

Team Operating System

Customer-Focused Training

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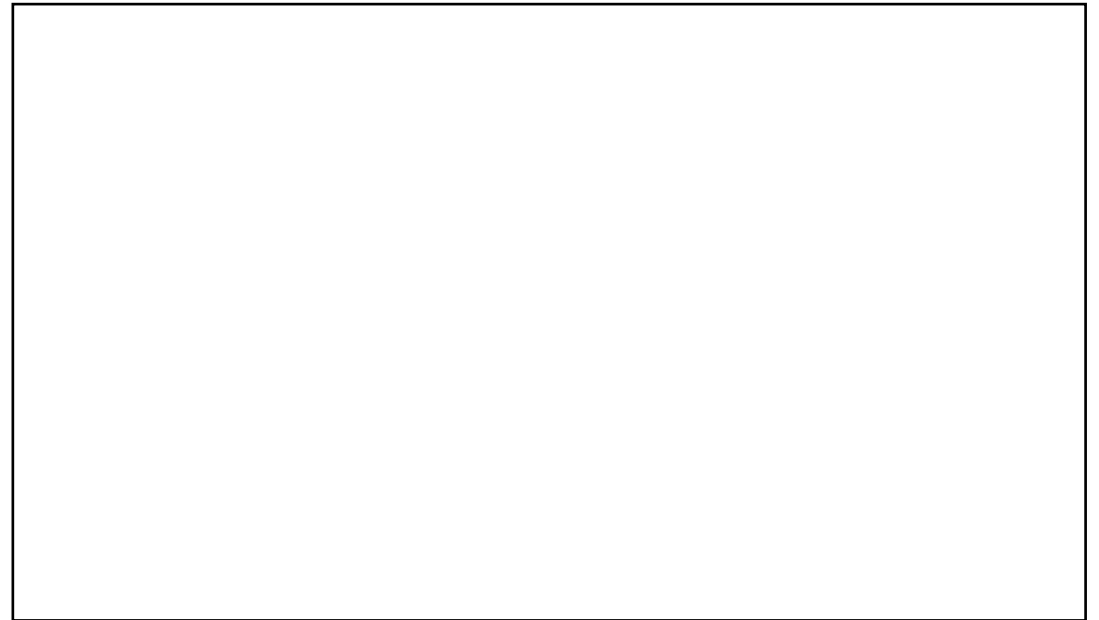
4 Training Tips for Success

- **Ensure that your training manager is experienced in leading training programs. If there are new to the role, have them contact Michel for best practices to familiarize themselves with the content Michel has provided.**
- **Refresh the training materials very 3 – 6 months.**
- **Identify 3 companies your organization admires for their customer experience efforts, study their practices and understand how you can implement some of these best practices.**
- **The training manager shouldn't be doing all of the training. Identify some subject matter experts within your business to lead portions of the training. Peer-to-peer learning is a great way to transfer knowledge.**

What is Customer Service?

Customer service are actions.

When you pay for items at a grocery store, the employee helping you is delivering an action within the customer experience.



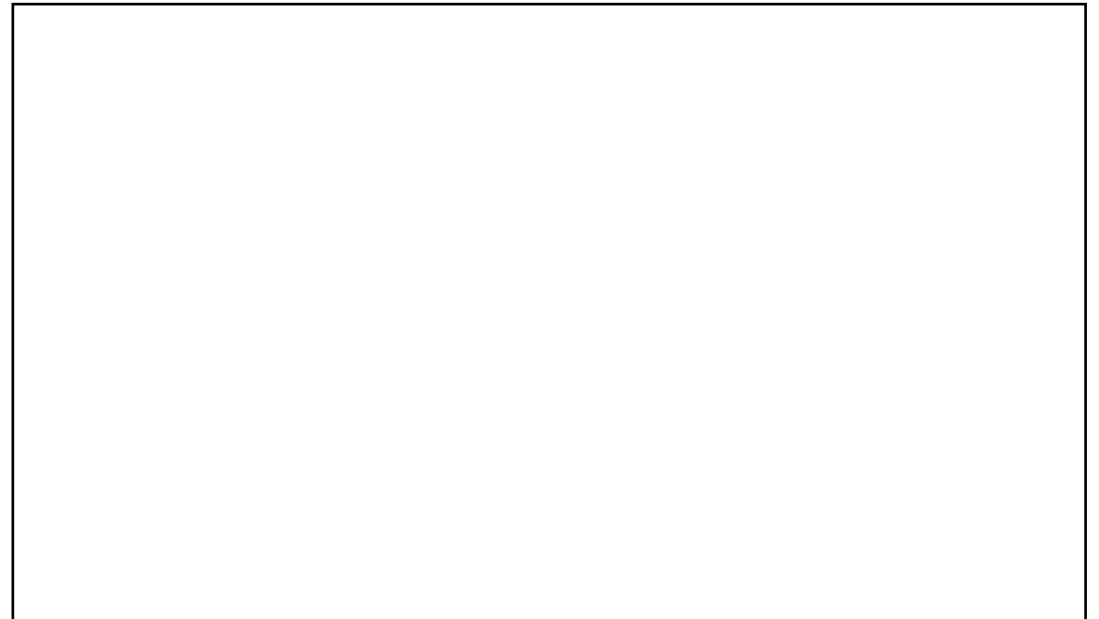
What is Customer Experience?

