

Train Customer Service Reps for Success

Rachel Armstrong



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The customer service world has progressed significantly in recent years. From the phone to email and now online chat and social media, customers have many ways to get the assistance they need. Just as the means to facilitate a customer service interaction have progressed, so too have customer standards.

According to HubSpot's *The State of Customer Service in 2020* report, 93 percent of service teams agree that customer expectations are higher than they were the prior year. Similarly, the majority agree that customers are smarter and more informed as well as are more likely to share their experiences—both positive and negative—than they were in the past. Those data points indicate that the customer service experience is a significant consideration in a customer's choice in doing business with a company.

As an e-commerce shopper, individuals can easily browse online for whatever they need. If they have a

question they cannot solve independently or a concern they need addressed, they are able to contact a customer service representative from wherever they are. For many customers, that may be the only interaction they have with a company, and if it is a negative experience, they may choose not to return for business. On the other hand, if the experience is great, that interaction may well create a loyal customer.

Companies need to be prepared to meet customers' ever-growing expectations to remain competitive. The question then is how do talent development professionals ensure that customer service teams provide customers with experiences that meet high standards?

In this issue of *TD at Work*, I detail:

- The skills customer service teams need to meet customers' expectations
- Techniques for training new hires for those skills
- Methods to effectively support customer service representatives after the training program
- Ways to prepare reps for the future

A Positive Experience

It may seem like an impossible feat to meet customers' increasing expectations. The reality, though, is that their expectations are relatively simple. All they want is someone friendly and knowledgeable who listens to them. According to HubSpot's data, there's a direct correlation between company growth and the efforts organizations make to listen to their customers.

When you take a step back, that makes perfect sense. Everyone wants a customer service rep who is friendly and knowledgeable, who listens, and who can help. If that person is rude or seems disinterested, would the customer really want to deal with that company again? Conversely, while it is always pleasant to get a friendly rep, if the rep doesn't listen or doesn't know how to assist, their friendliness is for naught.

Customer service is all about a person-to-person interaction, where reps communicate directly with the customers. Thus, it is vital to have the right people in those positions. You want individuals who will happily provide a customer service experience that not only meets but exceeds expectations.

The first step is to hire the right people. Reps need a desire to help others as well as the basic communication and technical skills to complete the job.

Once you have hired the right reps, train and develop them to perform to the standards and expectations you want every customer service experience to be. You must design a comprehensive training program that prepares reps to be friendly and knowledgeable. The training program will set the tone for how reps should interact with customers and enables your learners to practice and refine their skills so that they are ready to successfully and confidently interact with real customers.

Needs Assessment

To design a training program that adequately prepares customer service reps, you first want to better understand what positive customer service looks like in your organization. You will need to complete a thorough training needs assessment to determine what a positive customer service experience means.

Review Survey Results

Start by examining your company's customer satisfaction survey results. To see what meets or exceeds customer expectations, look at the high-scoring results, and read the comments to see what respondents wrote. What impressed them during the interaction with the rep? What did they say the rep did that they really appreciated?

Then, review the middle-scoring results. Read those comments and compare them to the comments associated with the high-scoring results. What are the differences that made the middle-scoring interactions less than wonderful experiences?

And finally, look at the low scores. Read those associated comments carefully. What did customers say they disliked about those interactions? What did the rep do—or not do—that made the experience poor? That information will let you know firsthand what customers think and want.

Observe

Next, observe a few high-performing reps—those who have earned high remarks and positive comments from

customers. Do this live while reps interact with customers or by listening to recorded calls or reviewing emails or chat conversations. When conducting your observations, look for what the rep does well to positively end each interaction. Also look for patterns of what made the exchange go well.

When possible, observe the reps during their interactions so that you can ask questions to better understand why they do the things they do. Learn as much as you can from the best reps so that you can train new hires to replicate their actions.

If your organization does not have many top performers, observe reps who perform well and notice what they do better than others and what they need to do differently to improve.

Everyone wants a customer service representative who is knowledgeable, listens, and can help.

Interview

Conduct individual interviews with various people and ask as many questions as needed to gain an in-depth understanding of how to get customer service reps to perform at their best. Here are some people to interview:

- **Top performers.** You especially want to interview these individuals if you are unable to observe them live.
- **Average performers.** Get their feedback on what worked when they were initially trained and what they wish was better about their training.
- **Customer service rep managers.** Find out what they look for in a top performer and what individuals who are not top performers need to improve upon.
- **Team leads.** These are usually the go-to people when reps have questions. Determine their most frequently asked questions and their recommendations for the training program.

- **Quality assurance team.** Gather their feedback on what they think are elements of a great customer interaction versus a poor one.

By taking the time to complete a thorough needs assessment, you will gain better insight into what a positive customer service experience looks like in your organization. The next crucial part of your training needs assessment is identifying the exact skills reps need to become top performers.

Necessary Skills

The purpose of the training you're designing is to equip customer service reps with the skills they need to meet or exceed customers' expectations. To do so, identify the specific skills and capabilities that make a rep friendly and knowledgeable. Note: Your training and development program needs to focus on both hard and soft skills. (See the resource at the end of this issue for blended learning ideas for both skill sets.)

Hard Skills

Hard skills, or knowledge, are the technical factors that a rep needs to know and do to efficiently help customers. Being knowledgeable entails being able to readily and clearly provide answers to customers' questions, for example about product features, the return policy, and interoperability with other products. Consider the following capabilities as they relate to hard skills as well as the recommended questions to ask during your needs assessment.

Knowledge of products and services. When customers call, they want to receive more information than what they have found on your website. Reps must have in-depth knowledge of all the products and services your company offers.

Questions to ask:

- What does the company offer?
- Where do reps go to get more information on a product or service?
- Is there a knowledge base where this information is stored?
- How often is the knowledge base updated?

Knowledge of phone and computer systems. These systems—the foundational tools for communication—