problem to prevent a similar situation in the future.

If you can apply these simple tips, you might be able to handle most of the difficult customer interactions that come your way. And, the final best tip: when in need, call for help! Your supervisor and coworkers will be quick to come to your aid. Someday, they may call on you for your service skills and cool head.

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## Preventing Service Failures

Preventing service failures is far more effective than trying to recover from them after they occur. By adopting proactive measures, businesses can identify potential risks, streamline processes, and create a service culture that prioritizes customer satisfaction. These strategies not only minimize disruptions but also build trust and loyalty by ensuring a consistently positive customer experience.

1. **Employee Training and Development** Well-trained employees are the foundation of effective service delivery. Comprehensive training programs should focus on equipping staff with the technical skills, product knowledge, and soft skills needed to perform their roles competently. For instance, frontline employees should be trained to anticipate customer needs, resolve issues effectively, and communicate clearly. Continuous development through workshops, role-playing scenarios, and coaching ensures that employees remain skilled, engaged, and prepared to handle challenging situations.
2. **Standard Operating Procedures (SOPs)** Clear and well-documented SOPs help ensure consistency and minimize the risk of process failures. These guidelines provide employees with step-by-step instructions for handling routine tasks and unexpected issues. For example, a hotel can create an SOP for responding to guest complaints or managing overbooked rooms. Regularly reviewing and updating these procedures ensures they stay relevant and effective.
3. **Technology Integration** Leveraging technology can streamline operations and reduce human error, which is a common cause of service failures. Point-of-sale (POS) systems, reservation management software, and customer relationship management (CRM) tools can enhance accuracy, efficiency, and communication. For example, a restaurant can use a digital ordering system to reduce errors in order transmission between the front and back of house. Proactively investing in technology also helps businesses stay competitive and adaptive to changing customer expectations.

4. **Quality Assurance Programs** Implementing quality assurance (QA) programs ensures that services consistently meet or exceed customer expectations. QA efforts may include periodic audits, mystery shopping programs, or regular performance evaluations. By monitoring service delivery, businesses can identify and address potential weak points before they escalate into failures.
5. **Customer Feedback and Listening Mechanisms** Encouraging customers to provide feedback through surveys, comment cards, or online reviews offers valuable insights into potential issues. Analyzing this feedback helps businesses identify patterns, address common pain points, and make informed improvements. Proactively acting on customer feedback demonstrates that the company values its customers' voices and is committed to continuous improvement.
6. **Adequate Staffing and Resource Allocation** Insufficient staffing or poorly allocated resources can lead to overburdened employees and longer wait times, increasing the likelihood of service failures. Proactively managing schedules, forecasting demand, and ensuring employees have the tools they need to succeed can prevent operational bottlenecks and service lapses.
7. **Building a Customer-Centric Culture** A strong organizational culture that prioritizes customer satisfaction can prevent many service failures. Empowering employees to make decisions, rewarding excellent service, and fostering a shared commitment to exceeding customer expectations create an environment where proactive measures are second nature.

By implementing these proactive measures, businesses can reduce the likelihood of service breakdowns, enhance operational efficiency, and create a seamless and positive experience for their customers.

## Notes

1. Krishna, A., Dangayach, G. and Sharma, S. (2014). Service Recovery Paradox: The Success Parameters. *Global Business Review*, 15(2), pp.263-277.



# Chapter 10: Customer Service in a Diverse World

## Learning Objectives

After reading this chapter, you should be able to know and learn the following:

1. Identify the benefits of diversity in the workplace.
2. Discuss strategies for dealing with diverse customers.
3. Discuss unconscious bias and strategies to address it.

## Introduction

When you're building a team, you don't want twenty people who all think, act and believe the same. You want a thriving workplace where everyone has different perspectives and can bring new and exciting ideas to the table.

When diversity, equity and inclusion are brought up, they tend to be banded together. Though this is common, it's important to note that they mean completely different things. While it's true that you can't have one without the other, there are key differences that separate the three. But what exactly is the difference? We'll take a closer look at the differences and how making sure that workplaces have plenty of each, is important.

Watch "What is Diversity, Equity and Inclusion?" YouTube video to introduce the key differences between these terms and how it impacts business today.<sup>1</sup> Closed-captioning is available on YouTube.



*One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=129#oembed-4>*

To summarize:

**Diversity** can be defined as the practice of including people from a range of different aspects of life. These could be personal, physical and social characteristics. This includes but is not limited to gender, ethnicity, age, income and education. It can also be various physical or mental disabilities and sexual orientation.

**Equity** aims to ensure fair treatment, access, equality of opportunity and advancement for everyone while also attempting to identify and remove the barriers that have prevented some groups from fully participating. As such, companies that adopt equity practices don't establish one-size-fits-all policies. Rather they take individual needs into consideration, while also readjusting organizational structures to account for the disadvantages minority groups face.

**Inclusion** builds a culture where everyone feels welcome by actively inviting every person or every group to contribute and participate. This inclusive and welcoming environment supports and embraces differences and offers respect to everyone in words and actions. A work environment that's inclusive is supportive, respectful and collaborative and aims to get all employees to participate and contribute. An inclusive work environment endeavors to remove all barriers, discrimination and intolerance.

In business, this is the ability to integrate everyone within the workplace and create a safe and inclusive atmosphere. It's allowing people's differences to coexist in a mutually beneficial way.

## Benefits of Diversity

What is the business case for diversity? Having and managing a diverse workforce effectively has the potential to bring about several benefits to organizations.

### Higher Creativity in Decision Making



*A diverse team can drive higher levels of creativity. Photo by Andrea Piacquadio from Pexels*

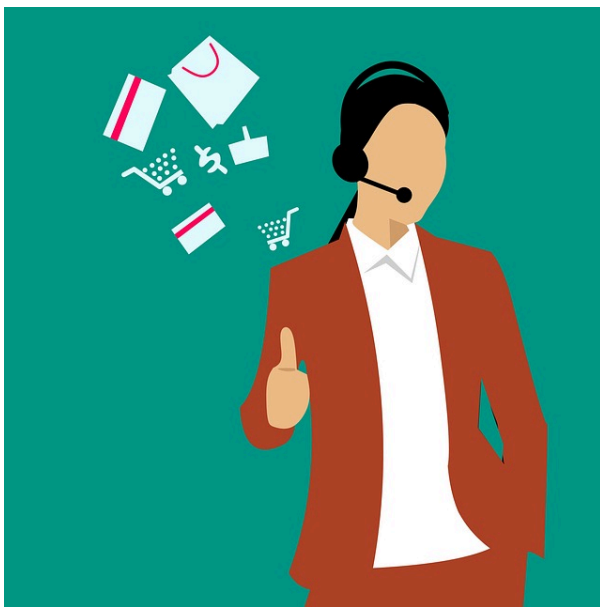
An important potential benefit of having a diverse workforce is the ability to make higher quality decisions. In a diverse work team, people will have different opinions and perspectives. In these teams, individuals are more likely to consider more alternatives and think outside the box when making decisions. Research also shows that diverse teams tend to make higher quality decisions.<sup>2</sup>

There's a fascinating correlation between being exposed to other cultures and creativity. So, what is it about multicultural experiences that enhances creativity?

Forbes reports that diverse teams are more creative because a person's individual creativity is enhanced by their ability to integrate different points of view—something that many of us learn when interacting with people from different backgrounds. In fact, multicultural experiences have been found to improve awareness of the underlying connections between different ideas, as well as enhance idea flexibility.

Therefore, having a diverse workforce may have a direct impact on a company's bottom line by increasing creativity and innovation in decision-making.

## Better Understanding and Service of Customers



*Engaged employees win engaged customers who buy more and generate higher revenues and profits for the company. Image by Mohamed Hassan from Pixabay*

A company with a diverse workforce may create products or services that appeal to a broader customer base. For example, PepsiCo Inc. planned and executed a successful diversification effort in the recent past. The company was able to increase the percentage of women and ethnic minorities in many levels of the company, including management. The company points out that in 2004, about 1% of the company's 8% revenue growth came from products that were inspired by the diversity efforts, such as guacamole-flavored Doritos chips and wasabi-flavored snacks. Similarly, through Jazz Aviation's formal "Jazz Lends a Hand" community program, employees can apply for a paid day off to volunteer with a charity of their choosing. Jazz Aviation offers scholarships to students enrolled in Aircraft Maintenance Engineer (AME) programs at local community colleges and provides mentoring to apprentice AMEs. In

addition, the company maintains a tool purchase program, an interest-free payment program to help AMEs spread the cost of tools over an extended period. "For Jazz, diversity is not a program, it is core to the makeup of our people and business. To be a leader in our industry and to have a competitive advantage, Jazz celebrates differences and values the uniqueness that everyone has to offer" (Chorus Aviation Inc., 2019).