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This slide is a note for the reader.
You may remove it when it comes
time to use this slide deck to train
your team.

Customer experience is a collection of interactions that your customer comes across when doing business with you from beginning to end.

Think about your time at a movie theatre. Every interaction, from buying tickets and popcorn to visiting the bathroom and having your tickets validated, make up the entire customer experience.



Micro Interactions

- A micro interaction within the customer experience are the touch points that we often neglect.
- Within a movie theatre, these touch points could include the cleanliness of the parking lot and whether the ketchup dispenser at the concession stand was adequately stocked or not.
- Micro interactions are a great opportunity to deliver an unexpected experience since your customers and competitors aren't often focused on these touch points.

Macro Interactions

- A macro interaction within the customer experience are the touch points that are customers expect us to be great at.
- Within a movie theatre, these touch points could include the comfort of the theatre and the ease of purchasing tickets.
- Macro interactions are table stakes. We must excel in these areas to remain relevant within our industries.

Break-out session

Identify the different macro and micro touch points that your customer experiences when doing business with you.

Once complete, identify which department manages each interaction.

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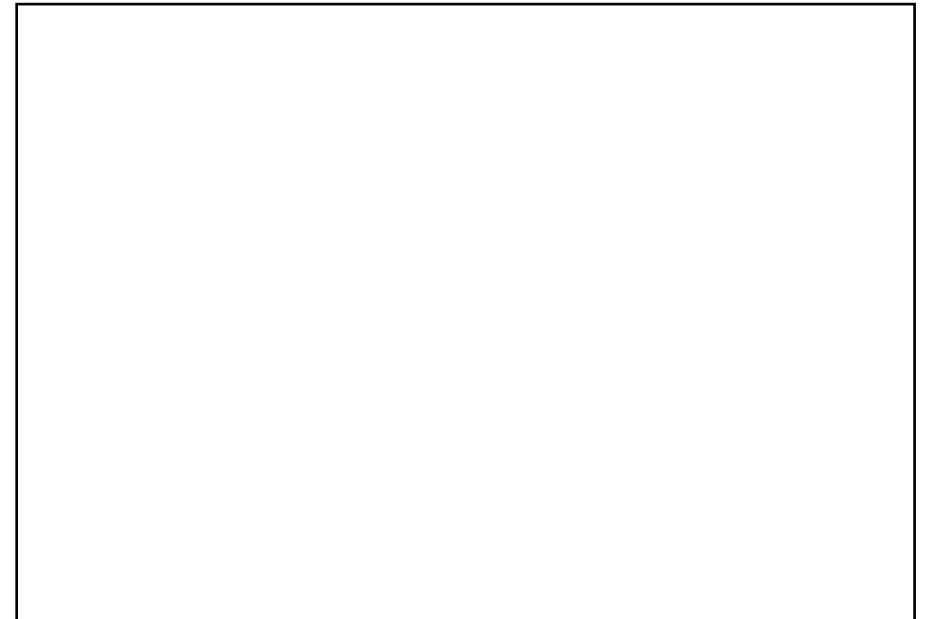
This will give your team members the opportunity to start thinking about the entire customer experience. The purpose of having them identify which departments manages each interaction is to profile that your entire team must work together to create a next-level customer experience. It's not the responsibility of your customer service or customer support team.

What is Organic Growth?

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On this slide, ensure that you mention that customer experience fuels organic growth because it's not likely that customers will tolerate a great product supported by a poor customer experience.

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- Organic growth is defined by the revenue that your company earns through repeat purchases from existing customers and acquiring new customers because of word of mouth marketing.
 - Organic growth is fueled by customer experience.



