

# Customer Service

Establishing Friendly, Professional  
and Helpful Relationships



# Outcomes/Objectives

## ● The Learner Will:

- > Be able to define customer service
- > Be able to identify the customer
- > Understand how the customer perceives the service is equal to the importance of the quality of service
- > Be able to build therapeutic rapport
- > Practice active listening skills
- > Establish expectations and boundaries
- > Follow the 8 simple rules for good customer service

# What is Customer Service?

- The process for ensuring customer satisfaction
- Customer service is the act of taking care of the customer's needs by providing and delivering professional, helpful, high quality service and assistance before, during, and after the customer's requirements are met (Paul McKinny)

# Customer Service

- Think about a situation you have been in during which you experienced either good or bad customer service.
- What is the result of bad customer service (Culture of a System)?

# Who Are Your Customers?

- Identify a list of your customers

# Who Are Our Customers?

- Are individuals with names and feelings
- Are individuals who are essentially good and usually do the best they can
- Are important to me
- Are not people I argue with
- Are people that I respect in every interaction
- Are not interruptions of our work ... they are my work
- Are the reasons I have a job

- You are serving a customer, not a life sentence. Learn how to enjoy your work. ~ *Laurie McIntosh*
- Your most unhappy customers are your greatest source of learning. ~ *Bill Gates*

# Finish This Sentence

- The customer is always...
  - the customer
- > There is no right or wrong, it's all about how the customer perceives the interaction



# The Customer's Perception

- What the customer perceives is what is real to him/her.
- The 7/11 Rule

- The 7/11 Rule

- In the first 7 seconds of contact a customer forms 11 impressions about you:

- > 1. Friendly
- > 2. Attractive
- > 3. Professional
- > 4. Knowledgeable
- > 5. Empathetic
- > 6. Credible
- > 7. Confident
- > 8. Clean
- > 9. Courteous
- > 10. Responsive
- > 11. Helpful

# Customer Perception

- From those 11 impressions the customer will decide one of 3 things:
  - > You like me;
  - > You are indifferent to me;
  - > You like me...and I will be your loyal customer.

# The Customer's Perception

- Begins with the elements of establishing a relationship
  - > Orienting the person to the service
  - > Establishing therapeutic rapport
  - > Establishing expectations and boundaries

# Orienting

- Introduce the service
- Informing the person/family served of the *purpose and nature of the service*:
  - > Case Manager's responsibility in supporting, encouraging, facilitating planning, and informing consumers relative to their making choices and accessing services
  - > Consumer's responsibility for his/her choices and resulting consequences

# Establishing a Relationship

## Developing Rapport

- Empathy: Accurate Listening
- Warmth: Unconditional Positive Regard
- Congruence: Genuineness