A company with a diverse workforce may understand the needs of groups of customers better, and customers may feel more at ease when they are dealing with a company that understands their needs.

## More Satisfied Workforce



Image by fauxels from Pexels

When employees feel that they are fairly treated, they tend to be more satisfied. On the other hand, when employees perceive that they are being discriminated against, they tend to be less attached to the company, less satisfied with their jobs, and experience more stress at work.<sup>3</sup> Organizations where employees are satisfied often have lower turnover.

Mastercard consistently makes it into the Top 10 of DiversityInc's 50 Best Companies for Diversity list. They believe that "diversity is what drives better

insights, better decisions, and better products. It is the backbone of innovation". A particularly unique project that Mastercard has executed over the past few years involves getting older employees in the company more active when it comes to social media. To address generational barriers, "YoPros" BRG (the Young Professionals Business Resource Group) offers a one-on-one 'Social Media Reverse Mentoring' program to older employees who want to become familiarized with the platforms.

At Coca-Cola, diversity is seen "as more than just policies and practices. It is an integral part of who we are as a company, how we operate and how we see our future." With its new paid family leave policy for all parents and caregivers, Coca-Cola is committing to the health and well-being of all employees and their families. Many LGBT people build their families through adoption, and additional time at home helping a baby or child transition into a new family environment is important. Likewise, for single parents who are LGBT, this extended paid leave allows more time to secure their child's well-being, including finding reliable childcare.

## Market Reputation



*Market reputation is driven by the extent of diversity and inclusion practices actively implemented : Image by Tumisu from Pixabay*

Companies that do a better job of managing a diverse workforce are often rewarded in the stock market, indicating that investors use this information to judge how well a company is being managed.

Although gender, generation, and sexual orientation are all part of the diversity hiring strategy at Sodexo (a French food services and facilities management company that operates in 55 countries), they state that “gender balance is our business”, and their mission is to make it everyone else’s business too.

55% of all staff members in Sodexo are women – that’s up from just 17% in 2009. 58% of the members on the board of directors are female and the company runs 14 Gender Balance Networks worldwide. What they have found is that when there is an optimal gender balance within an organization, employee engagement increases by 4 percentage points, gross profit increases by 23% and brand image strengthens by 5 percentage points.

Barriers to leadership multiply for women who face intersecting forms of discrimination, such as racism, colonialism, ableism, (discrimination in favor of able-bodied people) and homophobia (the fear, hatred, discomfort with, or mistrust of people who are lesbian, gay, or bisexual). This has a significant impact on organizations that have biased preferences and could lead to poor reputation and business results.

Ekta Mendhi is Vice President-Technology, Infrastructure and Innovation at CIBC in Canada. She had served as the co-chair of Women in Capital Markets’, Women in Leadership Network, and co-founded the Canadian Gender and Good Governance Alliance. They found through their research that creating a more diverse board of directors can enhance decision-making process and augment an organization’s performance and market reputation.<sup>4</sup>

## Lower Litigation Expenses



Image by Okan Caliskan from Pixabay

Companies doing a particularly bad job in diversity management face costly litigations. When an employee or a group of employees feel that the company is violating equity laws, they may file a complaint or lawsuit. Regardless of the outcome, these lawsuits are expensive and include attorney fees as well as the cost of the settlement or judgment, which may reach millions of dollars. The resulting poor publicity also has a cost to the company.<sup>5</sup>

Shareholders interested in corporate diversity policies or in protecting their investment from future allegations of misconduct are turning more toward securities litigation to hold companies accountable. A recent example of this is an investor lawsuit filed against Tesla Inc. which accuses the company's leadership of exposing Tesla to potential liability by allowing a "toxic workplace culture" to exist.<sup>6</sup> Google, Inc. and L. Brands Inc. settled similar lawsuits and pledged millions of dollars to change corporate practices and towards diversity/equity initiatives. Pressure from investors has also led to broader disclosures. "Making this information public pushes companies to improve diverse hiring and retention, which can help avoid costly employment discrimination lawsuits or public relations scandals."<sup>7</sup>

## Higher Company Performance



Image by 3D Animation Production Company from Pixabay

If a company isn't viewed as being inclusive, some customers (including both in the B2B and B2C marketplaces) may shy away from giving you their business.

This is especially true with Millennial (anyone born from 1981 to 1996) and Gen Z (anyone born from 1997 to 2012) customers. These two generations are incredibly socially conscious. As a result, they may prefer inclusive companies when considering purchases in both their personal and professional lives. If you aren't seen as supporting diversity, you

may miss out on opportunities to increase sales, foster strong customer relationships, and ultimately enhance your profitability.

As a result of all these potential benefits, companies that manage diversity more effectively tend

to outperform others. Research shows that there is a positive relationship between racial diversity of the company and company performance.<sup>8</sup> Companies ranked in the Diversity 50 list created by *DiversityInc* magazine performed better than their counterparts.<sup>9</sup>

## Challenges of Diversity

If managing diversity effectively has the potential to increase company performance, increase creativity, and create a more satisfied workforce, why aren't all companies doing a better job of encouraging diversity? Despite all the potential advantages, there are also several challenges associated with increased levels of diversity in the workforce.

### 1. Similarity-Attraction Phenomenon

There is a tendency for people to be attracted to people similar to themselves.<sup>10</sup> Research shows that individuals communicate less frequently with those who are perceived as different from themselves.<sup>11</sup> They are also more likely to experience emotional conflict with people who differ with respect to race, age, and gender.<sup>1213</sup> Individuals who are different from their team members are more likely to report perceptions of unfairness and feel that their contributions are ignored.<sup>14</sup>

The **similarity-attraction phenomenon** may explain some of the potentially unfair treatment based on demographic traits. It embodies the popular adage, "birds of a feather flock together."

If a hiring manager chooses someone who is racially similar over a more qualified candidate from a different race, the decision will be unfair. In other words, similarity-attraction may prevent some highly qualified women, minorities, or persons with disabilities from being hired. Of course, the same tendency may prevent highly qualified Caucasian and male candidates from being hired as well but given that Caucasian males are more likely to hold powerful management positions in today's U.S.-based organizations, similarity-attraction may affect women and minorities to a greater extent. Even when candidates from minority or underrepresented groups are hired, they may receive different treatment within the organization.

For example, research shows that one way in which employees may get ahead within organizations is through being mentored by a knowledgeable and powerful mentor. Yet, when the company does not have a formal mentoring program in which people are assigned a specific mentor, people are more likely to develop a mentoring relationship with someone who is similar to them in demographic traits.<sup>15</sup> This means that those who are not selected as protégés will not be able to benefit from the support and advice that would further their careers. Similarity-attraction may even affect the treatment people receive daily. If the company CEO constantly invites a male employee to play golf with him while a female employee never receives the invitation, the male employee may have a serious advantage when important decisions are made.

## Faultlines



Image by svklimkin from Pixabay

A **faultline** is an attribute along which a group is split into subgroups. For example, in a group with three female and three male members, gender may act as a faultline because the female members may see themselves as separate from the male members. Now imagine that the female members of the same team are all over 50 years old and the male members are all younger than 25. In this case, age and gender combine to further divide the group into two subgroups. Teams that are divided by faultlines experience a number of difficulties. For example, members of the different subgroups may

avoid communicating with each other, reducing the overall cohesiveness of the team. Research shows that these types of teams make less effective decisions and are less creative.<sup>1617</sup> Faultlines are more likely to emerge in diverse teams, but not all diverse teams have faultlines. Going back to our example, if the team has three male and three female members, but if two of the female members are older and one of the male members is also older, then the composition of the team will have much different effects on the team's processes. In this case, age could be a bridging characteristic that brings together people divided across gender.

Research shows that even groups that have strong faultlines can perform well if they establish certain norms. When members of subgroups debate the decision topic among themselves before having a general group discussion, there seems to be less communication during the meeting on pros and cons of different alternatives. Having a norm stating that members should not discuss the issue under consideration before the actual meeting may be useful in increasing decision effectiveness.<sup>18</sup>

## Stereotypes

Your boss informed you that they need your assistance in training a new hire, Unax Uceda, in two weeks. Stop right there. What went through your mind when you read the new hire's name? Did you make any assumptions about the person based on their name? To process all the information you're exposed to on a daily basis, your brain creates shortcuts, which are called *stereotypes*.

**Stereotypes** are generalizations about a particular group of people. This stereotype may be based on your past experience with someone of a similar age, gender, ethnicity, background, education, etc., or your cultural biases and prejudices (which we all have). An important challenge of managing a diverse workforce is the possibility that stereotypes about different groups could lead to unfair decision making.

The assumption that women are more relationship-oriented, while men are more assertive, is an example of a stereotype. The problem with stereotypes is that people often use them to make decisions about a particular individual without actually verifying whether the assumption holds for the person in question. As a result, stereotypes often lead to unfair and inaccurate decision-making. For example, a hiring manager holding the stereotype mentioned above may prefer a male candidate for a management position over a well-qualified female candidate. The assumption would be that management positions require assertiveness, and the male candidate would be more assertive than the female candidate.

