
Managing Customer Expectations

Participant Manual



*The Quality Management System of
Dale Carnegie Global Services is
ISO 9001 certified.*

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IMEC: Managing Customer Expectations PM V1.0, July 2021

OBJECTIVES



1. Review what our customers expect from us and why it's hard to hit that right now
2. Learn a process for dealing with customer complaints and manage their expectations
3. Look at time-tested ways to deal with stress, worry, & anxiety

When we are the customer, what do we expect of the companies we do business with? How do we want to be treated?

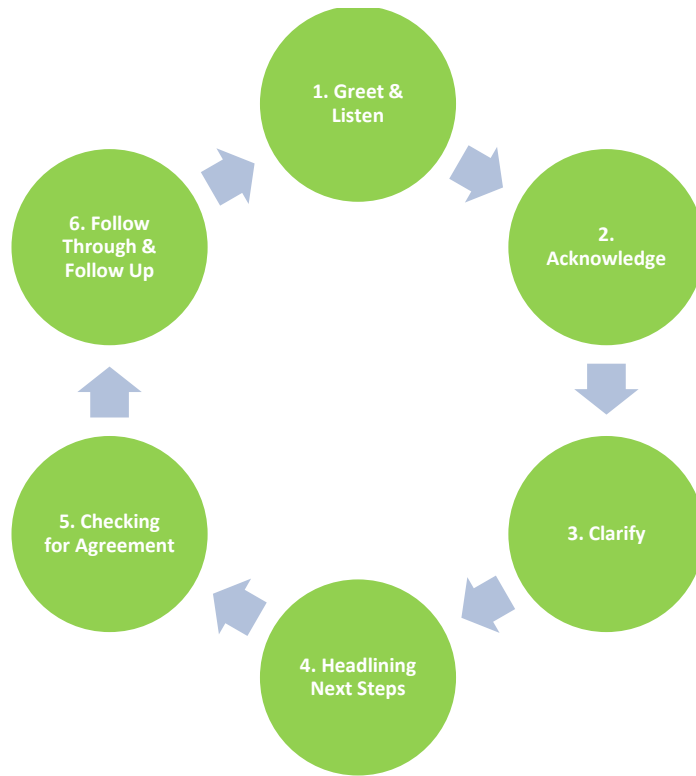
What is challenging about living up to those expectations post COVID?

Techniques for Managing Customer Expectations

Set Expectations	<ul style="list-style-type: none">• Upset customers• Less-than-ideal customer experience
Monitor Expectations	<ul style="list-style-type: none">• Follow up needed• Issue not handled first time around
Influence Expectations	<ul style="list-style-type: none">• Customer has unclear or unrealistic ideas about an organization's capability



SETTING EXPECTATIONS



1. Greeting & Listen

Listening Levels:



2. Acknowledge

Disagreements escalate when one party or the other does not feel heard or respected.

What is a verbal cushion? What does it do? What does it not do?



3. Clarify

There are 3 major question types that can help us get a full picture of the situation:

Factual Questions – these are the basic facts: who, what, when, & where

My examples of Factual Questions:

Elaborative Questions – these get the other person talking more (elaborating). These might be as simple as, “Tell me more about that” or “Help me understand how that affects...”

My examples of Elaborative Questions:

