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## Customer Communication Etiquette and Standards

### Customer phone contact:

When receiving incoming calls, it is important to remember you may be the first person from our organization to speak to a customer. It is often said, “You only have one chance to make a first impression.” What do you want that impression to be? We are a service provider, striving to create a positive experience for those with whom we interact, both internally and externally.

People appreciate it when you remember and call them by name. It helps build a relationship with our customers. Use the words “please,” “thank you,” and “How may I help you?” These words alone will take you far in reaching our customer service goals.

It is expected that you will follow minimum guidelines when interacting with customers through any channel. You might want to use somewhat different words than in the examples below, and you will have to adjust to each situation. Following customer interaction guidelines provides an opportunity to show how customers can expect to be treated each time they contact anyone in our organization.

### Customer Interaction Suggestions

#### Example 1 – Answering the phone:

“Good morning, this is William with the Bureau of Publishing and Distribution. How may I help you?”

If you can answer the caller’s question, provide the answer. Inform the Customer Service team or appropriate staff via email from the Publishing or Distribution mailboxes.

Thank the customer for their call and ask if they need any follow-up, as needed/appropriate.

If you are unable to answer the caller’s question, tell them you will check with your resources and either you or someone from the Customer Service team will follow up with them within a set amount of time.

#### Example 2 – Calling the customer:

Customer: “Hello, this is Susan.”

CS staff: “Good morning Susan, this is William with the Bureau of Publishing and Distribution. I am calling to follow up on the banners and panels that you ordered yesterday. Have you finished proofing all of them? You mentioned that you would like them by Friday.

Customer: I’m sorry, William, I haven’t had a chance to proof the documents. I will have time today.



CS staff: Thank you, Susan. If I don't hear from you by 10:00 tomorrow morning, I will follow up with you by phone and email.

Have a great day!"

### **Example 3 – Placing the caller on hold**

CS staff: "Good morning, this is Samuel with the Bureau of Publishing and Distribution. How may I help you?"

Customer: "Hello, this is Amy. Can you tell me how much it would cost to print 5 copies of a 25-page training manual?"

CS staff: "Amy, would it be okay if I place you on hold briefly while I have my Customer Service Team member pick up the line to assist you?"

CS staff: Place caller on hold. Inform CS Team member Amy is on the other line and ask him/her to pick up.

CS Team member: Follow same protocol as above.

### **Customer email contact:**

As with phone contact, the way we communicate with customers via email is critical in building rapport. Emails, like phone calls, create a perception of the person, and their respective agency sending them. Ask yourself, are my emails friendly, professional, responsive and helpful? Always use "please" when requesting anything of your customer. Always end your emails with "Thank you." Use "Best regards," "Sincerely," "Have a great" day, or another professional closing.

Even the font used can give a perception of the person sending an email. All capital letters, or bolding, might suggest impatience or that you are being bothered by a request. If it is necessary, bold fonts and colors should only be used to highlight specific information. It is important to always offer excellent customer service, even during difficult interactions.

Using a name stamp only at closing seems insensitive.

Thank you,

**Beth Marks** | Customer Service Representative

Department of Administration

Division of Enterprise Technology

Bureau of Publishing & Distribution



Instead, always type your first name above your name stamp.

Thank you,

Beth

**Beth Marks** | Customer Service Representative

Department of Administration

Division of Enterprise Technology

Bureau of Publishing & Distribution

Consistent messaging builds trust. These specific guidelines are expected in your email communications. As you build rapport with your customers, you will develop your own style; however, you must follow consistent standards.

### **Greetings/salutations guidelines:**

#### **Examples:**

Good morning Judy,

Hi William,

Hello Max, I hope you are doing well.

#### **Body of email:**

It is important that you describe what you want within the first or second sentence. Provide the background after you have asked for what you need from the customer. Remember, no capital or bold letters if unnecessary for highlighting.

#### **Example:**

Hi Susan, will you still be able to get us your print file by noon today? I just wanted to follow up to ensure we can meet your mailing deadline of the end of the day tomorrow. As we discussed, your job will take approximately 8 hours to print and 4 hours to insert and I wanted to be sure we are on track. Are you able to move your mailing back a day if you are unable to send the file by noon?

### **Closing minimum:**

#### **Examples:**

Thank you, Susan,

Brittany



Have a great rest of your day Mark!

Thanks,

Fred

### **Customer face-to-face contact:**

Face-to-face contact with our customers is less common. Generally, the concepts of face-to-face contact are the same as spoken or written. However, this can be an opportunity to put a face with the name of a customer you have interacted with on the phone or by email. Will they see the same person? They should! It is important to exhibit consistent excellent customer service, regardless of the communication channel.

