Customer Service Officer Training Manual And Handbook

MICROTECH

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Introduction

GGreetings!
This is your first day in the Customer Service Officer position.
This Handbook will provide you with all the basic information about our company and your job. Also, we will try to answer any possible questions and give you some essential tips.
Let us go!

- Jeffrey Baker, CEO of microtech

First, here is the brief information about our company. microtech specializes in a wide range of services, including tailored IT services and solutions for small and medium businesses. We are focused on providing every one of our clients with high-quality service and support. Our unique IT team is incredibly friendly and can help every step of the way in growing business. Our employees develop and enrich customer service experience and drive profitable sales, brand growth, and loyalty for many business areas. Each of our team is very important for the company and presents our main principles: honesty, professionalism, and respect. At microtech, we work to create a culture centered on customer service that includes not only our external customers but our staff as well!You are in a noble profession! Be proud of what you do and where you work and exceed any expectations!

- Who are our customers?

A Customer is:

- The most important person we do business with;
- A person who expects satisfaction and value for money spent;
- A person who should be treated with respect and cared for to the best of your ability, no matter who they are;
- A source of information to help improve our business and your skills;
- Not an interruption of our work but the purpose for it.

Customers want to pay a fair price for quality service and feel satisfied they have paid for a service and received what they have paid for in return. They need someone to understand their needs and help answer them. Customer service starts with the ability to listen to the customer and find out through polite questioning what he/she needs or wants.
The most important aspect to do is to listen to what the customer is saying. If people do not understand what is motivating the customer, they will not be successful in handling them. Research customers, their habits, and what they want and expect. Keep these simple theses in your mind while working, be communicative, and respectful, and you will succeed!

Primary Customer Service Officer Duties

1) Information and support of the team.

Our Customer Service Officers are the main source of essential information for the company analysts and Head Office managers. Investigation and intelligence service will be your first tasks: it will help you to understand our area and learn to systematize the information.

Hint: buy a notepad or make notes on the smartphone. It will help you to be always ready for essential communications and quickly find critical information.

2) Processing mail, business correspondence.

A lot of our clients prefer to communicate via email, so the Service Customer Officer must be ready to answer all messages. Don’t forget about the Email etiquette!

Hint: this article can give you basic rules of email communication. Use the Internet – try to find your dialogue style. Be respectful and confident; people like these traits!

3) Reacting immediately to all notifications (emails, phone calls).

Answering your business email promptly should be a priority for all businesses. Not only is email a vital communication line with your customers, but it is also often used by them to gauge that you are trustworthy. If a customer sends you an email with a simple question, and you take forever to answer it, what does that say about the rest of your operation? We all want to play with the big guys, don't we?

4) Document photographing and sending. Composing and typing routine correspondence and reports, recommending potential products or services to management by collecting customer information, and analyzing customer needs. Contributing to team effort by accomplishing related results as needed.

As we have mentioned above, investigation and intelligence service are the main source of essential information for the company. Customer Service Officers collect valuable reports and client documentation and send it to the Head Office managers and Office Coordinators. If you have solved any complex issue – share this information with the team, because the collective experience is the best way to gain essential info.

Hint: the messenger or the email will be the best way to contact your coordinator. All documentation and reports will be saved in message history in one place, and it will save you a lot of time.

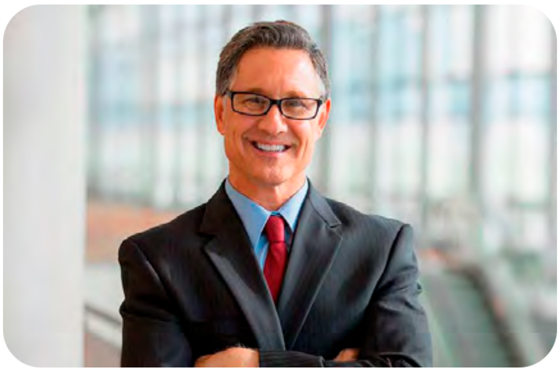
5) Providing necessary information to clients and callers. Answering telephone calls from the customer service manager and customer service support team.

How a company answers the phone can tell the whole story of how they treat customers and employees. The correct phrase said in the right order in a positive tone leaves a good impression and starts the customer-client relationship off on the right foot.