# Establishing a Relationship

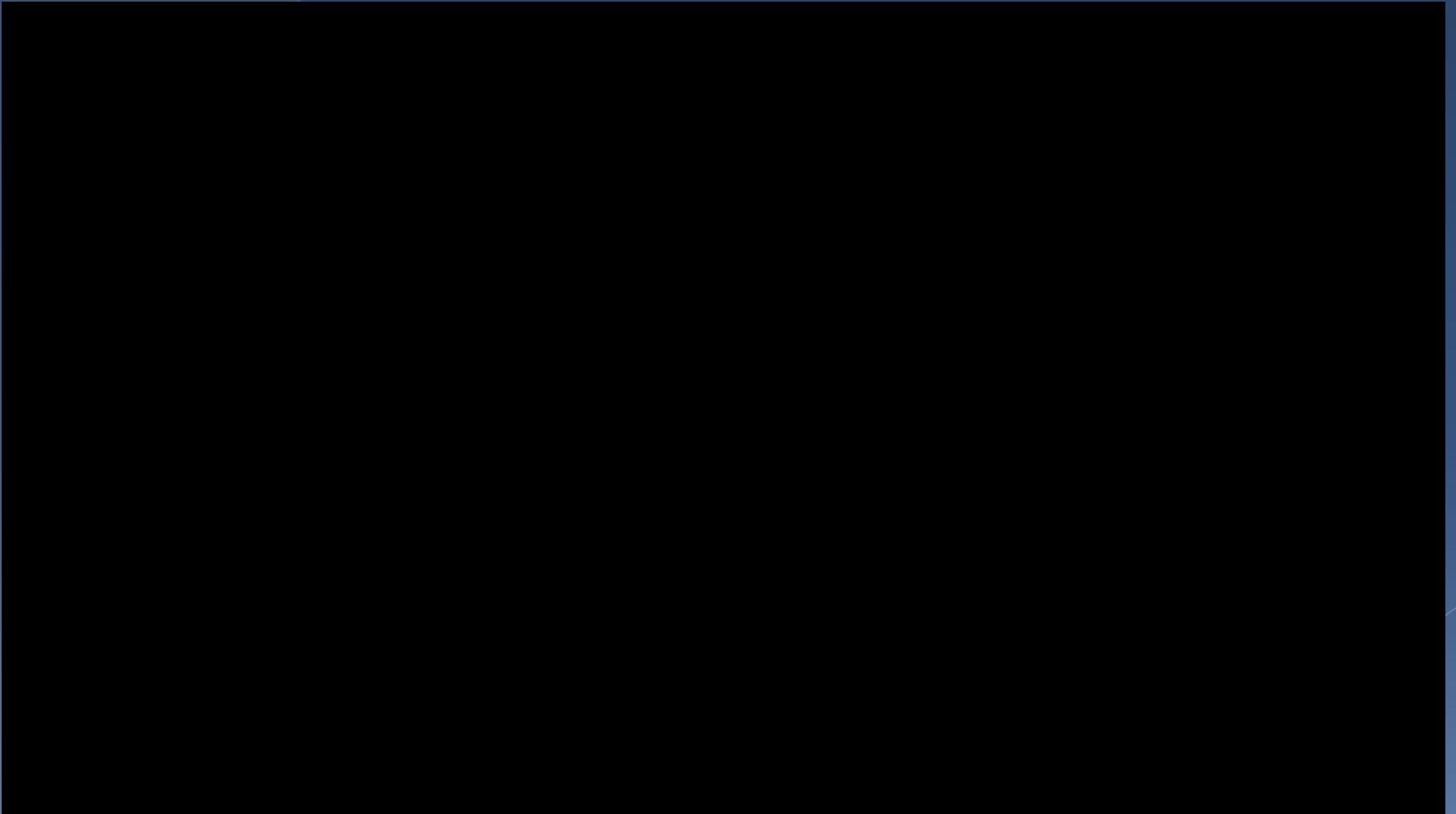
- Body Language and Tone of Voice as non-verbal communication
  - > Attentive and Interested
  - > Calm and Confident
  - > Congruent

# Establishing a Relationship

- Active Listening
  - Open-Ended Questions
  - Reflective Listening
  - Summarizing
  - Affirmations:
    - Validation (Congruent)
    - Positive Reinforcement



# Validation



- Therapeutic boundaries as the means to limit reactivity, frustration, and confusion

# Professional Boundaries

- The Consumer-Staff Relationship Exists in the Context of Employment and the Provision of Service to the Consumer/Family.
- The Purpose of the Consumer-Staff Relationship is to Benefit the Consumer/Family in terms of...
  - Increasing Independence/Self-Sufficiency, Community Integration, and General Well-Being, and...
  - Reducing Problems/Needs/Symptoms and the Need for/Involvement with Professional Service Providers.

# Professional Boundaries

- > The Consumer-Staff Relationship is a professional, helping, therapeutic relationship.
- > Anything which might interfere with, or create confusion regarding, this purpose is contra-indicated and likely unethical.
  - E.g., dual relationships
- > More specifically, this relationship cannot be a friendship (or romantic relationship).
  - It can be friendly, warm, and pleasant, but...
    - Is not for the benefit of staff;
    - Is not “give and take”, “two-way”.

