

CUSTOMER EXPERIENCE

12 WAYS TO PREPARE FOR YOUR CUSTOMER



THE CUSTOMER MAY NOT ALWAYS BE RIGHT, BUT THE CUSTOMER IS ALWAYS THE CUSTOMER

These guides are in place to support your learning and help you improve your knowledge and enhance your business performance

Enjoy the read and good luck, do let us know of your successes and use the other guides to expand your continuous personal development.

SUGGESTION 1 - PLAN YOUR DIARY

Ensure you know who is coming to see you each day and ensure you do not double book customers. Then plan for their arrival.

There is nothing worse for a customer, having booked an appointment to then turn up and then the staff do not know anything about it or are not prepared with the correct information. Planning your diary, will make you more efficient, but most importantly, will make you look more organised and professional in the eyes of your customer.



Start by writing out or logging your plan for each day. Including which customer and what they are coming to see you for. This will not only refresh you on who is coming in to see you but also act as a point of reference for the rest of the day. Aim to go through the process of writing or logging your plan at the same time each day. Be that the night before or first thing in the morning. This will get you into the habit of doing it but also mean that you are consistently being organised and professional.

Check you plan often throughout the day. Tick off customers who have had their work or issues resolved by you and add progress updates to anything that is outstanding or ongoing. This means then when your customers or anyone in your team ask you for an update, it should now be easy to refer to your plan and give them a real time update. Why not create your plan so it can be shared easily with your team. Build your own online form or use a shared calendar so everyone in your business can be as informed as you are!

Planning for your customer, means you are planning for success!

SUGGESTION 2 - ORGANISE YOUR PAPERWORK

Do not have paper work lying around, unorganised on your desk. Customers can see this, and this tells them you are not organised and have little care for your surroundings. Make sure you have all the paper work you need, filed but easily accessed so that when you present it to your customers, it is all correct and easy to come by. Saving you and the customer time and making you look very organised and professional. It will also reassure the customer that you care and want to look after their data.

With the new GDPR regulations coming into force since mid-2018, it is now more important than ever to ensure your paperwork is organised and secure. So ensure all customer data is kept out of site and in a secure part of your work place.

You should only have paperwork in front of you that relates to the customer you are talking to.

Make sure this paperwork is easy to come by as well. You do not want to be hunting round for it while a customer is waiting. Have a daily file system in your desk draw, alphabetised and cleared each day. This way if a customer arrives at your workstation early, you only need to know their name, so you can retrieve it from your file in your draw immediately. Make this part of your morning routine or last thing the day before.



Unable to do this due to draw space or others also needing access to the paper work? Use a secure location in your work place that will enable you to retrieve your customer's paperwork easily, but also allow other members of your business to access these documents at the same time. As a team, create a process that works for you all, is easy to follow and most importantly, is secure and does not delay the time your customer spends with you.

Remember, well organised records is not just good practice, it actually positively improves the customer experience!

SUGGESTION 3 - CHECK CUSTOMER RECORDS

Having up to date records for our customers means that we can always be certain that we can get hold of them when we need them. Always double check the details for your customers each time you see them. Circumstances change, and it is important we are aware of any changes to customer address details, phone numbers or e-mails they have made. Otherwise, we will find it hard to get in touch with them in future.



It is also important to use these records to remind us of who our customers are. What did they purchase from us last time, what other information have we logged about them? Are they married? Travel a lot? Have children etc... This allows us to truly know our customers and will delight them that we remember who they are when they visit us. All this builds trust in our customers which breeds loyalty, retention and word of mouth.

The more we know about our customers, the more we can meet and satisfy their individual needs!

SUGGESTION 4 - TAKE NOTES

When we talk with our customers, it is important that we are listening to what they say, particularly if they are calling us on the phone. Therefore, it is helpful to be able to note things down so that we do not miss any information.

Always have a pen and writing pad to hand or use a tablet or your computer to take notes and important information from your customers. No one likes having to repeat themselves, so by logging key pieces of information will enable you to remember what your customer



has told you. This will mean you complete your customer's work first time with no errors or items missed. Doing this makes you more professional and increases the likelihood that your customers will trust you and return to your business again.

Listening is not just about using your ears, so write things down to help you deliver the best possible experience for your customers!

SUGGESTION 5 - SYSTEMS LOADED AND READY

Just like having a pen and paper to hand, having all the systems you need to do your job, open and ready will not only make your lives easier, but your customer's too.

There is more frustrating for you and your customers than having to wait for systems to load. So as part of your morning routine, make sure you load up all the potential systems that you need for the day. Log in using your passwords as well so you do not spend time typing them in with your customer.

Some of your systems may time out or need you to log in again throughout the day if they are not used. But try to keep these systems refreshed as much as possible so you do not find yourself logging in each time a customer is with you. This may not always be possible, but at least if we have the screens up, it will not take as long to quickly type a password in as it would to load a whole system.

Your systems are designed with you and the customer in mind. They are designed to make things quick and easy so always make sure you have them loaded and ready to go!



SUGGESTION 6 - CLEAN AND TIDY

Nothing says prepared like a clean and well organised work space. This shows how professional and organised you are.