- Telephones should be answered as promptly as possible. Try to set a specific number of rings, and make it your goal to respond before the 4th ring, for example. More than four rings signal the inattentiveness of your company.
- Greet the caller, e.g., “hello,” “good morning.” Good manners show you respect the caller. The greeting is key; it sets the tone and style of the whole interaction.
- Give your name, e.g., “Hi, my name is Emma.” This is a courtesy that serves to personalize the customer service experience as well as allowing the customer to hold you accountable for your level of service.
- Ask the customer if or how you can help. Asking to help tells the customer you are there to serve his/her needs and to solve his/her problems. This also leaves the customer with a positive impression. Get maximum information about the task; it will help you to avoid any possible misunderstandings.

My boss said to me one time: You must always smile. When I smile even during a phone call, the client feels a positive attitude. This simple hint seriously helped me with hard clients.

- Michael Ellington, Dallas Virtual Office Manager



6) Handling complaints, providing appropriate solutions and alternatives within the time limits, and follow up to ensure resolution. Working with the customer service manager to ensure proper customer service is being delivered.

Resolve the customer’s issue. A common way to resolve product or service problems contains several steps:

- Clarify the customer's complaint;
- Determine the cause of the problem;
- Select and explain the best solution to solve the problem;
- Expedite correction or adjustment;
- Follow up to ensure resolution.
- If you are not competent in some questions, do not inform the client about it – just tell him/her that his issue will be sent to the analytical department and contact your coordinator. We will give you some troubleshooting hints in this section of the Handbook.

- After you get the needed information from the coordinator, contact the client and help him with his issue.
- Save all critical information from clients and the customer support team. It will help you and your colleagues to gain the necessary experience for further work

7) Opening bank or e-currency accounts for company needs (for salary, as well as receiving analysis of the work of banking services of certain banks, to inform customers about reliable and fast payment methods).

In our work, it is important to be able to work with money transfers. Our clients will ask about ways how they can send money abroad or within the country. You will receive 2% of each successful assistance as a bonus reward. More info about salary, rewards, and requirements you will find in the Benefits section of this Handbook.

8) Compile reports on overall customer satisfaction. Create and maintain reports about customer interactions.

Reports are an essential part of work. Our Analytical Department will include this information into an individual statistic that shows your proficiency and professionalism. Each successful interaction with the client makes you closer to the Head Office Manager position!

Hint: our managers pay special attention to the ways of the problem solution.

Training Program

Each new employee of the microtech passes through a short Training Program. This program is free and will give you some required skills and knowledge for further work. Please pay attention: microtech will not pay you for this period. Our Customer Service Officer training program is quite simple and consists of several steps:

- **Day 1.** Environment setting and familiarizing yourself with your curator. It is the simplest day: you begin to speak with your curator via e-mail and receive basic info.
- **Day 2.** Investigation and intelligence practice. Your curator will give you several tasks focused on finding the best solution for some business issues. During this day, you will research competitors' solutions and try to find a better solution.
- **Day 3.** Practical tasks. These tasks will include work with exchanges: finding the best rate, researching requirements, and offering the best solution to the curator.
- **Day 4.** Your first email client! Today you will talk with your client via email. It is required to test your communication skills and troubleshooting ability.
- **Day 5.** Phone call training. Similar to Day 4, you will work with a client, but via phone. Be attentive! Remember: this is your most important task!

After the last day, depending on your results, we will negotiate about your preferences and work position.

Hint: the first day has begun already! Install messenger (or use email), examine the Handbook, and send all your questions to the curator!

Troubleshooting

Some things which may upset a customer are simply unavoidable. Here are some tips on how to best handle these situations.

“Being polite”

It’s an important part of the conversation. Sometimes things can be hectic. When there are problems behind the scenes, keep them quiet, and don’t let your customers see your frustration. Welcome your clients. Use their name. Acknowledge their emotions and empathize. Reassure clients you can help. Thank them, and leave them with a positive comment.

“No”

No one likes the word “no.” It is de-motivating, discouraging, and disinteresting. You will hear this word throughout your life as a customer and as a service provider. “No” is equivalent to “bad service.” “No” is easy, cheap, unproductive, and harmful – it means failure. Unfortunately, “no” is the word we most often hear when a new idea, new request, or new concept is introduced. Admittedly, there are times when you will have to say “no,” but focus on what you can do for the customer; accentuate the positive and not the negatives of the situation. It is better to say, “What I can do is…” and demonstrate that you care and want to provide quality service despite your current limitations.