Stereotyping can cause low morale for the individual or group impacted and could potentially make for a toxic work environment. Employees who face constant comments, criticisms, or other negative results from stereotyping can lose motivation and interest in performing their jobs, lower their productivity, and lead to turnover. Stereotype threats can reduce job engagement, career aspirations, and receptivity to feedback.

Workplace stereotyping has short and long-term consequences. Let's review three effects.

- **Culture.** Company culture has a substantial impact on profitability. Workplace stereotypes are a massive roadblock to improving culture because they hamper employees' sense of belonging to the company.
- **Talent.** Stereotyping can prevent hiring managers from finding the best candidate for the job or prevent applicants from even wanting to apply to their positions. Candidates often screen companies using various websites to get an insider view before applying. Here are a few things they will take notice of.
  - Are all senior leadership members of one gender or ethnicity?
  - Are all the pictures of one ethnic group, or is there diversity?
  - They might review your company's LinkedIn account to get a feel for how long people stay at the company. If they find someone like them, they may reach out about the employee's experience of working for you.
  - There are many company review websites that allow candidates to read employee or previous employees' comments about working for the company and how they felt about leadership.
- **Legal.** If workplace stereotypes go unchecked, they can lead to workplace discrimination. Being sued for workplace discrimination takes time and financial resources and damages your company's image.

Being aware of stereotypes is the first step to preventing them from affecting decision-making.

## Neurodiversity

If you perceive your classmate to be a slow learner, highly erratic in behavior, unable to make

eye contact, displays variability socially, in learning, attention and moods, would you consider this classmate to be disabled? Would you classify your classmate as a disabled stereotype?

Neurodiversity describes the idea that neurological differences like autism, ADHD, and dyslexia are natural human variations that have benefits. The term “neurodivergent” describes people whose brain differences affect how their brain works. That means they have different strengths and challenges from people whose brains don’t have those differences. The possible differences include medical disorders, learning disabilities and other conditions. The possible strengths include better memory, being able to mentally picture three-dimensional (3D) objects easily, the ability to solve complex mathematical calculations in their head, and many more.

**Neurodivergent** isn't a medical term. Instead, it's a way to describe people using words other than “normal” and “abnormal.” That’s important because there’s no single definition of “normal” for how the human brain works.

The word for people who aren’t neurodivergent is “**neurotypical**.” That means their strengths and challenges aren’t affected by any kind of difference that changes how their brains work.

Dr. Nick Walker, a leading thinker in the emergent field of neurodiversity studies, says, “Neurodiversity is a natural, healthy, and important form of human biodiversity — a fundamental and vital characteristic of the human species, a crucial source of evolutionary and creative potential.”

Research has shown that people with autism often outperform others in auditory and visual tasks and do better on non-verbal tests of intelligence. A study by the University of Montreal found that in a test that involved completing a visual pattern, people with autism finished 40% faster than those without the condition.

What neurodiverse persons may lack in social skills, they can make up for with other talents, such as attention to detail, the ability to stick to a routine, and the ability to recognize patterns. A person with ADHD (attention deficit hyperactivity disorder), for example, can bring in creativity and innovation and not get tired easily.

We have to first get rid of our assumptions about neurodiversity and find the right person for the right job based on individual strengths and interests.

#### *Further Reading*

Click on the following website links for articles about neurodivergence in the workplace:

- [6 Business Icons Who Credit their Success to Neurodivergence](#)
- [Unique job site can help neurodivergent people find meaningful work — while being themselves](#)

# Cultural Diversity

**Culture** refers to values, beliefs, and customs that exist in a society. In the United States, the workforce is becoming increasingly multicultural, with close to 16% of all employees being born outside the country. In addition, the world of work is becoming increasingly international. The world is going through a transformation in which China, India, and Brazil are emerging as major players in world economics. Companies are realizing that doing international business provides access to raw materials, resources, and a wider customer base. For many companies, international business is where most of the profits lie, such as for Apple Inc. In the second quarter of fiscal year 2021, around 67 percent of Apple Inc's revenue was generated outside of the United States.

International companies are also becoming major players with foreign investors. Originally a Swedish company, Spotify now has headquarters in multiple areas across the globe including New York City. While its CEO and founder holds a large percentage of the company, Chinese investor Tencent Holdings Limited LLC bought 10% of the company back in 2017 while Spotify bought 10% of Tencent's holdings.

Americans are unlikely to see new, foreign brands on grocery store shelves anytime soon. Instead, they will be buying Entenmann's mini-chocolate chip cookies owned by Mexican firm Grupo Bimbo instead.

How do cultures differ from each other? If you have ever visited a country different from your own, you probably have stories to tell about what aspects of the culture were different and which were similar. Maybe you have noticed that in many parts of Canada people routinely greet strangers with a smile when they step into an elevator or see them on the street, but the same behavior of saying hello and smiling at strangers would be considered odd in many parts of Europe. In India and other parts of Asia, traffic flows with rules of its own, with people disobeying red lights, stopping and loading passengers in highways, or honking continuously for no apparent reason. In fact, when it comes to culture, we are like fish in the sea: we may not realize how culture is shaping our behavior until we leave our own and go someplace else. Cultural differences may shape how people dress, act, eat, form relationships, address each other, and many other aspects of daily life.

## Suggestions for Managing Diversity

What can organizations do to manage diversity more effectively? In this section, we review research findings and the best practices from different companies to create a list of suggestions for organizations.

### Build a Culture of Respect for Diversity

In the most successful companies, diversity management is not the responsibility of the human

resources department. Starting from top management and including the lowest levels in the hierarchy, each person must understand the importance of respecting others. If this respect is not part of an organization's culture, no amount of diversity training or other programs are likely to be effective. In fact, in the most successful companies, diversity is viewed as everyone's responsibility. Rogers Communications Inc. partners with Career Bridge to provide work to internationally educated professionals. Accenture Inc. has a global Persons with Disabilities Champions program, which is focused on workplace accommodations. Finally, British Columbia Hydro and Power Authority encourages managers to hire skilled newcomers, providing a career advancement plan.<sup>19</sup>

L'Oréal, a leading cosmetics company, also has a commitment to gender equality, with 69% of its workforce made up of women. L'Oréal achieves this by having a detailed diversity-and-inclusion strategy that the company implements at locations around the world, resulting in positive changes in its communities and elevating women into leadership positions across the company.<sup>20</sup>

Lenovo, a global PC provider, has built its company on the concept that "different is better," championing and weaving diversity into the fabric of its business. Lenovo has scored 100% on the Corporate Equality Index, a benchmarking report on corporate policies and practices regarding LGBTQIA equality, in both 2017 and 2019. The report evaluates LGBTQIA-related policies and practices, such as non-discrimination, workplace protections, domestic partner benefits and transgender-inclusive healthcare benefits.

The lesson to take from Lenovo is that the inclusion of progressive and inclusive policies and benefits helps you attract talent and makes more employees feel supported at work.<sup>21</sup>

Companies with a strong culture, where people have a sense of shared values, is rewarded with loyalty and team performance. This enables employees with vastly different demographics and backgrounds to feel a sense of belonging.<sup>2223</sup>

## Make Managers Accountable for Diversity

People are more likely to pay attention to aspects of performance that are measured. In successful companies, diversity metrics are carefully tracked. For example, in PepsiCo, during the tenure of former CEO Steve Reinemund, half of all new hires had to be either women or minorities. Bonuses of managers partly depended on whether they had met their diversity-related goals.<sup>24</sup>



Image by World Economic Forum via Flickr | CC BY-NC-SA

Ajay Banga, former CEO of Mastercard for 12 years, who led the company through a strategic, technological and cultural transformation said: “My passion for diversity comes from the fact that I myself am diverse. There have been a hundred times when I have felt different from other people in the room or in the business. I have a turban and a full beard, and I run a global company—that’s not common.”<sup>25</sup>

Mr. Banga in this excerpt from his talk at Stanford University has a simple solution for diversity. “We must surround ourselves with people who don’t look the same and have had different experiences. It is the best way to ensure we don’t fall victim to the same blind spots again and again and

again,” he said.

During his tenure as CEO, Mr. Banga ensured through his business leaders that men and women at Mastercard, at the same hierarchical level, were paid the same. This was not the case before he joined the company.

When managers are evaluated and rewarded based on how effective they are in diversity management, they are more likely to show commitment to diversity that in turn affects the diversity climate in the rest of the organization.

## Diversity Training Programs

Many companies provide employees and managers with training programs related to diversity. However, not all diversity programs are equally successful. If the program is not enforced and modeled by leadership, employees will lack the motivation to buy-in. If employees sense there is no commitment and accountability from senior leaders, it will impact the motivation and enthusiasm needed to implement a successful Diversity program.

