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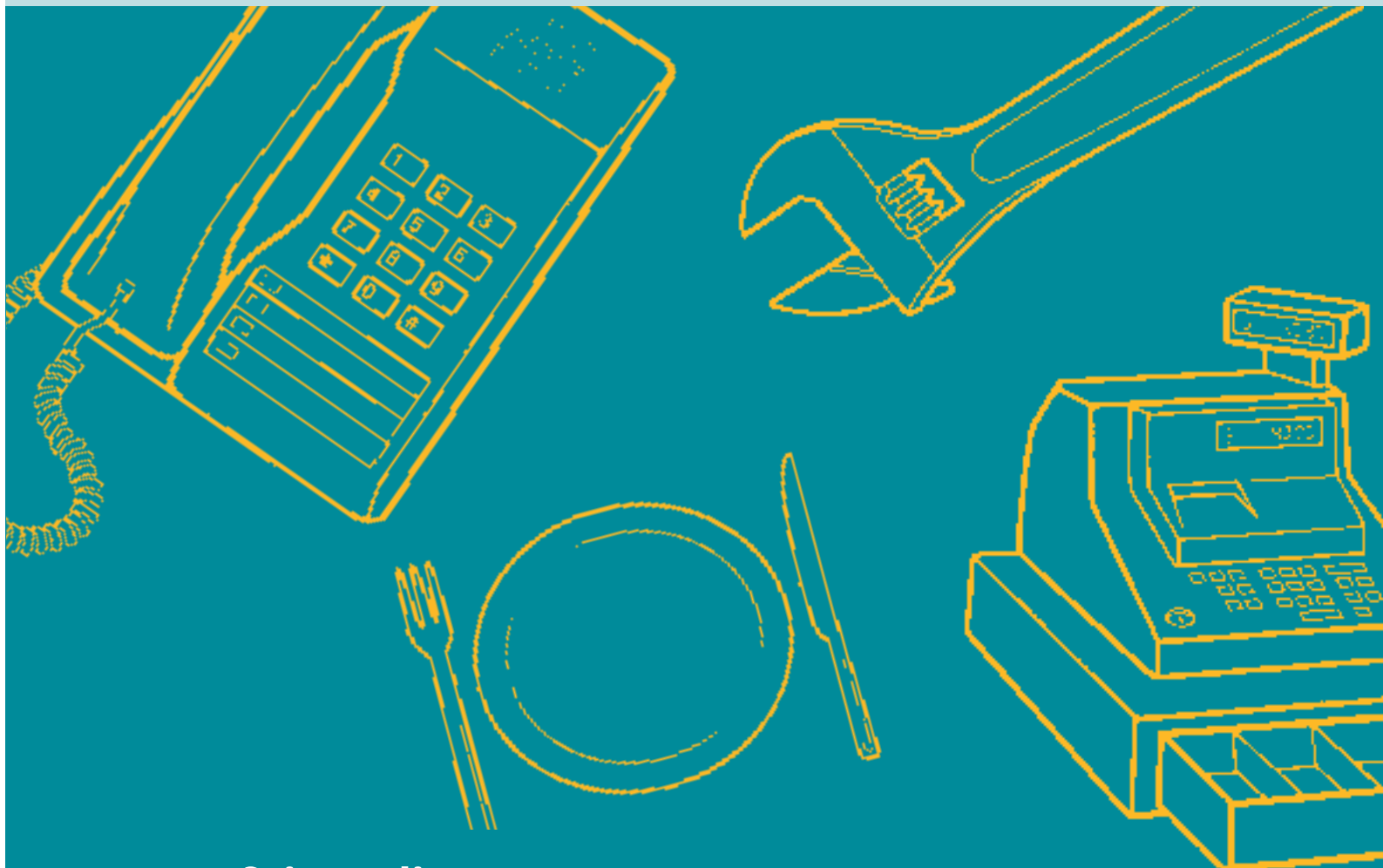
**Department of Commerce**

# The customer service guide

How happier customers lead to healthier business

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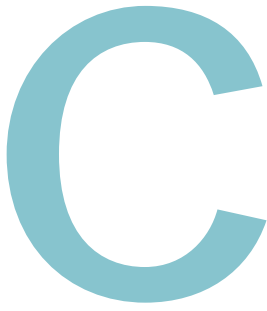
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# G

# ood service is good business

Customers, and customer service. Both go hand-in-hand, and both are essential to the success of your business.