“Putting a Customer on Hold”

Ask the customer if you can put them on hold; wait for them to say “yes” or “no” and then explain it will only be for a short period. Explain to customers why you are putting them on hold (for example, you need to contact the Analytical Department or Head Office manager.) Thank customers for holding.

“Taking an Assistance”

If you need assistance from your coordinator, explain this situation in a positive light but do not be too specific. Explain that it can take some time and ensure the client that his issue will be solved asap. Apologize for the possible delay.

“Ending the Call”

This is the final step in good telephone etiquette. A good customer service representative ends the call on a positive note, repeating any actions agreed to be taken and what is going to be done to help or serve the customer.

Your Benefits And Career Prospects

Your salary will be $3,500.00, one month after the completion of the five-day training, plus 2% for each successful transaction conducted with a client (timely informing about the promotions, receiving and sending client requests to the chief manager, which subsequently led to the successful conclusion of an agreement with microtech.

Your benefits are numerous:

• Work from the comfort of your home office.
• Enjoy a people-centric environment: our work is focused on the clients. A lot of new people, a lot of unique experience, gaining new skills and professional development!
• Providing specialized courses and seminars for our workers: we are always ready to help our employees. If you want to grow in the customer service sphere, we will offer you many opportunities to do this.
• Our employees have excellent career prospects. Beginning as a Customer Service Officer, you can become the Head Office Manager in less than a half of a year. It all depends on your desires and willingness to grow!
• Full insurance. microtech pays for full medical and dental insurance of our employees: these payments won't be deducted from the paycheck. We value our team!

Without any doubt, this is the best work in my life.
I began as a CSO in Massachusetts, and now I have the position of Chief Analyst in the New York branch.
Hard work and responsibility will raise your life to the highest level!
- Simon McCallan, Chief Analyst, NY branch

Communication Tips

1) Making a good first impression

The reality is we prefer doing business with people we like and trust. The impressions that we make are key to developing trust and confidence with the customer. As the old saying goes, “You will never get a second chance to make a first impression.” Therefore, the first impression is extremely important and can set the tone for all future interactions.
Many times, you may be meeting a customer for the first time as you are assessing a report of abuse or neglect. Choosing a positive attitude and making a good first impression may enhance your working relationship with the customer should services be required.

Such factors create a negative impression:

- Making the client wait;
- Not answering the phone promptly;
- Not saying “please” and/or “thank you”;
- Speaking loudly or condescendingly to clients or colleagues;
- Focusing on another task while addressing or servicing a client.

Remember, impressions stay with those you meet, especially clients, and once registered, negative impressions are challenging to overcome.

2) Communicating with the unsatisfied client

How many times have you, as a client, run into the problem of excuses? You have a question, and the sales manager, technician, or customer service representative is making lame excuses. Namely:

- The computer system was down half the day.
- It is the manager’s fault.
- I never got the message.
- That is out of my control.
- I just do as I am told.
- That is just the way it is.

Sometimes it feels as if nothing is anybody’s fault or is in anybody’s department. This is poor customer service. Excellent customer service means accountability, responsibility, and acting to satisfy the client.
Here are some tips for dealing with the unsatisfied client:

- Listen: it is essential to listen attentively to complaints, frustration, or grievance of the unsatisfied client. Be patient, attentive, and friendly.
- Express your apologies:

  - “We are sorry for this mistake/problem.”
  - “We are sorry for this inconvenience.”
  - “How can we work together to solve this problem?”
  - “I can imagine how frustrated you must feel.”

- Do not argue and do not interrupt: this will only worsen the situation, especially if the client is angry. Let the client speak before you try to discuss the issue.
- Do not lose your self-control: if you remain calm, clients will calm down.
- Point out the facts: listen carefully – and write everything down. Do not make any comments until the client is finished talking.
- Admit the problem: if you can suggest a solution, do it. If not, tell the client what actions you will take and what actions you will follow. Never make the mistake of promising something you are not able to accomplish.
- Involve the client in problem-solving: suggest to the client alternative solutions, if they exist. Clients appreciate the opportunity to choose the ways (methods) of problem-solving.

