

## Virginia Wesleyan College Customer Service Guidelines

The foundation of good customer service can be summed up in one (golden) rule: Strive to treat your customers the way you wish to be treated when you are a customer.

You have both external and internal customers. External customers are your outside contacts, such as prospective students, parents, vendors, etc. Your internal customers are students, faculty and colleagues from other campus offices or departments. Both internal and external customers need to be treated with respect and courteous attention, offered help, and given clear and thorough responses to their inquiries or requests—just as you wish to be treated yourself.

However, good customer service extends beyond personal interactions to include:

- Being accurate and careful in your work.
- Having procedures that are both transparent and efficient.
- Constantly striving to make policies and procedures customer-friendly.

If the guidelines and observations below are followed by every employee at Virginia Wesleyan, both your own work performance and the experience of the customers you serve will be as positive as possible.

### **Special Communication Guideline: Communicate to the Community**

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While strong communication skills and awareness are a feature of many of the guidelines below, it is especially important to think and communicate about:

- How the college community, or specific individuals or offices, might be affected positively or negatively by your actions or programs.
- What the community, or specific individuals or offices, need to know about your actions or programs.

It should be standard for all college employees to communicate clearly in advance (via e-mail, voice mail, and other notices) if you plan to be away from your office or close down an office for a period of time, offer a campus program that might affect others, or do something that may need special explanation (e.g., an activity that might alarm people who are unaware that it is an exhibit or illustration). Offices with particular need to know what is happening on campus, who should routinely be informed, include:

- The switchboard receptionists (to whom others often go for information)
- Campus Security
- The Admissions Office (so they can explain matters to visitors)
- The Office of College Communications

## Customer Service and Institutional Service

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Some of the challenges of customer service occur when customers' interests or wishes collide (or seem to collide) with Virginia Wesleyan College's interests, policies, or procedures.

- In some situations, exceptions can be made for individual circumstances.
- In other instances, a customer's request cannot be fulfilled because of institutional issues such as the following:
  - The College's need to comply with external requirements (e.g., of the government, a granting agency, accrediting bodies, our insurance providers, etc.)
  - The College's need to protect individual safety and institutional liability
  - The College's wish to apply its policies fairly and consistently
  - The limitations imposed by a computer program, by financial considerations, by one office or department's need to coordinate its procedures with others, etc.

Many customers will respond positively if you explain pleasantly and succinctly why their requests cannot be fulfilled as stated, particularly if you follow the general guidelines below.

## General Guidelines

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- Be knowledgeable about your own duties and your department's services.
- Be knowledgeable about the services and resources offered by other departments at Virginia Wesleyan.
- Strive to give accurate information. If that means taking extra time to determine or confirm a fact, do so. In that case, explain to the customer that you need more time to determine the accurate response.
- Phrase your response to emphasize what you can do for your customer, rather than what you *can't* do. ("Let me check on that for you," rather than "I don't know." "This is what we could do instead," rather than "You can't do that.")
- Listen to what the customer is saying. Don't try to guess what the need is or make a judgment before the customer has finished explaining.
- Avoid using technical jargon or local acronyms when speaking to a customer. Also remember that a term that is familiar to you may be unfamiliar to others (e.g., "matriculate, to withdraw from or drop a class, LAMP program, grade of Incomplete, tuition deferral, Frames of Reference, Village II"). Respond patiently and explain further if the customer doesn't understand or seems confused.

- Always practice patience.
  - If a customer asks you a question that you already have answered many times today, don't show exasperation and then give the answer reluctantly. Remember, this is the first time THIS customer has asked you the question.
  - Likewise, if a customer asks you the same question that s/he asked you last semester or last month, remember that while procedures and policies you employ regularly are familiar to you, other people who encounter them less frequently may need reminders.
- Once you know the customer's name, refer to him or her by name. Get to know the name of regular customers and greet them by name each time.

### **In- Person Guidelines**

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- Be approachable and aware of how your customers view you.
  - Stop what you are doing and give the customer your undivided attention.
  - Acknowledge and greet people with a positive and helpful demeanor. If you are assisting someone else when a new customer enters, acknowledge the new customer and state that you will help as soon as you can.
- Be aware of customer confidentiality if there are other customers or staff nearby. If necessary, take the customer into a more private area to discuss confidential information or a difficult issue.
- Departments need to establish whether a telephone call or a walk-in customer has priority. The customer placed "on hold" (on the phone or in person) needs to be told the situation and assured of receiving service as soon as you have finished your business with the other customer.
- Make eye contact.
- Dress appropriately for your job within the guidelines of your department.
- Wear your VWC name tag; it will help customers get to know you.
- Always follow up on your promises to customers by the time you pledged — even if it's to say that you don't yet have the information they wanted and you'll get back to them later.