A Diversity program cannot succeed in the absence of adequate representation of diverse groups of people. One key hindrance is the perception of diversity as anything other than meaning the inclusion of people of distinct ages, genders, ethnicities, social classes, income levels, and different cultural backgrounds.

You may expect that more successful programs are those that occur in companies where a culture of diversity exists. A study of over 700 companies found that programs with a higher perceived success rate were those that occurred in companies where top management believed in the importance of diversity, where there were explicit rewards for increasing diversity in the company, and where managers were required to attend the diversity training programs.<sup>26</sup>

## Review Recruitment Practices



Photo by Yan Krukau from Pexels

Companies may want to increase diversity by targeting a pool that is more diverse. There are many minority professional groups such as the National Black MBA Association or the Chinese Software Professionals Association. By building relationships with these occupational groups, organizations may attract a more diverse group of candidates to choose from. The auditing company Ernst & Young Global Ltd. increases diversity of job candidates by mentoring undergraduate students.<sup>27</sup> Companies may also benefit from reviewing their employment advertising to ensure that diversity is important at all

levels of the company.<sup>28</sup>

Today's job seekers have numerous tools available—from Glassdoor to LinkedIn—to evaluate a company before they ever apply for a job. Focusing on Diversity in the company's branding efforts is key to a diversity recruiting strategy. A strong employer brand will help you attract qualified candidates who want to work for the company.

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## Working with Customer Diversity

### Customer Diversity

Whether you are working in a customer-service calling center serving a global audience or staffing the customer service desk in a neighborhood retail store, you will most certainly be working with a broad range of customers. You will encounter different languages, cultural backgrounds, age groups, genders, and communication styles. Almost everyone you interact with will have a different preference for interpersonal modes and customs. As a skilled customer service worker (CSW), it will be your duty to connect with them in the way that best serves their needs, and your company's interests, in the most efficient and effective way possible.

Chances are you have already developed solid skills for communicating across cultural and demographic differences. Within your family, you may have a more informal way of communicating with siblings and cousins, while offering greater deference to your parents, aunts and uncles, and grandparents. As a student, you likely had classmates from a number of different cultural backgrounds, coming from different heritages, social customs, and religious beliefs. You may not have had to change your own mode of interaction, but you were still able to find common ground in order to get along and possibly even form friendships.

As a Customer Service Worker, you will need to modify your method of interaction to communicate well with your differing customers. Some may prefer you to assume a more authoritative communication style, with you taking (respectful) control of the interaction from start to finish. Others may expect a more passive approach, allowing them to lead the interaction up to the point where you are expected to resolve the matter with a deferential tone, perhaps even with a **yes sir**, or a **yes ma'am**. The primary goal is to achieve a satisfied customer, with minimum effort and maximum results on your part.

For example, people coming from different nations and cultures have various levels of the **power-distance** dimension—or the distances they believe to exist between different levels of society. Some cultures have a very high power-distance perspective, and they may well treat you with a certain disregard or even disdain. Cultures with a lower power-distance dimension may see you as a social equal, and will treat you with the same courtesy and respect you offer them in return. A large part of your job is not to judge the merits of cultural differences or change them, but to accommodate them in a way—within reason—that best serves your customer.

One of the biggest errors you might make is to try to apply your own cultural beliefs without modification to every customer from every background, which will most certainly lead to frustrated efforts, conflict, bad service, and ultimately a lost customer for your business. As time goes by and with experience, you will become ever better at reading your customers and swiftly modifying your approach as necessary to accommodate the differing demands of a situation.

## Serving Diverse and Multicultural Customers

There are a number of tactics you can employ to ensure optimal communication with regard to linguistic, cultural, and demographic factors. The most important of these is, do not assume your listeners understand your explanation of an issue simply because they may smile, nod their heads, or say **yes** when you ask them if you have made yourself clear. If your customer is a non-native English speaker, it is possible “yes” may be the only word he or she can say with any confidence.

Native English speakers take many things for granted: the slang and idioms of our language, the specific vocabulary of a trade, a speaking rate most non-native speakers find excessively fast. To communicate with a non-native English speaker, be sure to use simple Standard English. Keep your messages brief. If it seems your listener misunderstands a word or phrase, try rephrasing it one or two other ways. Use short bits of information, and confirm understanding before you go on. If you have a member on your team who speaks your customer’s language and can help, that is all the better.

Be careful with humor or slang that does not translate well across cultures; even if your customer understands the words, he or she may not understand the context or implied meaning. If you laugh, they may think you are laughing at them, rather than at a misunderstood joke. What you may interpret as wit, they may interpret as an insult.

Also, be careful with your gestures. Many cultures perceive the **OK** sign or a **thumbs-up** as insults. Some cultures are reserved with their physical movements and body language. Other cultures may gesticulate vividly without meaning to convey agitation.

The most effective way to approach customers' diversity is to apply the **Two Golden Rules of Customer Service**: 1.) find out what customers want, and 2.) treat them how they want to be treated.

Try to approach all interactions with a foremost desire to satisfy a customer, setting aside any of your own rigid opinions of how things should be done. Most of all, you should offer respect for the diverse behaviors and different customs among your customers, even though you may not understand (or even approve of) them.

If you can relax, enjoy, and even learn from the rich cultural and social differences you encounter, you will be well on your way to skillfully serving the wide spectrum of customers you are likely to engage.

## Unconscious Bias

An unconscious bias (also known as implicit bias) is an implicit attitude, stereotype, motivation, or assumption that can occur without one's knowledge, control or intention. Unconscious bias is a result of our life experiences and affects all types of people. Examples of unconscious bias include gender bias, cultural bias, age bias, language, and institutional bias.

Watch "Understanding Unconscious Bias" [2:59] which gives an overview of unconscious bias.<sup>29</sup> Closed captioning is available on YouTube.



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Unconscious biases are important to recognize in instances when quality, relevance and competence are being evaluated.<sup>30</sup>

## Types of Unconscious Bias

A vast body of research on unconscious bias shows that there are approximately 150 different types of unconscious biases. Given the various kinds of unconscious biases, all of us must be aware of our own unconscious biases. There are four fundamental unconscious biases.<sup>31</sup>

## Affinity Bias

Affinity bias (also known as the similarity bias) is when people like people who are perceived to be just like them. Any perceived connection, however big or small, can result in an affinity bias. Affinity bias is fertile ground for the exclusion of people. Our natural instinct to gravitate towards people who are like us. But making decisions solely on someone who is like ourself can cause tunnel vision.



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Watch the YouTube video “Blind Spots: Broaden Perspectives [3:24] to learn more about similarity bias and how to overcome it.<sup>32</sup> Closed captioning is available on YouTube.



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## Confirmation Bias

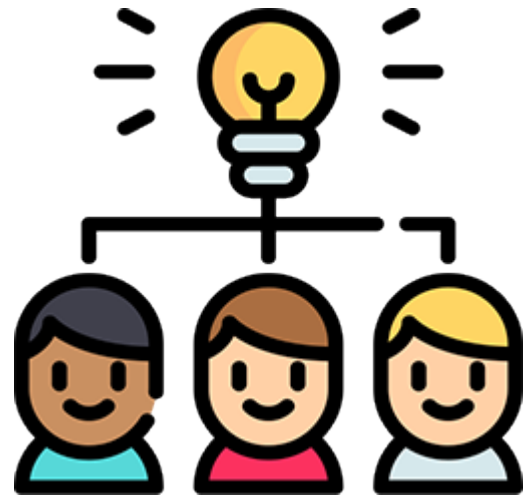


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Confirmation biases are realized when people attempt to prove assumptions and stereotypes. Confirmation bias impacts the organizational culture since people seek to confirm their beliefs or stereotypes in their interactions. Confirmation bias can affect assignments to work teams, and opportunities to participate in decision-making processes. People who exhibit confirmation bias do so after learning some aspect about a person or group and will then unconsciously seek confirmation or search for evidence to prove their assumptions. Remote learning can exacerbate confirmation bias since there is less opportunity to get to know people due to limited contact, whereas people will spend time confirming instead of getting to know someone.

## Groupthink or Conformity Bias

Groupthink is a type of unconscious bias where people want to achieve group consensus. People will adopt the thoughts and opinions of the group while setting aside their personal beliefs and values. Groupthink is present in many aspects but is mostly found to occur during decision-making processes. The most damaging effect of groupthink is the pressure on group members to conform to the group and form a consensus that results in the exclusion of other ideas, perspectives, talents, skills, and thoughts. Remote collaboration requires a diversity of thought, experiences, and backgrounds.