In today's competitive marketplace, if you don't provide good service you won't attract customers. And without customers, you don't have a business.

Customer service is real, it matters, and most importantly, it is achievable.

Providing good customer service it is not as hard as it sounds. You don't need to do a business course, you don't have to send your staff off for weeks of training and you don't have to invest thousands of dollars.

Despite all the talk, there are only four simple questions you need to know.

## What is good service?

Good service is always doing the right things the right way for customers.

## Why should you do it?

Good service leads to increased customer satisfaction. This satisfaction builds customer loyalty and in turn contributes to improved business profits. Good service is good business.

## What's in it for my customers?

It makes it easier for them to deal with you, they are more satisfied with you and they will want to do more business with you.

## How will you know when you are doing it right?

Your current customers will keep coming back, new customers will be referred to you from your existing customers, and your business will show the returns.

*The Customer Service Guide* provides the keys to help you provide successful service, and a successful business.

It contains simple guidelines designed to assist you in strengthening the service you provide to your customers. These guidelines are just that, *guidelines*, and can be easily balanced with your business requirements.

## Importance of customer service acknowledged

*At the risk of stating the obvious – customer service IS important.*

In today's competitive market, it would be hard to find business people and staff that say the concept of customer service is not important – although their action may not match their words. Certainly customers are becoming increasingly vocal about the high priority they place on customer service, and businesses are feeling this pressure. As one recent headline succinctly put it, "Companies sink low in customers' esteem", with concern about issues of customer dissatisfaction, poor service quality and only token respect for customers.



The importance of customer service is also reflected by business managers who consistently place customer satisfaction at the top of the list of factors they believe directly affects their business success (Australian Financial Review, May 1998, BRW July 1998).

## A clear lack of service improvement

Why then is there a lack of any significant sustained improvement in service in Australia? At best it could be claimed business is just keeping up with customers' expectations, at worst that service levels are in fact declining.

The lack of any notable improvement in service in Australia is in part associated with three key factors:

1. Businesses' inability to know how to define service in a way that means something to customers and is capable of practical action.
2. Businesses are also suffering from not knowing how to deliver such customer-focused service.
3. Too many managers are not acknowledging that they could improve their business' service.

And all this is operating along with a strong emphasis on cost reduction. Hardly the environment for improved customer service.

## Customer service – a simple concept confused by jargon

Despite the apparent simplicity of the concept of customer service, the language surrounding the whole push towards customer service has developed at a rapid and often confusing rate. Many terms are vague, and do not necessarily contribute to a greater understanding of the basic concept of customer service. Catch-cries often heard, but perhaps not fully understood, include:

- customer loyalty, and is loyalty different to “loyalty” programs
- adding value to customers, and service profit chains
- providing legendary service, exceeding expectations, or delighting customers
- meeting customers' needs
- achieving world's best practice, or benchmarking against “best in town”
- service performance, expectations, tolerance zones, and gaps
- return on quality, total quality service, and total quality management

and on and on back into service history.

All too often, the latest “fad” was promoted as a replacement to the earlier concepts, when in fact all essentially build on each other.

What is common to all, is the fundamental principle of customer satisfaction. And what has been repeatedly and consistently shown as the key driver of customer satisfaction? The quality of the help and service provided to the customer.

*In other words – **customer service IS important.***

In its simplest form, the relationship is clear, logical and direct ...

| Service inputs                        | Outcomes achieved                      |
|---------------------------------------|--|
| Good service quality ... leads to ... | Increased customer satisfaction        |
|                                       | ... which builds ...                   |
|                                       | Stronger customer loyalty              |
|                                       | ... which contributes to ...           |
|                                       | Improved business outcomes and profits |

It is like any basic input/output model. The better the customer service input, the greater the customer satisfaction output.