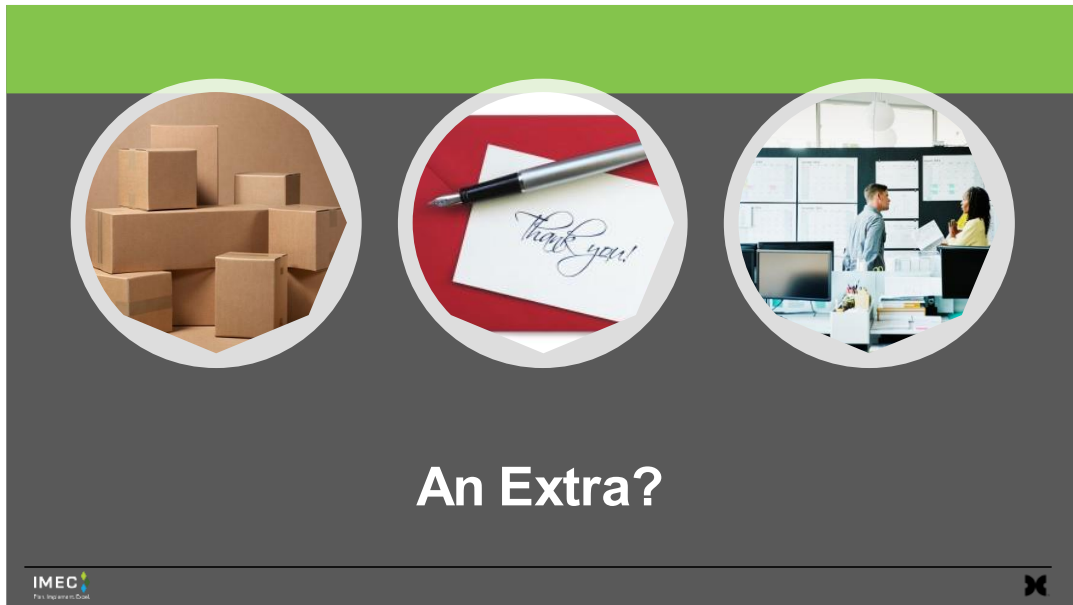
Evaluative Questions – the answers to these questions help us figure out (evaluate) what actions we need to take to resolve the situation. An example is, “How would you like to see this resolved?”

My examples of Evaluative Questions:

4. Headlining Next Steps

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What is “headlining?”



What is an extra that I or my company could provide to [upset or disappointed] customers to help them feel important?



5. Checking for Agreement

Why use “open-ended” questions here? What are some examples?

If we have to cite company policy, what should we do to help the customer understand better?



6. Follow Through & Follow Up

How do I follow through with what I am promising the customer?

How do I / my company follow up with the customer after the issue has been addressed?

Who are some companies that do a great job of responding to comments on social media? Does my company monitor what is said about us on social media? In what ways can we better respond to comments (both positive and negative) on social media?

Monitoring Expectations

Used when follow through is needed:

- Requests for additional information
- Questions and special requests
- Complaints



Best Practices for Monitoring Expectations:

- Acknowledge any information that the customer provides
- Indicate where your organization is in resolving the situation and the next steps in the process. **OVER COMMUNICATE!**
- Use headlining to sum up action wherever possible. For example, “Your issue will be turned over to our service technician. She will call you by the end of the day.”
- Respond to requests for additional information by providing a specific time the customer can expect follow through. Be sure to do so within that time frame.

Notes

Influencing Expectations

When customers don't have a clear idea of what your organization does or what it takes to fulfill their request...

- Be someone the customer trusts
- Educate your customers
- Allow the customer to “save face”
- Make hero statements



A “Hero Statement” is a reassurance to the customer that they will be taken care of. It is designed to ask them to extend trust to you and restore their confidence in the company.

Examples include:

- *“Don’t worry. We’re taking care of everything.”*
- *“When it comes to quality, we’re the best in the industry!”*
- *“I’ll see to it myself that this gets take care of.”*

Hero Statements I would use with a customer:

MANAGING EMOTIONS to deal with Stress, Worry, & Anxiety

Do Well	OFI	Principle
		1. Live in “day-tight” compartments.
		2. Get all the facts. Then weigh the facts and come to a decision. Once a decision is reached, act!
		3. Cooperate with the inevitable.
		4. Answer these 4 questions: a. What is the problem? b. What are the possible causes of the problem? c. What are the possible solutions? d. What is the best solution?
		5. Don’t fuss about trifles.
		6. Use the law of averages to outlaw your worries.
		7. Decide just how much anxiety a thing may be worth and decide to give it no more.
		8. Expect ingratitude.
		9. Create happiness for others.
		10. Put enthusiasm into your work.
		11. Remember that unjust criticism is often a disguised compliment.
		12. Count your blessings, not your troubles.

Notes:

My biggest take-away from today's workshop is:

As a result of what I have learned today, one thing I will do differently (starting today) is:

Who will I engage to be my coach / encourager / accountability partner in the action I am taking?

Notes:

“If you are not in the process of becoming the person you want to be, you are automatically engaged in becoming the person you don't want to be.” – Dale Carnegie