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## Perception Bias



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Perception bias is when people form generalized stereotypes and assumptions about particular groups of people. This type of bias renders it virtually impossible for people with this bias to remain objective when considering an individual in any aspect of the learning environment. Perception bias is present when a person focuses on irrelevant factors about someone they are perceiving (such as their gender, ethnicity, race, national origin, sexual orientation, etc.) and the stereotypes associated with each, rather than the qualifications and personality of the individual.

## Conscious Bias

Conscious Bias (also known as explicit bias) refers to the prejudiced beliefs or attitudes one has towards a person or group on a conscious level. Explicit attitudes are feelings and thoughts that one deliberately believes and can consciously document.

Unconscious biases are social stereotypes about certain groups of people that individuals form outside their own conscious awareness. Everyone holds unconscious beliefs about various social and identity groups, and these biases stem from one's tendency to organize social worlds by categorizing.

It is important to note that biases, conscious or unconscious, are not limited to ethnicity and race. Though racial bias and discrimination are well documented, biases may exist toward any social group. One's age, gender, gender identity, physical abilities, religion, sexual orientation, weight, and many other characteristics are subject to bias.

## Addressing and Combating Bias

Watch “4 Steps for Busting Unconscious Bias” [4:26], which details a step-by-step guide for recognizing and responding to our own unconscious biases.<sup>33</sup> Closed captioning is available on YouTube.



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You may read the detailed strategies from Implicit Bias.

### Activity: Identify Biases

1. Take the Project Implicit online self-assessment by Harvard University to identify your individual biases.

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You are invited to record your reflection in the way that works best for you, which may include writing, drawing, creating an audio or video file, mind map or any other method that will allow you to document your ideas and refine them at the end of this module.

Alternatively, a text-based note-taking space is provided below. **Any notes you take here remain entirely confidential and visible only to you.** Use this space as you wish to keep track of your thoughts, learning, and activity responses. Download a text copy of your notes before moving on to the next page of the module to ensure you don't lose any of your work!



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<https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=129#h5p-9>

## Key Takeaway



Organizations managing diversity effectively benefit from diversity because they achieve higher creativity, better customer service, higher job satisfaction, higher stock prices, and lower litigation expenses. At the same time, managing a diverse workforce is challenging for several key reasons. Employees are more likely to associate with those who are similar to them early in a relationship, the distribution of demographic traits could create faultlines within a group, and stereotypes may act as barriers to advancement and fair treatment of employees. Demographic traits such as gender, race, age, religion, disabilities, and sexual orientation each face unique challenges. Organizations can manage demographic diversity more effectively by building a culture of respect, making managers accountable for diversity, creating diversity-training programs, reviewing recruitment practices, and under some conditions, utilizing affirmative action programs.

## Exercises



1. What does it mean for a company to manage diversity effectively? How would you know if a company is doing a good job of managing diversity?
2. What are the benefits of effective diversity management?
3. How can organizations deal with the “similarity-attraction” phenomenon? Left unchecked, what are the problems this tendency can cause?
4. What is the earnings gap? Who does it effect? What are the reasons behind the earnings gap?
5. Do you think that laws and regulations are successful in eliminating discrimination in the workplace? Why or why not?

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# Chapter 11: Managing a Customer Service Team

## *Learning Objectives*

After reading this chapter, you should be able to do the following:

1. Explain why it is important to measure service quality.
2. Identify obstacles to outstanding service.
3. Recommend tactics to improve service quality.
4. Identify the costs of poor customer service.

## **Customer Service Philosophy**

“If you’re looking to improve your customer experience, start by creating a customer service philosophy for your support team. Having a shared philosophy keeps everyone focused on the same goal and helps them understand the holistic approach to achieving that goal.”<sup>1</sup>

In an environment in which your front-line staff deal with an endless stream of unpredictable scenarios, having a strong philosophy helps empower team members, provides a coherent story to understand where those values come from, and sets the foundation for a customer-first strategy that’s proactive rather than reactive. No matter which employee a customer interacts with, they will experience the same delightful service that epitomizes your company values.

“A **customer service philosophy** is a shared mission for your support team, a set of guiding principles that ensure you’re upholding your core values with every customer interaction.”<sup>2</sup>

Generally, a customer service philosophy is composed of two parts: vision and values.

## Customer Service Vision

The first section of a customer service philosophy is a **customer service vision statement**, which Jeff Toister defines as “a statement that clearly defines the type of customer service employees are expected to provide.”<sup>3</sup>



*Photo by Blake Wisz on Unsplash*

## Customer Service Values

Your vision statement is followed by your team values. **Customer service values** impact the experience the customer receives and they help to define the personality and attitude the business is trying to put forth. Often companies offer training to employees on how to uphold these values. For example, “The staff at Apple retail stores are all screened and trained with a great deal of scrutiny before they make it out onto the sales floor to interact with customers. Apple’s Genius Training Student Workbook reveals a great deal about the extent to which the company goes to sufficiently train and produce the level of quality service anyone who’s visited an Apple store comes to expect. In fact, everything you’ve expected from the moment you arrive until the time you leave has been tediously thought out and most of it scripted. So what does A.P.P.L.E. really stand for when it comes to training staff on how to sell?”<sup>4</sup> It actually means:

**A**pproach customers with a personalized, warm welcome.

**P**olitely try to understand all the customer’s needs.

**P**resent a solution for the customer to take home today.

**L**isten for and resolve any issues or concerns.

**E**nd with a fond farewell and an invitation to return.

## Creating a Customer Service Philosophy for Your Team

Careful contemplation is the first step. Ask yourself some key questions. What is the purpose of your company? What is the role of customer service within your company? What experience should the customer have for your company to fulfill this role? What does this look like for your customer service representatives? What are your company’s core values and how are they

prioritized? What are the principles that should guide your employees who interact with customers daily? How will employees easily remember these principles?

There's no fixed format to a customer service philosophy. But having it down on paper — preferably a digestible one-pager — will allow your service reps to reread and internalize it. Take your answers from above and integrate them into a coherent piece.<sup>5</sup>

Although good customer service philosophies have a few things in common, no two should be the same. For a philosophy to succeed, it needs to align with your team's specific values, goals, and long-term vision for your relationship with customers.

## Develop Service Standards

**Service standards** are guidelines for employees to follow when interacting with customers. Do not make them too rigid or strict as not all standards will apply to every customer situation. This gives employees the flexibility to adapt to each customer's unique needs within a standard framework. Customer service guidelines should align with the company's brand.

Standards may be as simple as:

1. Make the customer feel welcome (e.g., greetings, body language)
2. Efficiently serve customer's needs (e.g., listen actively, ask probing questions, offer suggestions, take action)
3. Look for additional ways to serve the customer (e.g., ask if there is anything else you can do, share promotions or new opportunities)
4. End the customer interaction (e.g., thank the customer, follow up if needed, summarize what you have done if necessary)

"Starbucks strongly believes in meeting customer service standards. For example, employees are taught to put effort into the visual look of each drink. When you order a caramel macchiato at Starbucks, it has a precise pattern of caramel sauce. It has a lattice of seven vertical and horizontal lines with two full circles around it. They also pay attention to every detail in the store — from the lighting to the furniture, they're on point!"<sup>6</sup>

Provide your team with clear documentation regarding how to handle common customer service complaints, what language to use and to avoid, how to document service issues, guidelines for escalation, the lengths employees can go for customers, and where to go with any questions or problems. The more process and procedure you can put into place, the easier it will be for your team to understand how to act in a given situation.<sup>7</sup> With that said, you do not want the company processes and procedures to be overly cumbersome or complicated, otherwise, employees may have difficulty following them.



Photo by Andrea Piacquadio from Pexels

## Develop Customer Service Goals

Setting **customer service goals** can serve an important role in managing service teams. Set SMART goals (see Figure 10). Good goals focus attention on the right things, while poorly shaped goals focus attention on other things.

The service provided to customers, at every touchpoint, must be excellent and demand little effort from the customer in order to foster their loyalty. Customer service should make extra effort to ensure customer happiness and satisfaction. Customer interactions need to be pleasant experiences, customer problems must be resolved quickly and customers need to be totally confident in the services provided. Having a broad understanding of what excellent customer service looks like is a good step toward defining specific goals along with a plan that will lead to their attainment.<sup>8</sup>

**Figure 10: SMART Goals**  
Adapted from Peter Drucker's management by objectives concept

<b>S = Specific</b>	Make your goals specific and narrow for more effective planning
<b>M = Measurable</b>	Determine what evidence will prove you are making progress. Re-evaluate when necessary.
<b>A = Attainable</b>	Ensure you can reasonably accomplish your goal within a certain time frame given available resources. Stakeholders agree it is achievable.
<b>R = Relevant</b>	Goals should align with your values and long-term objectives.
<b>T = Timebound</b>	Set a realistic end date. This will help with task prioritization and motivation.