For many years, leading companies that were committed to the concept of customer satisfaction accepted the principle that improved service quality led to increased customer satisfaction and in turn to greater business success. It made perfect common sense, even if it couldn't be easily proven on the profit & loss balance sheets.

Since then, an increasing number of research studies and business books have proven the direct relationship between customer service and profitability. They have found that customer service is important. It matters to customers.

And, as it directly affects the success of any business, *it matters to you.*

## Defining customer service – a practical definition

So you accept it is important, but what is customer service?

Customer service is about what a business does where it directly involves customers, or has an impact on customers.

It is an end-to-end series of activities (a process) by which a business deals with its customers. In such a process, all of the various interactions or “moments of truth” (as business writer Jan Carlson started calling it in 1987) when you interact with customers are interrelated parts of a whole experience – not discrete, unconnected transactions. Good service is about getting all parts of the process right. Therefore, like any chain, the service is only as strong as its weakest link.

A definition of service must also be closely related to the definition of customer satisfaction, as it is the customers' perspective that matters most. But as one writer put it, Everybody knows what satisfaction is, until asked to give a definition. Then it seems, nobody knows (Oliver 1998).

A good practical definition of satisfaction that covers many of the concepts written and spoken about customer satisfaction over 15 or more years, is:

### Customer satisfaction is ...

The customer's impression that the service provider has done something worthwhile, done in the way the customer wants it done

From a business point of view, this can be turned into:

### Providing excellent service means ...

Consistently doing something of value for customers in the way customers want it done. Or more simply – “Always doing the right things right”

The clear emphasis in this practical definition is on the behavioural aspect of doing. It is what you do for the customer. What you do needs to be of worthwhile value to the customer, and it should be done in a way the customer is happy with.

Of course this needs to be balanced with what is achievable within your business context. However, it needs to be appreciated that the customer has the final say over whether they were satisfied with the service or not.

Remember that the “input” to your relationship with customers is the quality of your service.

It is also important to recognise that providing good service relates to anyone you are dealing with – not just “paying customers”. Providing poor service to someone because they aren't a “paying customer”, or they don't spend much with you, is a definite way to ensure they won't want to do business with you in the future. These people will also go around telling others of their bad experience with you.

***The “measures” or elements of good service involved in this definition are:***

**Elements of good service**

Your reliability

Quality of your performance

Worthwhile outcome for the customer

Overall service effect

**Which involves ...**

Providing consistent service that a customer can rely on

Making sure that you do things very well

Ensuring what you do is of value or worthwhile to the customer to achieve their desired outcome

The ability to provide end-to-end service across all your dealings with a customer

The secret lies in making sure everyone feels they are getting your special treatment.

## The bottom line impact of customer service

Service is important but it is not just about satisfying the customer. There must be a “pay off” for the effort, and there is.

Research and case study experience has repeatedly shown that there are many business benefits achieved by providing customers with high quality service (Harvard Business Review 1993, Oliver 1998).

The benefits are certainly there to be gained but can also be quickly lost as the reverse is also true. Customers are becoming increasingly intolerant of long-suffered poor service. There are now serious business implications if you deliver poor quality service to your customers – or soon to be ex-customers.

From a business perspective, the benefits of good service are many, as it leads to greater revenue from customers, reduces your operating costs and in turn provides for a healthier business.

These are now briefly discussed.

### **Benefits of good service are many, including ...**

- Increased customer retention rates
- Attract new customers through positive word of mouth
- Reduced costs of running the business
- Reduced marketing costs
- Stronger position in the competitive market place
- Able to differentiate service as a competitive advantage
- Increased staff and job satisfaction
- Increased profits



## Increased customer retention rates

It has been repeatedly shown that good service leads directly to increased customer retention rates (Oliver 1998, Nett Effect 1997-98). The emphasis here is on good. You can't expect customers to stay simply because the service wasn't bad. In other words, the service has to be of a high standard to genuinely keep customers.