Whenever anyone enters the customer service area, say hello and ask if they are here to see someone. If not, ask if there is something you can do to assist them. If there will be a wait for a team member to meet with them, make them feel comfortable and show them where they can hang their coats as well as where they can find the restrooms. Offer the customer a seat in the waiting area. Excuse yourself and notify the person they are here to see that they have a visitor or that someone has arrived for their scheduled appointment. If you know the conference room has been scheduled for the appointment, you may offer to escort the customer there and inform other meeting participants their guest has arrived.

#### **Example 1:**

CS Staff: "Good afternoon Frank and welcome! It is so nice to get to meet you in person and put a face with a name. How can I help you today?"

Customer: "I've never seen your operation before and thought I would stop by to see all the services that you have to offer. Is it okay that I just dropped in like this?"

CS Staff: "Absolutely Frank. Would you like to take a tour?"

Customer: "Wow, that would be great. Do you have time right now?"

CS Staff: "Yes, Frank. Will you please sign into the visitor log? The time is 10:28 a.m. Please wear this visitor's badge while you are here and turn it into me or one of my teammates when you sign out. We are a secured facility, so someone will accompany you from here."

#### **Example 2:**

CS Staff: "Good afternoon sir, how may I help you?"

Customer: "Hello, my name is Bill. I am here to pick up a copy of the uniform building code."



CS Staff: "Nice to meet you Bill, I'm Mark. We have that available for you now. The cost is \$30.00. Will you be paying with cash, check, or credit card?"

Customer: "I'd like to use my Mastercard."

CS Staff: "Thanks Bill. I'll be happy to take care of that for you. May I process your credit card?"

Customer: "Sure, here's my card."

CS Staff: "Bill, this is the copy of the uniform building code and your credit card receipt. By the way, are you aware that you can also order this and other products online through our Document Sales website?"

Customer: "No, I wasn't aware of that. Thanks for letting me know. It may save me a trip next time."

CS Staff: "Thank you Bill. We appreciate your business. Have a great day."

### **Taking ownership, resolution, and recovery from errors:**

Errors are going to happen. They happen to everyone. It is about taking ownership and resolution of the error. In other words, acknowledging you made the error, apologizing, and making it right for the customer. Even if you did not make the error yourself, blaming someone else does not make it go away. It simply shifts the blame. That is the last thing a customer wants to hear. Remember, you are part of a team and it is important that you take ownership of errors as part of that team. Taking ownership and finding a way to recover from an error can go a long way toward retaining business and building an even stronger relationship with your customer. They are looking for resolution.

Having an established level of authority on how much you can do to make it right is also important. For example, a policy may be that anyone on the customer service team is authorized to reimburse a customer for staff-related production errors up to a specific amount. When these types of situations happen, a thorough internal review should be completed, and corrective actions taken as necessary.

#### **Example:**

CS Staff: "Good morning, Publishing and Distribution. This is Winston. How may I help you?"

Customer: "Winston, this is Mark. We received several of the postcards back from our mailing that didn't have a city, state or zip code."

CS Staff: "I'm sorry to hear that Mark. I truly apologize. Would it be alright if I get back to you in an hour after I have had a chance to research what happened?"

Customer: "That would be fine Winston, but I have to get this corrected today."



CS Staff: "Absolutely Mark. I will follow up with you in an hour or less."

**Follow- up, resolution, and recovery:**

Customer receives call from CS Staff: "Good morning, this is Mark."

CS Staff: "Good morning Mark, this is Winston. I am following up on your postcard mailing. Is this a good time for you?"

Customer: "Yes Winston, thanks for following up so quickly."

CS Staff: "Mark, I was able to find out what happened with the postcards that were returned. Again, I apologize for the impact this has had on your customers. It was a processing error on our end that was not caught during the proofing process."

Customer: "Oh, I appreciate you letting me know that it wasn't a problem with the file we sent, and mistakes do happen."

CS Staff: "Mark, I can offer to do your complete mailing again or mail to the individuals whose cards were returned. Either way, it was our error and we will cover the cost."

Customer: "Thanks Winston. Just mail to the customers whose cards were returned. That's all we would like. How long will that take?"

CS Staff: "We can print and mail the postcards today. I'll follow up with you when they have been completed and delivered to the USPS."

Customer: "That would be great. Thanks Winston."

CS Staff: "Have a great day Mark!"