For example, a manager may set a goal for the service team to “increase customer satisfaction”, but this goal does not inform the team of how to obtain this goal or the specific amount of increase the manager is expecting. We might do better by saying, “increase customer satisfaction by 10% over the next month”. The manager and staff should know how customer satisfaction is measured and that a 10% increase is a realistic expectation. The manager would then provide strategies on how this might be done. As well, incentives might be set for the service team to encourage their best performance.

There are many goals for achieving excellent customer service. To view an illustrative list of measurable goals, click on the link: 25 examples of customer service .<sup>9</sup>

Watch the “What are SMART Goals? Quick Overview with 21 SMART Goals Examples” YouTube video below to learn about SMART goals.<sup>10</sup> Closed captioning is available on YouTube.



*One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=164#oembed-1>*

We cannot blame a wait staff who fails to increase the number of customers served in a given week if we later discover that due to having live entertainment all week, customers were sitting longer at their tables which resulted in fewer table changeovers, meaning staff were serving the same customers longer rather than serving new ones. The goals you set for your staff will impact how the staff perform and what they choose to focus on. So if speed is your objective then customer care may suffer as staff become obsessed with serving each customer quickly rather than serving each customer exceptionally. You need a balance between efficient service and quality, effective service, and you must set goals that will drive employees in that performance direction.

“Profit-focused goals can hurt the customer relationship and unrealistic goals demotivate and burn out employees. The goal structure should be set in a way that if your customer support representatives achieve their goals it will propel the support manager closer to meeting his or her goals. Which in turn moves the director of support closer to meeting their goals. Typically, the goals of the director will be broad and align with specific company objectives. The customer support manager’s goals will be positioned more towards operational objectives – make sure everything is running smoothly and efficiently. Customer support representatives will have more direct customer-centric goals like reducing response times, and improving resolution rates.”<sup>11</sup>

## Train Your Team

Investing the time and money in **customer service training** can prove to be an invaluable investment for businesses of diverse sectors and sizes. Teaching members of staff the competencies, knowledge, and skills required to increase customer satisfaction and therefore customer retention is a shrewd way for businesses to ultimately increase their sales

performance. Offering workplace training can provide staff with the necessary skills to strengthen their customer service skills, including communication, empathy, patience, and consistency, as well as adaptability. Whatever industry a business operates in, if it deals with customers, strong customer service skills are essential in ensuring customers remain loyal and a high level of customer retention is achieved. Workplace training that is focused on customer care will give employees valuable insight into how to develop and fine-tune customer service abilities. Such training will empower course participants to have the knowledge and confidence to provide effective solutions when they are faced with problems or difficult customers.<sup>12</sup>

First off, hire the right people. During an interview tell potential employees what your customer service philosophy is and share your company's missions, values, and goals. Then test applicants to see if they are a good fit.

Once hired, orient your new hire to the company and to the team of employees they will work with. Let them observe how things are done and how customer issues are resolved. Provide information on the company's mission, vision, values, and goals, and explain how your department/area fits into the overall company goals.



*Photo by Tbel Abuseridze on Unsplash*

Provide specific training on how to serve customers, even the difficult ones. Many service representatives do not know how to recover from a bad service situation with an upset or angry customer. A new employee can work alongside an experienced employee for a while and learn how to do things that will delight customers as well as support company goals. Such programs are often termed, coaching, mentoring, on-the-job training, or job shadowing. Training may entail a more structured form such as classes teaching new employees how to use customer relationship management software, use phone systems; deal with service breakdown and service recovery; learn how to provide value to customers to encourage long-term loyalty, learn how to upsell or cross-sell in a way that customers will value; learn about the company vision, mission and goals; or manage social media platforms to serve and interact with customers.

Watch the “Service Recovery – Look, Sound, Feel” YouTube video below to learn about effective service recovery.<sup>13</sup> Closed captioning is available on YouTube.



*One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=164#oembed-2>*

The Disney Institute does a great job at training Disney employees, so much so, that they offer on-demand online training to other companies who may wish to provide customer service training to

their own employees. Disney's website states, "In this on-demand course, our team will highlight how excellent service is the result of truly understanding your customer expectations and how to put the right service standards in place to exceed them. Begin to learn not only how to start to differentiate your organization from competitors, but how to build customer loyalty through quality service. In this on-demand course, you will learn to:

- Assess and improve your organization's commitment to quality service
- Differentiate and elevate your service to become a provider of choice
- Design standards for quality service and create a consistent service experience
- Gauge the needs, wants, stereotypes, and emotions of your customers at an individual level
- Understand the processes necessary to develop a workplace culture that consistently delivers exceptional service
- Recover effectively from a service failure and turn it into an opportunity to strengthen customer relations"<sup>14</sup>

Of course, there are many other training programs a company may utilize, such as those offered in LinkedIn Learning or those created in-house that are customized to the way your particular company goes about performing operations and serving customers.

## Evaluate Service Quality

As a service manager, you continually need to be evaluating the quality of customer care your team provides. **Key performance indicators (KPIs)** measure how effectively a company is achieving its goals against a set of targets, objectives, or industry peers. Organizations use KPIs at multiple levels to evaluate their success in reaching targets.

Listed below are some of the ways in which you might measure service quality.

**The Net Promoter Score (NPS)** is a customer loyalty metric that businesses use to gauge how their customers feel about them. It measures your customers' willingness to recommend your company, product, or service to others. Companies with a high NPS are more likely to achieve long-term profitable growth.

**Customer retention rate** is another way to evaluate service quality. "Even a 1% improvement in retention means a 5% profit increase per customer. Think about that. It's easy to see why every organization must do what they can to maximize customer retention."<sup>15</sup>

**Customer Satisfaction Score (CSAT) Surveys.** Obtaining customer feedback through customer satisfaction surveys is one way to gain customer insights. Surveying employees and asking for suggestions on customer service processes and procedures may lead to customer service improvements. Customer Satisfaction Score (CSAT) is a customer loyalty metric used by companies to gauge how satisfied a customer is with a particular interaction or overall experience.

Watch the “How to Use the Customer Satisfaction Score (CSAT) Metric” YouTube video below to learn how to use customer satisfaction scores.<sup>16</sup> Closed captioning is available on YouTube.



*One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=164#oembed-3>*

**Mystery shoppers and observation.** Simply observing your team in action can help you identify common issues. Having a mystery shopper experience the service and processes your company provides and then reporting this experience back to you can help you understand where service breakdowns may occur.

**Customer engagement metrics.** Customer engagement starts from the first touch point and incorporates subsequent interactions, including the time customers spend with your brand and the actions they take throughout their journey. Customer engagement metrics are effective in measuring service accessibility and the quality of customer experience.<sup>17</sup>

**Social media monitoring.** Monitoring tools help understand what people are saying about you on social media. Insights like this paint a richer picture than simply relying on traditional media. Available in the market are the likes of Keyhole, Addict-o-Matic, CyberAlert, Sysomos among others.<sup>18</sup>

## Identify Obstacles to Outstanding Service

There can be many obstacles creating barriers to your ability to provide excellent customer service. Some of which include the following.

### Ineffective Employee Incentives

As a manager, you must ensure incentives focus employees on the right performance. Incentives can be an obstacle to good performance when employees take action to gain incentives at the expense of doing what is right or good for the customer. Have you ever wondered about the motivation of the auto-mechanic, when they tell you your car needs more work than you anticipated? What about when the salesperson sounds very convincing as they try to sell you more than you think you need? Employees may be tempted to bend the rules, working against the concepts of good quality service, in order to win incentives. Ensure incentives are set up to encourage better service and not encourage unethical behavior.

## Inefficient or Ineffective Service Systems

Sometimes service systems just don't work; maybe it's cumbersome processes customers must follow, unreliable service (works intermittently), poor quality products, or procedures that just don't work. Often customer service representatives get blamed by customers for these things, but in reality, these things are beyond the scope of the service representatives' control. With that said, certainly, service representatives should alert their managers when they observe such issues. For example, if several customers have complained about the same thing, then it might be time to change it. As a manager, if your employees have informed you of processes that are not working you should examine them and consider how to make improvements.

## Ineffective Policies, Processes, or Procedures

A lack of policies, processes, or procedures can also be an obstacle to providing great customer service. If these are missing or lacking in structure, customer service agents will not be guided in providing exceptional service. If the company does not clearly communicate its customer service vision and provide the tools for employees to do their job, then the lack of processes and procedures will become an obstacle. On the other hand, if there are too many policies, processes, or procedures agents may be restricted in offering the best service they can. In either of these cases, customer service managers should work with the cross-functional management team to develop clear guidelines for policies, processes, and procedures and communicate those to employees in order to provide exceptional service.

Watch the "How to Avoid Roadblocks to Great Customer Service" YouTube video below to learn about avoiding roadblocks to great customer service.<sup>19</sup> Closed captioning is available on YouTube.



