
JIM BAGNOLA, The Leadership Group

International Speaker, Corporate Educator, Executive Coach

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Takeaways

These TIPS are from Jim Bagnola's customer relations workshop "Who do you really work for, anyway?" held at the Vancouver Board of Trade. If you have questions for Jim Bagnola, you may send an email from the Enlightened Communications website: encomm.ca and we will respond within two business days.

Ideas to improve your customer experience:

1. Under promise, over deliver.
2. The answer is always "Yes", and sometimes we say: "We don't do that, but we can get it done for you."
3. We call the customer and ask what we are doing well and what could we do better. We ask them what they think our competitors are doing better.
4. I always get a snapshot of the customer's latest dealings with us from all angles before I visit them.
5. We ensure we set a customer expectation and follow up on that expectation.
6. We provide call assessment training and coaching by randomly recording calls on customer interactions and then evaluating them against set criteria that covers professionalism, tone, intention to help, listening abilities, and on opening and closing the call.
7. Personalize every communication so it is relevant to the customer.
8. We do follow up phone calls with our customers after a service call to ensure their problem was resolved.
9. Make all employees feel useful and needed.
10. Find out what they want, not what I think they want. Specify our action to the individual's needs.

11. Use a client survey after every project is completed. Circulate the results.
12. Personalization: each customer works directly with a payroll administrator who is assigned to them and is aware of their needs so service is customized. Each payroll administrator is coached on the relationship and on the level of service to provide the customer.
13. We aim to show sincerity and a general concern regardless of whether we can solve all the guest's problems.
14. Try to employ a "both win" culture, which is a cooperative environment with mutual trust rather than a competitive environment.
15. Smile, remember what the customer purchased on their last visit and ask how it was. Try and remember their name. If they are first-time customers we give them a free cup of tea and thank them for coming in. We also offer tea on the house if they purchase 100 grams of tea, or if they buy a latte they can choose their own sweet on the house.
16. We personalize thank-you notes for speakers and guests.
17. Follow through on commitments made to clients.
18. Treat customers like they are guests.
19. Be conscientious: be careful about what I am saying; be on time, and always follow up after a meeting or appointment.
20. Vice-president of department randomly calls customers back. Customer surveys on products are followed up by our Discover Team to identify dissatisfaction.
21. Our website has a feedback mechanism where we can answer their suggestions about how to improve our products and services. Customers can then vote on suggestions and if they helped. Discover Team then calls every customer who writes anything less than "Satisfied" on the survey to see what we need to do to turn them into enthusiastic evangelists about our firm.
22. We listen to customers when developing software and then base our development on their feedback and suggestions.
23. We use customer satisfaction surveys.
24. We always respond to inquiries in a timely manner. If the response is by email, we call them directly and make it personal.

25. We problem-solve rather than “pass the buck”.
26. Try your best to understand the customer’s situation by putting yourself in their shoes.
27. Provide a free business book to new customers about tips to be successful. Use thank-you cards, check-in coffees and lunch. Send email newsletters to help them run their business. Give sincere, immediate customer service that creates a “wow” experience.
28. We follow up a client’s request within an hour or two, even if we don’t have an answer we let them know we are working on their request.
29. Ask the customer: “What does success look like to you?” Then we create a proposal to meet and exceed those needs.
30. I listen to what the guest or customer is saying, because most of the time people are not listening closely.
31. Get the customer involved with a telephone questionnaire and find out what we can do to improve services.
32. Provide updates on the progress of their order based on a schedule they select.
33. We train knowledgeable staff so customers don’t have to visit several departments.
34. Front line sales staff make small credit adjustments on customer accounts. Account managers carry car stock in the field to replace damaged or dated shelf stock.
35. Immediately call back any dissatisfied customer survey response within a day, which starts the relationship off on the right foot.
36. Give relevant information as soon as possible to address any objections.
37. Provide VIP customers with a tour of the head office and information on future products. Create a dinner with the president. Presentation by R&D and lead engineers.
38. Turn our customer into our sales force. Ask them how we can service them better. Customer service is about the little things not the big things, which makes all the difference.
39. We will try to differentiate from our competitors.