3 Customer Personality Types

Customer-Focused Training

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Customer Personality Types

- Not all customers are alike.
- Some customers value certain things more than others.
- It's imperative that employees identify the customer personality type early on within the experience to deliver a personalized experience.

Socializer Personality Type

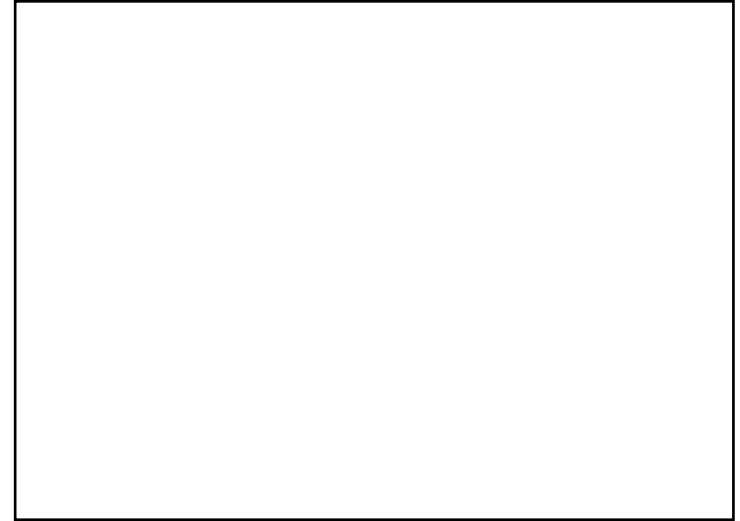
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After presenting this personality type, ask your team who prefers to do business with this customer personality type and why.

This personality type is the customer who is enthusiastic, speaks at length and often has off-topic conversations. They can be some of your best customers because they will let you lead the relationship and are open to recommendations.

Values: sincerity, relationships that aren't transactional, warmth and kindness.

Threats: the biggest threat in managing a relationship with this customer is keeping them focused on the task at hand.



SOCIALIZER

Director Personality Type

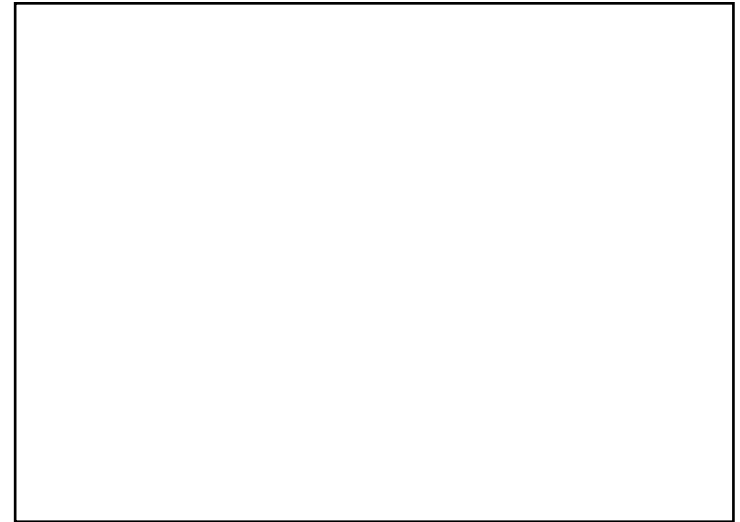
This personality type is the opposite of the socializer. They mean business and everyday conversations such as “Are you enjoying the great weather we’re having?” isn’t going to build rapport.

Values: efficiency, a transactional relationship, their time.

Threats: you must know your product knowledge very well as this customer may believe they know more than you.

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After presenting this personality type, ask your team who prefers to do business with this customer personality type and why.



DIRECTOR

Passive Personality Type

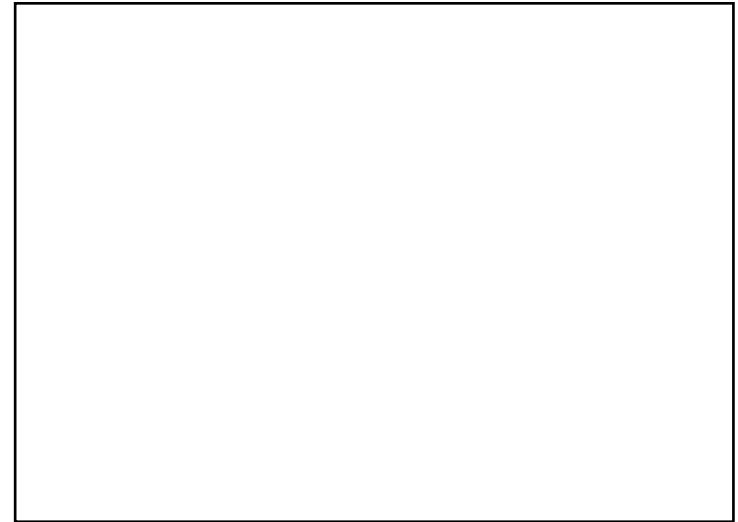
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After presenting this personality type, ask your team who prefers to do business with this customer personality type and why.