*One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=164#oembed-4>*

## Lack of Communication

A lack of communication or support from other departments can be an obstacle to providing great customer service. Often the front-line employee, those facing the customer, need support from other departments within an organization. This means depending on others within the company to do their jobs and to do a quality job. Not every employee is dedicated to the company or performs quality work. As a manager, if your employees are having difficulty getting what they need from other departments you should step in and connect with the other department's manager to discuss what can be done to make working together easier and more effective. They

may not care about what is happening with your team, but they should care about fixing a problem that is costing the company money and customers.

## Unanticipated Customer Demand

Customer demand can exceed what was expected or the number of customers can be far greater than anticipated which can create an obstacle to providing excellent customer service. If customer demand is so great that your company runs out of products or not everyone can be served efficiently, then customers may become dissatisfied. If your company gets far more customers than anticipated there may not be enough staff on hand to serve each customer, again, this can lead to customer loss and dissatisfaction. Managers need to schedule enough employees to serve all customers and serve them through various channels. Managers may forecast demand by reviewing past trends or patterns in sales and service. They may anticipate demand by analyzing the environment, for example, if there is an event in town bringing in vacationers then maybe the company will require additional staff on hand that week. Managers may also hire contingent workers, or workers they can hire when short-staffed on an ad-hoc basis, but having them trained may be an issue.

## Improve Service Quality

According to this great quote from Sam Walton, ***“There is only one boss. The customer – and he can fire everybody in the company from the chairman on down, simply by spending his money somewhere else.”*** Great customer service is just the first stage, but by making sure you build in analytics and other ways of measuring this success, their hard work and effort can be quantified and your outstanding customer support team’s progress can be measured.<sup>20</sup>

Some of the things that annoy customers so much that they switch to another company, include:<sup>21</sup>

- Unhelpful or rude staff. **68%** of customers believe the key to great customer service is a polite customer service representative. — American Express
- Being passed around to multiple agents. **72%** of consumers see having to explain their problem to multiple people as poor customer service. – Dimensional Research
- Being kept on hold for too long. Consumers will wait on hold for an average of **11 minutes** before hanging up. – Channels
- Feeling unappreciated. **48%** of consumers expect specialized treatment for being a good customer. – Accenture
- Ignoring customers’ feedback. **52%** of people around the globe believe that companies need to take action on feedback provided by their customers. – Microsoft
- Not being present on the channels your customers are. **68%** of consumers say it increases their perception of a brand when companies send them proactive customer service notifications. – Microsoft

## Empower Your Employees

One way to improve service quality is to **empower your employees**. Empowering employees means giving them the authority to make some decisions without needing approval. This way they can make decisions to resolve customer issues without delay or making the customer wait. You will eliminate the “let me ask my boss” barrier by handing over a level of decision-making power to front-line employees. You also need to empower employees by giving them access to the data and systems they need in order to solve customer problems. Ensure boundaries are clearly defined, this may mean that an employee may be given the authority and be empowered to correct a customer issue up to a certain dollar amount.

Of course, to do this well, supervisors must be trained on how much power to give employees and in which areas; then, these supervisors coach their employees on making win-win decisions for their customers and company. When employees have the authority to solve customer problems, customers are served more quickly and receive more efficient and effective service thereby meeting or exceeding customer expectations. Customers who are satisfied with the service they receive become loyal and may even refer other customers.

## Make Doing Business Easy

Make it easy for customers to do business with you. If it is too cumbersome or too complex for customers to do business with you, they will go elsewhere. That might mean making your website easier to read and use, offering a delivery option, or accepting several different payment methods. Make the processes customers use easy and clear. Customers who feel they waste too much time standing in lines, being transferred from one staff to another, waiting on answers, or sifting through web pages and papers to figure out what they need to do to return an item will certainly become frustrated and possibly take their business and recommendations elsewhere.

## Provide Employees with Feedback and Training

Train employees as needed and provide meaningful feedback in a constructive manner on a regular basis to employees. Feedback should be thoughtful whether you are providing encouragement on a job well done, or providing constructive feedback for a performance correction. You may need to offer specialized training when you observe your team is lacking skills in a particular area and this lack of skill is negatively affecting the quality of service being delivered. Orientation training or onboarding is not the only time you need to train your employees; when systems or procedures are updated, employees should be trained so they are able to offer the best customer service possible. Communication between management and employees is key in ensuring employees understand what is expected of them, what the company policies and procedures are, and how to serve customers in a way the company wants them to.

## Implement an Effective Rewards System

Reward your team for providing excellent service. A customer service incentive program can improve employee morale and job satisfaction, but there are some drawbacks you need to steer clear of. Focusing on monetary rewards won't necessarily have the results you expect. It might look good initially but often ends up creating a competitive environment and a team pitted against each other. Implementing a reward system that aligns with clearly defined goals is the best approach. When it comes to monetary rewards, many companies call this compensation based on performance results. These monetary rewards are targeted toward individuals meeting performance targets. On the other hand, monetary rewards that incite competition have different effects. For example, if you reward the person who sells the most product, then only one person on the team wins. This sets up the team to work against each other which has negative effects on team collaboration. Instead, you might have a threshold that when met, you reward your employees; in this type of system, several employees might meet the threshold. You also need to make the threshold attainable; something so difficult, that no one can attain the reward, will only have negative effects on employee motivation.

“With previous generations, employers focused on monetary rewards but the expectation of a healthy work-life balance by the millennial generation makes cash rewards less appealing. Instead, time off and experiences are more highly valued which is a boon for employees and employers. Rather than offering bonuses for rewards programs, consider offering a long lunch, a shopping spree, a day off, a certificate of accomplishment posted in an area everyone can view, or an afternoon team building with the company. Time is more highly valued by employees and increases overall productivity for the company by allowing employees time to refresh. Implement rewards that value time over cash.”<sup>22</sup>

“One reason that businesses cite not implementing a reward system for employee performance is temporary compliance. An employee of the month program may increase productivity the first month, but interest quickly dwindles. All the work of creating that program provides only short-term benefits. To avoid employees lapsing back into pre-reward productivity, it's important for employers to keep the incentive programs new and exciting. Change up employee reward systems quarterly or yearly to reignite excitement about the plan.”<sup>23</sup>

## Evaluate Your Personal Management Skills

You need to develop and improve your managerial skills on an ongoing basis as your career develops and as you meet new managerial challenges. Whether you manage a department or a project team, it is important to know how to get the work done right. You must develop not only your technical skills but your management skills as well. Delegating, motivating, communicating, and understanding team dynamics are some of the key skills needed. With those skills, along with patience and a strong sense of balance, you can become a very effective manager.<sup>24</sup>

A good manager sets their employees up for success. They provide the time and tools to accomplish tasks. They often have experience in the field of work they are supervising. They are capable of solving problems, managing time and money, and inspiring employees to perform optimally. A manager is responsible for the effective and efficient operations within a company, department, or team. A manager who is not able to create efficient schedules, keep employees motivated, or manage time and money will not perform optimally and may impede the ability of their subordinates to do the same. A bad manager may be someone who gives employees directives without any explanation, tools, or context. A good manager supports employees, chooses appropriate projects, and allocates resources (people, time, money, materials, and equipment) where needed and when needed in a reasonable manner to support the company goals. Management skills are important to lead a team and move the organization in the right direction. If the manager has weak management skills customer service quality may suffer. To be a good manager it is important to have skills such as planning, organizing, leading, and controlling. Managers need to create effective strategies, have good communication skills, be able to make decisions responsibly, be able to solve problems whenever they arise, be able to manage time effectively, be able to manage projects effectively, have conceptual skills, be able to motivate employees to lead their team, etc.

Some new managers are coached or mentored for the first few months on the job. Others take training courses in managing people and projects, emotional intelligence, negotiation, handling difficult people, sales, and management. To be a manager who is great at their job, you will need to:

- Learn about the company's vision, mission, goals, and values, and understand how your specific department/area supports the overall company goals.
- Learn what is expected of you and your department/area in terms of output, results, interactions with customers, and daily, weekly, and monthly reporting.
- Learn how to communicate well in all situations, including when you have to deliver negative information to an employee or customer, when you need to negotiate a contract, or when you need to persuade someone to do something. There are many books and courses on these subjects.
- Learn how to motivate others. What does it take to make employees want to work to their best ability? Often, recognition, rewards, involvement, and knowing that their manager cares about them and supports them in their jobs is enough.
- Learn how to manage projects. Everything that gets done in the workplace is a project, small or large.