40. We want to invite Jim Bagnola to talk to our managers and inspire them to initiate changes in the corporate culture.
41. Call every customer back who returned a negative survey score.
42. Improve the care of our employees.
43. "If I see a problem, I own it."
44. Work with employees to take the extra step in assisting our customers.
45. Let all employees have a chance to talk to our customers.
46. Find out what our customers experience working with us.
47. Meet with all staff to discuss and compare experiences with customers.
48. Have open discussions on how different situations are being handled and what has worked best. Discuss positive outcomes and share kudos.
49. Increase the interaction between staff and guests.
50. Change level of engagement by employees and eliminate disengaged employees.
51. Create an opportunity for customers to be interactive and have a choice by creating an herb garden so they pick their own herbs for their tea.
52. Don't bombard customers with information. Personalize the experience and provide thank you notes. Pickup guest's note pads if they leave them behind.
53. Act on the customer's suggestions for the space they utilize to enjoy their tea.
54. Make their experience memorable.
55. Create a welcome team to call new customers and ensure they have a positive experience.
56. Ensure employee satisfaction by providing monthly feedback on what I appreciate and what they feel could be improved.
57. Listen more carefully to customer's needs and wants.
58. See the customer as a guest.
59. Provide online information and training webinars.

60. Create relationship-building activities such as golf.
61. Recognize what world class service is, and encourage all employees to provide this level of service.
62. Leave customers with a long-lasting positive experience.
63. Involve employees in customer satisfaction surveys.
64. Make it easier to deal with small issues in a timely manner instead of having another department complete the request.
65. Have a dinner program to share best practices.

Ideas to increase employee satisfaction:

1. A Fitness Allowance of \$1000 is given to each employee to spend yearly on any fitness-related experience.
2. Every day we tell them what they did right.
3. I recognize my assistant and acknowledge how important she is to my success. Each year I give a bonus from me, not from the organization.
4. We offer profit sharing and monthly lunches.
5. Create monthly one-on-one meetings.
6. We reward and appreciate employees and have career development processes.
7. Empower our employees to work with our customers to provide solutions for their technical problems.
8. We challenge our employees outside their comfort zone.
9. Have a positive attitude so employees follow us and have a positive attitude as well.
10. We strongly emphasize individually-tailored career development funded by our company.
11. Supply coffee, tea and fresh fruit weekly. Provide compensation such as RRSP matching funds and tuition reimbursement.
12. Take time to listen to each employee's opinion so they feel our sense of care, which makes them feel like a person and not employee #00111.

13. Personalize all correspondence to reflect the relationship and individual needs of each customer.
14. Have frequent awards for achievement and recognition. Organize company events to increase level of fun.
15. Health and fitness allowance, flexible work arrangements, mentorship teams, team dinners in busy season, and a fun newsletter.
16. Smile and treat employees like they are the manager.
17. Encourage employees to be themselves. Trust them, listen to them and give them freedom.
18. Weekly meetings to catch up and vent frustration.
19. We have an open door policy so they are not afraid to approach us.
20. Give employees the independence to get the job done, which includes communicating with clients. Employees feel more valued now.
21. Give employees the freedom to make their own choices and decisions with customers. For example, a lady came into our store late for a meeting, so our employee gave her tea on the house and redirected her to the meeting quickly. The customer came back with a bouquet of flowers to thank the employee.
22. Weekly meetings and daily huddles on what is happening. Leadership without a relationship equals rebellion.
23. Clean up the office and say good bye to the dead wood.
24. Celebrate employees' professional accomplishments.
25. Schedule consistent one-on-one monthly meetings to listen and provide feedback on ideas and suggestions.
26. Rewards programs that recognize employees who exceed customer expectations. We present an award or gift certificate on the spot.
27. Get employee involvement in the decision-making process or improvement initiative. Solicit feedback and follow up on their suggestions letting employee know why a suggestion or decision will or will not be implemented.
28. Solicit feedback on decisions that affect their work. Get together weekly for lunch.
29. Implement fitness subsidy program with flexible work time.