This customer is often misunderstood. Your employees may say things such as, “They are boring and lack enthusiasm.” This might be the case because your company or industry may have wronged them before.

Values: a relaxed approach to customer experience, not being pushed to buy a product or service, a trustworthy company and brand.

Threats: don’t give up on this customer, they can be some of your most loyal customers.



PASSIVE

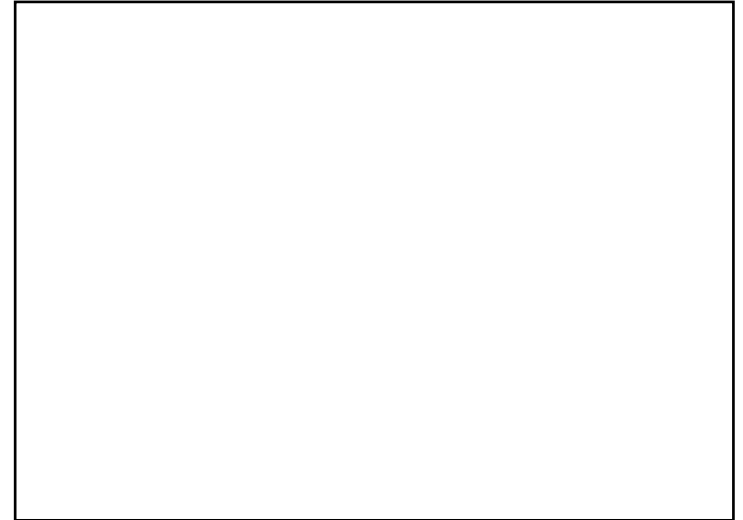
Defensive vs. Offensive Customer Service

*Transitioning between the two to deliver a
next-level customer experience.*

The logo for 'tnos' is displayed in a large, bold, sans-serif font. The letters 't', 'n', 'o', and 's' are white, while the letter 'o' is a vibrant orange. The 't' and 'n' are connected, as are the 'o' and 's'.

Defensive Customer Service

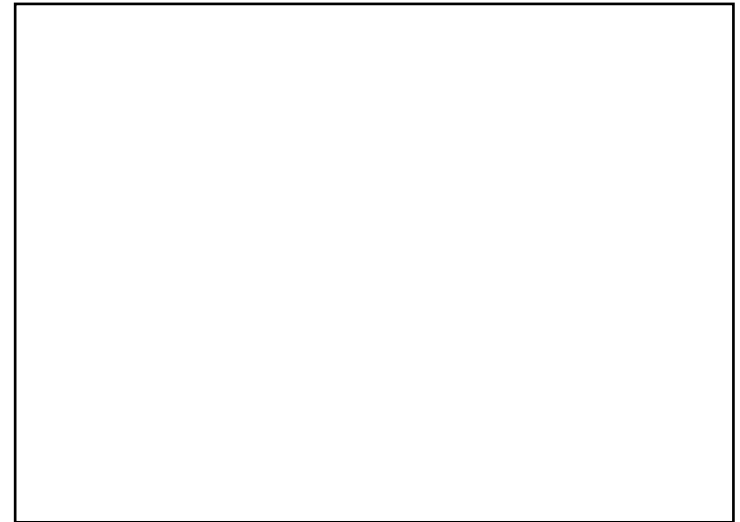
- After greeting a customer, whether it's online or offline, ensure that you remember to play defense.
- Immediately pin point the customer personality type to personalize the experience for them.
- Exhibit active listening to understand the customers needs and wants.



Offensive Customer Service

- After the customer has shared their needs and wants with you, switch gears and play offense.
- Reflect on what the customer's desires are and take action.
- Ensure that you continuously pay attention to their customer personality type.

Note: you may need to switch back into defensive customer service if the customer has other questions.



Break-out session

Identify the different macro and micro touch points that your customer experiences when doing business with you.

Once complete, identify which department manages each interaction.

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Do this in groups of two and ensure each team member has had the opportunity to exhibit each personality type.