One estimate suggested 95% of customers that experienced no problems will remain loyal, and another suggested that over 90% said they would buy from the supplier again if they had no problems (SOCAP 1995).

## Reduced costs of running the business

Such reduced costs can result from a variety of factors, including:

- Increased customer retention rates means the resources associated with setting up the customer's details are reduced to only once over a long time period, compared to a constant stream of new customers coming in as others leave.
- Similarly, regular customers can be serviced more efficiently. As you are more familiar with the customer's requirements, you can service them more effectively. Likewise, they have learnt how to deal with you and know what to expect from you, and this also increases the efficiency of servicing them.
- Good service where you keep customers informed of what is happening means customers are not repeatedly contacting you to find out about things.
- Doing things properly the first time means there are no expensive costs for rework.
- Good service means lower complaint rates, and therefore less time and cost involved in dealing with such complaints.

## Reduced marketing costs

Many studies have shown that it costs around 3 to 5 times as much to attract a new customer compared to making the same sale to an existing customer (McColl et al 1998).

Customers can take on part of your marketing function by making recommendations and referrals for you. Such personal referrals are one of the strongest influences on service adoption, and hence the strongest form of marketing (Sharp 1996).





## **Stronger position in the competitive market place**

Studies have shown that companies identified as being good service providers tended to have revenue growth at twice the rate of their poor service competitors (DeVrye 1994). A related finding was that the good service companies market share increased by around 6%, while poor service companies lost approximately 2% market share per year.

It has also been shown that good service businesses have a greater ability to hold market share during a recession (Lyons 1994).

## **Ability to differentiate from competitors in the market on the basis of service**

Many companies claim “service” will be how they differ from their competitors, but cannot deliver on the promise simply because their actual service standards aren’t up to scratch. Customers know when someone can legitimately claim such a position, and will leave companies who over promise and under deliver.

## **Increased staff and job satisfaction leads to higher revenue and profits**

The vast majority of staff genuinely want to do a good job and customers that are very satisfied are often most satisfying for employees to work with (Frow 1996). Seeing good service reflected in increased customer satisfaction leads to greater job satisfaction, lower absenteeism and reduced staff turnover.

One study found that the store with the lowest staff turnover rate experienced the highest rate of sales and higher profits compared to the store with the highest staff turnover (Pepsi Co’s Taco Bell).

## **All this leads to increased profits from customer retention**

Again, many studies have identified the higher profits that flow from increased customer retention (Reichheld & Sasser 1993, Ferguson 1994, Hadrill 1995, Oliver 1998). By keeping customers longer, this means that customers will spend more with you over time (revenue), while your costs to service existing customers are lower than new customers.

Reports of such increased profits vary by industry, but have been as high as 95% and at least 25% simply flowing from a 5% increase in customer retention (Bain & Company Study referred to in Payne 1996). And the profit increase is not confined to just the first year. Studies have shown that the profit margin for retained customers increased each year for five years (Reichheld & Sasser 1993).

There are many reasons outlined in these and other studies as to why customers that stay with you for a long time are more profitable, including:

- they are more likely to make repeat purchases of the same goods and services, more likely to purchase your other products or services, and often maintain higher balances/accounts with you
- reduced operating costs to service them
- increased positive referrals, and avoidance of any negative word of mouth
- ability to charge price premiums, with estimates of around 10-15% (DeVrye 1994).

*These are impressive benefits that are very hard to ignore.*

## The reverse case – poor service drives customers away

The down side is that if you do ignore the importance of service, it is not a matter of nothing changes. If the service you provide is poor, then you are actively driving your customers away.

However, in many respects some of the impacts of poor service are not as readily apparent – at least not in the short term.

A real worrying factor is that often you will be the last person to hear about the customer's poor service experience with you. Within Australia, the vast majority of over 80% of people who receive mediocre or poor service do not complain to the service or goods provider (TARP 1986, ACSA & Nett Effect 1996).