This builds trust and reassurance in your customer that you are the best person to look after their needs.

Some of us may be guilty of calling an untidy desk “an organised mess” and it may work for some of you. But as far as your customer is concerned, it just looks untidy and unprofessional. Nothing says I am unorganised and unprepared than an untidy desk. It is important that your desk or workstation is clear of clutter and any unnecessary items or paperwork.

Start by keeping all paperwork that is not being used, filed in your draws or in a secure nearby location in your work place. Wipe clean your desk each morning and make sure there is plenty of space available for you and your customers to interact. You will often be



running through paperwork or demonstrating items to your customers, so you will need space to do that. Also allow space for any company leaflets or brochures for your customers to read or take away with them.

Where possible, keep personal items such as bags, coats and phones out of sight. These cause a distraction and can also look untidy and unprofessional.

A clean and tidy workspace is one of the key factors in creating the right first impression with your customers!

SUGGESTION 7 - GOOD PRODUCT KNOWLEDGE

Always keep your knowledge of your company's products and services up to date.

Our businesses will regularly change or update their products and services. So it is important that you are up to date with any of these changes or updates. If we don't, then we could be giving incorrect or out of date information to our customers. If they have already done their research online, like many of us do, then they may end up looking more informed than you. Which make you look very unprofessional.

Take time each morning to review any changes to your products or services that have been made. These may be communicated to you via e-mail or on your company's intranet page. So don't ignore them as they are important and have been communicated to you for a



reason. Suggest that you discuss any of these changes in your team meetings so you as a team are all collectively keeping yourselves up to date.

Keeping up to date on our products and services, shows your customers that you are knowledgeable, experienced and trustworthy and they will want to come back to see you time and time again!

SUGGESTION 8 - CHOOSE YOUR ATTITUDE

Coming to work in the right frame of mind is key to giving your customers a truly great experience. If you are bright, happy and enthusiastic at work then so will your customers. So coming to work everyday in the right frame of mind is important.

We all have experienced circumstances outside or even inside of work that can affect our general attitude and wellbeing. If we bring this with us to work it can affect how we perform but also, it can affect those around us, especially your customers. If we have a negative attitude when we are dealing with customers, it shows, and can also rub off on them as well.



Instead, try to leave everything at home and bring your best self to work. Use positive words and phrases when talking with your customers. Smile, be polite and be positive. You will engage more with your customers and they and you will enjoy the experience.

By bringing your best self to work, you will always make the most out of all your customer interactions!

SUGGESTION 9 - DRESSED CORRECTLY

Everybody will have different types of dress codes at work. It is important you dress appropriate to your company's values or brand.



Being dressed correctly will show you are approachable, knowledgeable and that you represent your Brand. It shows to your customers that they can trust you and will get a consistent service. You also look professional and recognisable.

Whatever your company dress code, make sure you take the time to make sure you are adhering to it, but also, more importantly, that you put yourself in your customer's shoes and ask if I was a customer, would I be happy being looked after by this person.

Looking professional and approachable will be a key reason for your customers to trust you and want to come back and see you individually!

SUGGESTION 10 - POINT OF SALE MATERIAL

From time to time, our company will run offers and promotions to attract new business.

Make sure, if it is available, that you have up to date information on these offers and promotions on your workstation. Make sure they are up today date and replenished regularly.

These point of sale materials will aid you in selling these promotions and offers to your customers, as they give you a reference point to sell from and something for the customer to take away and refer to later.



However, we do not want these pieces of information cluttering up our workstation. So ensure it does not look cluttered and it is neat and tidy

Having these point of sale materials prepared and available will help you sell more but also look knowledgeable and professional in the eyes of your customers!

SUGGESTION 11 – WORK AS A TEAM

In most of our industries, we rely on other areas of our business to deliver a truly great experience for our customers. In the restaurant trade, front of house need to work closely with the kitchen in order to provide a seamless service. In the motor trade, the Service department need to work closely with the workshop and the parts department to make sure the experience runs smoothly.

So whichever teams you need to work with, make sure you are all prepared for your customer. Make sure you all follow the correct process and procedures set by your business, so that the whole experience runs smoothly for your customers. Most customers do not care how things run behind the scenes. They just want a good service. So by making sure things run smoothly as a team is the most important thing for your customers.



Communicate regularly with each other throughout the day. Have informal meetings to ensure we all know who is coming in and what for. But most importantly, ensure you are all aware that each of your team's roles has a direct impact on your customer.

Working well as a team will show your customers that you are prepared, professional and most importantly, you all strive to deliver a great experience!

SUGGESTION 12 - REWARD YOUR CUSTOMERS

It is important that from time to time, you reward your loyal customers. You want your customers to understand that you recognise their continued loyalty to your business. We can demonstrate this by rewarding them with offers and promotions specifically for them or even discounts or gifts. So that this runs smoothly it is important we know who our customers are in advance. This way we can prepare any rewards for them in advance, so we delight them and deliver a seamless service.



This will not only show that you know your customers individually but that you have spent time coming up with bespoke offers or discounts just for them. Giving them an individual service that will make them want to return time and again.

So prepare your offers and promotions in advance so you are ready to impress them and show that you value them as a loyal customer!

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