# Professional Boundaries

## > Being “Equals”

- The Consumer and staff person are “equals” in terms of:
  - Their value and rights as human beings;
  - The validity of their experiences, strengths, needs, and preferences/wants; possibly, some common experiences;
  - Their collaboration and partnership in service planning;
  - Their responsibility for their own personal power and choices in creating the lives they desire.

# Professional Boundaries

- However, the Consumer and staff person are not “equals” in terms of:
  - The staff person having particular responsibilities and influence, inherent to their position/role and distinct from that of the consumer, within the context of the consumer-staff relationship.
  - As a result.....

# Professional Boundaries

- > The Consumer-Staff Relationship involves an inherent Inequity of Power.
  - This Inequity Creates Risk...
    - Primarily, for the Consumer/Family;
      - Frustration, confusion, emotional harm, and, possibly, abuse
    - Secondarily, for staff and the agency.

# Professional Boundaries

- This requires that the purpose, nature, and methods of the service and consumer/staff roles be clearly established and understood early and often in the relationship.
  - It's a "Working Relationship"
    - Don't assume that the Consumer understands the roles/functions of the relationship.
    - This often requires specific/explicit discussion.
      - The discussion may be "forgotten" – may not be "transferrable".
    - If in doubt, discuss it again.



# Professional Boundaries

- Appropriate boundaries are necessary for the consumer-staff relationship to be safe and effective.
  - It is the staff person's responsibility to establish expectations/limits and to enforce boundaries.
  - Staff persons act as employees/agents/representatives of SAM, Inc. when interacting with consumers/families – during business and non-business hours, in all settings.

# Professional Boundaries

## > Indicators of Risk/Boundary Collapse

- Relationships with Consumers can be “intimate” in terms of the content of the consumer’s self-disclosure, meeting locations in home/community, frequency of meetings, emotional intensity, etc., resulting in the need for firm, clear, appropriate, and effective boundaries.
- Weakening of boundaries is often not recognized until a specific problem/issue has manifested – e.g., “Don’t know until it’s too late”.
  - Boundary violations may not be “intentional” or planned.

# Professional Boundaries

- “Clear examples” of violations/problems are often not quickly/easily observed. Rather, there may often be an ongoing process/continuum of softening/blurring of boundaries.
  - “Questionable examples” should be discussed with your Supervisor.
- “Special Relationships” are to be considered in terms of “Special Rules” relative to:
  - What you do, say, share, etc.;
  - When you do it;
  - Where you do it;
  - How you do it.

# Professional Boundaries

## > **Methods to Minimize Risk**

- Follow SAM Policy and useful/related Professional Codes of Ethics/Conduct.
- Be vigilant – monitor yourself.
- Be open to others' feedback.
  - Other people may “see it” before you do.
- Avoid social media interaction/searches, etc.

# Top 10 Soft Skills for Customer Service

- Clear Communication
- Listening (Active Listening Skills)
- Self-Control (Cool and Calm)
- Positivity (Unconditional)
- Assertiveness (Finding the Answer and Being Direct)

# Top 10 Soft Skills for Customer Service

- Empathy
- Conflict Resolution (Understand the Problem and Solve it)
- Depersonalization (don't make it about you)
- Taking Responsibility (Owning it)
- Humor

# 8 Simple Rules

- #1. Answer Your Phone
- #2 Don't Make Promises You Can't Keep
- #3 Listen to Your Customers
- #4 Deal With Complaints
- #5 Be Helpful—Even if There is no Immediate Profit to it
- #6 Be Helpful, Courteous, and Knowledgeable
- #7 Take the Next Step
- #8 Throw in Something Extra (smile, brochure)

# 3 Things to Remember

- If nothing else, remember to
  - > LISTEN!
  - > Empathize
  - > Validate