30. Be willing to help co-workers with a smile and pleasant attitude.
31. Treat everyone equally regardless of their position.
32. Provide employees with the resources and support to give them autonomy.
33. Gifts cards for employees.
34. Morning meetings to acknowledge and engage all employees.
35. Take time to see how things are progressing.
36. Ensure that employees are empowered with the tools to solve problems. Ask for input in solving client issues together. This is an opportunity to learn from one another.
37. Connect on a personal, compassionate level so they feel they are a person and their contribution and efforts are really valued.
38. Work together as a team to meet our goals.
39. Thank them at the end of the day for their contribution.
40. Take time to listen to employees and implement any changes possible.
41. Walk the floor and talk with staff. Hold monthly social activities.
42. Company sponsorship of employee / family health / sport / charitable activities.
43. Ask and give relevant training.
44. Empower employees. Encourage them to generate ideas, run with them and share their success versus management taking credit for it.

New action ideas generated by participants of Jim Bagnola's seminar to improve employee satisfaction:

1. Provide more positive feedback.
2. Get employees to tell me what I did wrong today.
3. Encourage management to buy into everything.
4. Request employees to send me information on what they appreciate as well as areas for improvement.

5. Create an account manager's role to provide initial and on-going engagement with our customers.
6. Acknowledge and recognize our employees for a job well done and for going the extra mile.
7. Help employees improve their skills.
8. Put myself in their shoes to understand things from their perspective and why they react the way they do in certain situations. Then I can react better to their needs.
9. Increase efforts to ensure individual employees are given projects they are most interested in doing.
10. Foster employee growth. Empower them to attend at least one company-paid payroll workshop of their choice each year. This will increase network exposure and the opportunity to bring something back to the office.
11. To allow employees to move temporarily from one department to another to better understand the job duties of others.
12. Apply Jim Bagnola's "supermarket walk through approach" during employee performance evaluations.
13. Provide flexibility in working hours such as working from home.
14. Empower employees and allow them to do whatever it takes to satisfy a customer, including free tickets, demo software, etc.
15. Show appreciation for the hard work that is done when I am not present.
16. Provide anonymous surveys of management and staff.
17. Post a new job for employees.
18. Share feedback from clients with employees.
19. Solicit more feedback directly from employees on how we can improve our customer experience.
20. Get feedback from employees on areas for improvement in my one-to-one meetings. Let every employee know what I appreciate about them every single month.
21. Implement performance-based bonuses and a profit-sharing plan.

22. Arrange weekly company-wide meetings to announce or share updates about the company and individuals.
23. Have a positive and open attitude towards employee's ideas and evaluate them seriously before deciding to implement them.
24. Organize fun social days.
25. Create a good feedback loop.
26. Provide business cards for everyone and hold creative brainstorming sessions.
27. Challenge their skill set and knowledge daily.
28. Ask employees what they need to succeed and help them achieve their goals. Develop a partnership for our mutual success.
29. Praise employees for a job well done.
30. Teleconference to connect us together.
31. Give employees better training and direction to allow them to do the job. Ask associates what they need and help them obtain it.
32. Reintroduce the idea of forming partnerships with employees and with our customers.
33. Ask the employee to share positive, relevant training with other employees.

HIRING JIM:

Jim Bagnola provides engaging and lively keynotes and workshops to address a variety of your organization's needs, including:

- Change Management
- Leading is Everybody's Business
- Performance and Energy Management: The Leader as Coach, Transforming Talent into Performance
- Becoming a Professional Human Being
- Self-Management: Managing Stress, the Never-Ending Balancing Act
- Team Management: Appreciating the Many Faces of Intelligence.