*Photo by Smartworks Coworking on Unsplash*

## Optimize Service Delivery

In a highly competitive market, service-based businesses need to set themselves apart from their competitors. Listed below are a few ways to drive growth in your company by committing to exceptional service delivery:

### Communicate with Customers

When it comes to customers, there's no such thing as over-communication — your clients feel more comfortable when they know what's going on. That being said, the amount of communication is not so imperative as the timeliness, its context, and its ability to clearly identify the value added to the client. In a world of constant connectivity, your ability to cut through the flood of subpar information with quality and timely answers can go a long way.<sup>25</sup>

### Set Customer Expectations

Define for customers what level of service they can expect from your company. Keep your message consistent across channels and train staff to deliver service to meet the expectations the company has set. One example might be turn-around time. If you promise to get back to a customer within 24 hours make sure you do; even when you don't have the answer, you can follow up to let the customer know you are still working on the problem. Under promise and over deliver is one way to exceed customer expectations. Do not promise to do something if you are not sure you can, this may result in a dissatisfied customer. You might say, "We will make every attempt to deliver by Friday, but I cannot promise it will arrive on time. I will try my best." Then if the package arrives on Thursday or Friday you have delighted the customer.

### Automate When Possible

Offer customers a choice of full-serve or self-serve processes. Today we see online shopping, self-checkouts at retailers and grocery stores, and online accounts such as Amazon which allow customers to customize their options and subscriptions. Automation, when working optimally, can increase customer satisfaction, streamline processes and services, and reduce the workload on employees. Ensure automated systems are not difficult to use and are working optimally, otherwise, your customers may become dissatisfied and may decide to do business with your competitor instead. Shipping processes may be automated as well, and it is important to ensure speedy delivery because if your customers can get the item from your competitor faster, they just might. Implementing automated systems may reduce costs for a company in the long run, but there will always be some customers who prefer personalized service provided by a real, live

person. Automation comes with a high upfront cost but usually increases productivity so in the long run saves money and increases revenue.<sup>26</sup>

## Schedule Employees Effectively

Service organizations need to schedule employees in accordance with forecasted customer demand. For example, during holidays stores might anticipate an influx of customers and plan to have additional cashiers and customer service employees on the schedule. The company does not want too many employees working at one time when it leads to some employees standing around with nothing much to do. This is a waste of resources and costs the company money, it may also lower employee morale and motivation to do their best work. The company also does not want too few employees scheduled if they are so busy that customer service wains due to being rushed, exhausted, and frustrated. Situations such as these may lead to higher turnover rates (employees quitting), increased customer dissatisfaction, lower employee morale, and negative corporate culture. Managers should schedule resources (employees, equipment, raw materials) in accordance with current projects and sales forecasts, and ensure that no resource is over-or underutilized.

## Foster a Strong Culture

After establishing a feasible service concept, there is no other factor so instrumental to the success of a service organization as its culture. Employees should be aligned when it comes to a specific set of overarching principles — and, while methodology is crucial to service delivery, this should feel more like a philosophy. Don't take it for granted that your culture is strictly internal — it shows up in your service delivery, your methodology, and your relationships and interactions with customers. The better employees understand the company's service vision, the better it translates to customers. More often than not, your customers will know if you and your employees aren't on the same page.<sup>27</sup>

## Costs of Poor Customer Service

Bad customer service costs businesses \$338 billion in revenue every year, globally. *That's* the real cost of bad customer service.<sup>28</sup>

Not listening to customers is one of the biggest mistakes companies can make. It may lead to angry customers, lost business, and damaged company reputation. In order to satisfy customers, companies have to keep up with the latest technological advances and train their staff on how to meet or exceed customer expectations. Social media is growing in popularity and customers will use it to talk about their customer service experiences, good and bad. Often disgruntled customers

do not tell you or your employees directly, instead, they complain to friends, family, coworkers, and on social media about your company, products, and services.

Watch the “How Poor Customer Service Can Lead to Big Losses!” YouTube video below to learn how bad customer service can cost a company money.<sup>29</sup> Closed captioning is available on YouTube.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=164#oembed-5>

## Key Takeaways

1. A **customer service philosophy** is a shared mission for your support team, a set of guiding principles that ensure you're upholding your core values with every customer interaction.
2. The first section of a customer service philosophy is a **customer service vision statement**, which Jeff Toister defines as “a statement that clearly defines the type of customer service employees are expected to provide”.
3. Your vision statement is followed by your team values. **Customer service values** impact the experience the customer receives and they help to define the personality and attitude the business is trying to put forth. Often companies offer training to employees on how to uphold these values.
4. **Service standards** are guidelines for employees to follow when interacting with customers. Do not make them too rigid or strict as not all standards will apply to every customer situation. This gives employees the flexibility to adapt to each customer's unique needs within a standard framework. Customer service guidelines should align with the company's brand.
5. Setting **customer service goals** can serve an important role in managing service teams. Set SMART goals. Good goals focus attention on the right things, while poorly shaped goals focus attention on other things.
6. **Key performance indicators (KPIs)** measure how effectively a company is achieving its goals against a set of targets, objectives, or industry peers.
7. Ensure **employee incentives** are set up to encourage better service and not encourage unethical behaviour.
8. Sometimes **service systems just don't work**; maybe it's cumbersome processes customers must follow, unreliable service (works sometimes), poor quality products, or procedures that just don't work.
9. A lack of, or too many, **policies, processes, or procedures** can also be an obstacle to providing great customer service.
10. A **lack of communication** or support from other departments can be an obstacle to providing great customer service.

11. **Unanticipated customer demand** can exceed what was expected or the number of customers can be far greater than anticipated which can create an obstacle to providing excellent customer service.
12. **Empowering employees** means giving them the authority to make some decisions without needing approval.
13. **Make it easy** for customers to do business with you. If it is too cumbersome or too complex for customers to do business with you, they will go elsewhere.
14. **Train employees** as needed and **provide meaningful feedback** in a constructive manner on a regular basis to employees.
15. You need to develop and **improve your managerial skills** on an ongoing basis as your career develops and as you meet new managerial challenges.
16. When it comes to customers, there's no such thing as **over-communication** — your clients feel more comfortable when they know what's going on.
17. Define for customers what level of service they can **expect** from your company.
18. **Automation** comes with a high upfront cost but usually increases productivity so in the long run saves money and increases revenue.
19. Service organizations need to **schedule employees** in accordance with forecasted customer demand.
20. After establishing a feasible service concept, there is no other factor so instrumental to the success of a service organization as its **culture**.
21. **Bad customer service** costs businesses \$338 billion in revenue every year, globally.

## End-of-Chapter Exercises

1. **Service Philosophy.** Search the Internet for “customer service philosophy” or “Examples of customer service philosophy” or visit a specific company website and locate their customer service philosophy. Compare a few examples and identify things they may have in common. What are three of the most prevalent concepts in organizations' customer service philosophies?
2. **SMART Goals.** Practice setting a SMART goal. Maybe you want to lose weight, quit smoking, get a part-time job, or make the people close to you happier. Set a SMART goal to help you get started.
3. **Management Skills Quiz.** Take a quiz from MindTools to see if you have good management skills.
4. **Jobs.** Visit Best Job Interview to learn more about the tasks, duties, responsibilities, education, experience, skills, and competencies one must have in order to obtain a customer service management position. Consider how you might grow and develop your own skills so that one day you may become a team manager. Are you taking courses currently in college or university that may help you develop some of the required skills and abilities to be a team manager? Where else might you develop some of these skills?
5. **Obstacles.** Consider the obstacles to outstanding customer service discussed in this chapter. Can you think of, or research, three additional service obstacles you might encounter? What could a

service manager do to overcome those obstacles? Discuss with the class and/or professor.

6. **Training.** Assume you are the customer service manager in a large retailer store such as Walmart or Loblaws. You will be developing a training program for your customer service employees. Conduct a bit of research about employee training methods and jot down some notes on how you will train your team. Will you offer in-person training? If so, how many days? Will you offer online courses? Will you offer mentoring or coaching programs? What are three concepts you will teach your team? Discuss with the class and your professor.
7. **Incentive Programs.** Search the Internet for “employee incentive program” and review a few. Assume you are a manager for a mobile phone service provider, Koodo or Fido or such. What type of employee incentive program would you set up? Why?

## Self-Check Exercise – SMART Goals



*An interactive H5P element has been excluded from this version of the text. You can view it online here:*

<https://customerserviceengagement.pressbooks.sunycreate.cloud/?p=164#h5p-11>

## Additional Resources

1. LinkedIn Learning Customer Service Training
2. I was Seduced by Exceptional Customer Service
3. 7 Management Practices that Can Improve Employee Productivity
4. 10 Barriers to Outstanding Customer Service
5. How to Write a Customer Service Vision Statement
6. How to Evaluate Customer Service
7. 10 Phrases to Avoid in Customer Service, YouTube Video

8. What Are The Top 11 Customer Service KPI and Metrics to Gauge in 2022
9. 21 Goals for Customer Service Teams to Strive for in 2022
10. Improve Your Customer Experience with Customer Journey Mapping, YouTube Video

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(Note: This reference list was produced using the auto-footnote and media citation features of Pressbooks; therefore, the in-text citations are not displayed in APA style).

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