Conclusion

So, as you can see, providing quality customer service isn't just about smiling and being polite. The more respected and valued our clients feel, the more likely they are to partner with us to achieve positive outcomes. This is the reason we are all here.
We hope this information will help you with the Customer Service Officer position.

- Jeffrey Baker, CEO of microtech

Application 1. Email etiquette

When the use of email became common in the early 90s, the business world changed. Email now takes up a significant portion of our workday. According to a study by the International Data Corporation (IDC), workers spend 28 percent of their workweek reading and answering emails.
While we try to work faster and more efficiently, we must not forget the social rules that accompany any form of communication. Here are some of the dos and don'ts of email etiquette.

1) Do have a clear subject line.

Most of us have to compete with the hundreds of emails clogging our inbox every day, so the clearer your subject line, the more likely your message will be read. For example, if you're sending a proposal to someone, be specific and write, "The Fitch Proposal Is Attached."

2) Don't forget your signature.

Every email should include a signature that tells the recipient who you are and how to contact you. Set it up to automatically appear at the end of each email. Include all of your contact details, so the recipient doesn't have to look up your address, email, or phone number.

3) Do use a professional salutation.

Using "Hey," "Yo," or "Hiya" isn't professional, no matter how well you know the recipient. Use "Hi" or "Hello" instead. To be more formal, use "Dear (insert name)." Using the person's name in the salutation - "Hello Robert" - is quite appropriate, but remember not to shorten a person's name unless you're permitted to do so.

4) Don't use humor.

Humor does not translate well via email. What you think is funny has a good chance of being misinterpreted by the other party, or taken as sarcasm, without the accompanying vocal tone and facial expressions. When in doubt, leave humor out of business communications.

5) Do proofread your message.

Don't be surprised if you're judged by the way you compose an email. For example, if your email is littered with misspelled words and grammatical errors, you may be perceived as sloppy, careless, or even uneducated. Check your spelling, grammar, and message before hitting “send.”

6) Don't assume the recipient knows what you are talking about.

Create your message as a stand-alone note, even if it is in response to a chain of emails. This means no “one-liners.” Include the subject and any references to previous emails, research, or conversations. It can be frustrating and time-consuming to look back at the chain to brush up on the context. Your recipient may have hundreds of emails coming in each day, and likely won’t remember the chain of events leading up to your email.

7) Do reply to all emails.

Give a timely and polite reply to each legitimate email addressed to you. Even if you do not have an answer at the moment, take a second to write a response letting the sender know you received their email. Inform the sender if their email was sent to the wrong recipient, too.

8) Don't shoot from the lip.

Never send an angry email, or give a quick, flip response. Give your message some thoughtful consideration before sending it. If you feel angry, put your message into the “drafts” folder, and review it again later when you are calmer and have time to formulate an appropriate response.

9) Do keep private material confidential.

It is far too easy to share emails, even inadvertently. If you have to share highly personal or confidential information, do so in person or over the phone. Ask permission before posting sensitive material either in the body of the email or in an attachment.

10) Don't! overuse exclamation points.

Exclamation points and other indications of excitement such as emoticons, abbreviations like LOL, and all CAPITALS do not translate well in business communications. Leave them off unless you know the recipient extremely well. It’s also not professional to use a string of exclamation points!!!!!
It may take some practice to keep your emails professional and to the point, but you will look more polished and organized in the long run.

Frequently Asked Questions.

Q. How will I receive e-mail messages and phone calls from clients?
A. You will use your personal e-mail box and phone number during your training period. Right after the training, our Technical Department will create for you a corporate e-mail address and a dedicated telephone line.

Q. Are our clients located in the United States of America only?
A. Yes, they are. We only work with clients from USA.

Q. What time zone will I use working for your company?
A. You will use your local time zone.

Q. Will I be in contact with my co-workers from other departments to send the information about clients questions as quickly as possible?
A. You'll get a supervisor during the training. All the client's requests should be rerouted to your supervisor. As soon as the training is completed you will have an opportunity to get an access to other microtech departments.

Q. I still have got some questions. What person can I direct my questions to?
A. During the training Matthew Anderson, Customer Service Manager of microtech will be your supervisor. You're welcome to direct all of your questions to him via e-mail or in Work Panel chat.