### **Telephone Guidelines**

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#### *Answering the Phone*

- Answer the phone promptly.
- Greet the caller by identifying the department and yourself, e.g. "Good afternoon, Business Office, this is Elaine speaking."
- Ask how you can help your caller.
- If the person the caller seeks is not available, don't respond by saying only, "I'm sorry, s/he's not here." Ask if some else can help instead; if not, offer to take a message or transfer to the person's voice mail.

- When using a multi-line phone and both lines ring, ask the first customer if you may place the call on hold for a very short time, and wait for the customer's reply. Then answer the second line and offer the caller the option of waiting on hold until you finish the first call or giving you a number so you can return the call after you finish the first call.
- When writing a message for a co-worker, write the caller's full name, number, time of call, a brief message, and your name.

#### *Placing a Call on Hold*

- If you need to place a call on hold, explain your reason and when you expect to be back on the line, or ask if the caller would prefer to be called back. (Not “Hang on a second,” but, “It may take me several minutes to find that. Would you prefer to wait or to have me call you right back?”)

#### *Transferring a Call*

- If you need to transfer a call, let the caller know, and always give the number of the department to which you are transferring the call.
- Stay on the line until the department/person answers, identify yourself, and note that you are transferring the call. If voice mail picks up, return to the caller and give him or her the option of calling back at another time or of being transferred to voice mail.

### **Voice Mail Guidelines**

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- Record a personal greeting. Your personal greeting should state exactly what is happening. E.g., "Hi, this is Mary Dunn, Customer Service Manager. I'm in the office today but unable to take your call at this time. Please leave a message at the sound of the tone and I will return your call as soon as possible. If you need immediate assistance, please call...."
- Record and use an alternate greeting when you are going to be out of the office for a day or longer. "Hi, this is Mary Dunn, Customer Service Manager. I'll be out of the office on Tuesday, October 2. Please leave a message at the sound of the tone and I will return your call as soon as possible. If you need immediate assistance, please call...."
- Respond to all messages promptly.
- All departments should have a policy for responding promptly to messages left on the main department line when that number is left unattended.

### **E-mail Guidelines**

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- Understand your department guidelines for checking e-mail. Respond promptly if the e-mail requires a response, even if only to acknowledge receipt of the message while you work on the request.

- If you are unable to respond to e-mail for more than one day, post an auto-reply message that states when you will be able to respond and gives an alternate contact for use in an emergency.
- Always use the subject line to give yourself and your recipient a brief but informative description of the topic of the message (e.g., “Customer Service mtg., Oct. 2”).
  - Edit the subject line in your reply when the subject line becomes cluttered with "Re" statements.
- Keep messages and responses simple.
- Where an e-mail signature is required, use a standard signature that includes your name, title, department, phone, and fax number. Include a mailing address or the college web site address for the convenience of off-campus correspondents.
- Use the conventions of standard professional English in writing, including correct grammar and spelling. Avoid using text message abbreviations.

### Problem-Solving Guidelines

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Remember the foundation of customer service: to help solve your customers' problems in the same way that you would like someone to respond when you have a problem. To achieve the best possible outcome, use all available means and resources, recognize that this may take time, and communicate clearly with customers about the time frame and the steps that you and they may need to take to achieve a solution.

- Ask open-ended questions.
  - "How may I help you?"
  - "What type of problem are you having, or what type of information do you need?"
- Let the customer explain fully what he or she is experiencing, and listen attentively. Avoid making a decision before the customer is finished with the explanation.
- Restate the request to confirm your understanding.
- Provide answers, but don't be afraid to say, "I don't know, but I'll find out for you."
- Suggest possible options; provide an alternate course of action, if possible and appropriate.
- Avoid saying, "I'm sorry, they must have made a mistake in [that other] office." Instead, say something like "I'm sorry that you are having this difficulty, but I'll look into correcting it." (Show that we're a team at VWC, and focus on solving the problem.)
- If an error has been made, correct the problem or indicate that it will be corrected, and thank the customer for bringing it to your attention.
- Ask if there is anything else the customer needs from you.
- If you are unable to answer the question immediately, ask the customer to indicate the best way to reach him/her once the issue has been

- addressed, and say when you will be in touch again. (“I’m sorry, there is no one available to answer that question for you right now, but I promise someone will get back to you by 10 a.m. tomorrow.”) Offer additional follow-up/contact information as appropriate.
- In some situations, a satisfactory solution may not be apparent. If you are unable to resolve the matter to the customer's satisfaction, get help from your supervisor or refer the customer to the appropriate source.

## **Working with Difficult Customers**

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Sometimes you may have to confront difficult situations in dealing with customers whose behavior is highly emotional, distraught, or aggressive. The following are some guidelines for continuing high quality customer service while dealing with problematic situations:

- Stay calm and do not become defensive. Do not take customers' frustrations personally.
- Remember good listening skills. Let customers finish explaining their concerns, and give those concerns credibility.
- Be courteous. Assure your customers every effort will be made to address their issues. Focus on finding solutions.
- Follow up with your customers, either by phone or e-mail, to make sure the solutions work. If you find out the customers are not satisfied with the solutions, continue to look for other solutions.