Only when things get really bad will customers resort to formally complaining about their serious problems. The SOCAP 1995 research has shown that around 73% of people complain when things go badly wrong. So even then, 27% will still not complain.

While this is bad enough, it doesn't stop there. It is not that they don't talk about the bad service, they just don't talk about it with you. What customers do is go out and tell others – friends, family, colleagues – about the poor service. It is estimated that a person with a complaint is likely to tell 9 others about the bad experience – including naming the company involved (TARP).

Rather than complain, Australian customers are more likely to talk to their friends, and “talk” with their feet by simply taking their business elsewhere.

There is no doubt that having a complaint/service recovery process in place is very important for those times when unfortunately things do go wrong (McColl et al 1998). However, it is dangerous to think that you can turn customers who

complain about your service into your biggest loyal customers. Common sense dictates that it is much better to get it right in the first place, rather than having to make a super (and costly) recovery effort to win the customer's ongoing support. This common sense is backed up by research.

Even when you do hear about the complaint, and make a strong recovery, you will still lose around 10-30% of these customers after only their first complaint. And if problems continue to occur, then the rate of customers returning after recovery drops off very quickly. Studies have shown that of the customers who have experienced 3 or more mistakes, less than 20% of them will come back (US Office of Consumer Affairs, SOCAP 1995).

The adverse consequences of very poor service are quickly apparent.

What is often not fully recognised is that providing only mediocre service also has its costs. Even when things don't go badly, it is estimated that around 12-16% of customers will still leave, because they were not totally satisfied with the service (Sharp 1996).

It is only through completely satisfying customers that true loyalty is built.

## Customer service in Australia – how are we going?

As outlined above, customer service is an essential part of business within Australia. But how good is the service provided by Australian businesses?

In short, the service is far from great.

Ask any customer about a “service experience”, and they are far more likely to recount in great passionate detail a horror story. It is the problems that get remembered, and these can be very ugly. Good service stories are not nearly as easy to find. Managers themselves also often refer to complaint recovery stories, rather than emphasise the importance of getting it right

the first time. Alternatively, managers talk about the high cost of service, and the need for greater efficiencies and operating cost reductions.

## The service managers' perspective

Despite all the talk, businesses' practical achievement in service improvement has been slow in Australia. As one of the leading experts in service, Karl Albrecht found in 1994, Australian companies do not have high quality service. In a survey Albrecht managed through the Australian Institute of Management, he found that many, if not most, of the quality improvement programs in Australian organisations fail to achieve their goals. And these results came from business managers themselves. The survey indicated that almost half of the managers believe that even the best companies in their industry did not provide very good or excellent service. The three main factors causing this failure included:

- lack of a truly customer-driven focus
- lack of management involvement
- lack of a process for changing organisational culture.

Unfortunately, current trends indicate nothing has really changed, with one of the major problems being that managers do not believe that their service needs to be improved. The common view is that we're OK, it's just everyone else that needs to lift their game.

## The Australian customers' perspective

With managers hardly complimentary about Australia's service, what about customers? How do they rate service in Australia? The Australian Customer Service Association (ACSA) & Nett Effect Service Australian Style Research Program (1995-97) has found an equally concerning picture. The research found that each year, 95% of customers will experience poor service somewhere. This leaves only 5% who do not experience any service problems. These are not isolated

occurrences either. In fact, it was found on average, 26% of customers will encounter poor service each month in Australia. SOCAP (1995) also found that 57% of customers had at least one service problem.

## The international visitors' perspective

The final perspective is that of international visitors in terms of how service in Australia compares to other countries. The Benchmarking Australia's International Service Report (ACSA & Nett Effect 1997) found that for 65% of visitors, the service was below what they expected at some point in their stay in Australia. Only 38% of international visitors said the service they received in Australia was better than what they receive at home.

## Fans, fence sitters or critics – where are you in the service profile?

Across numerous customer satisfaction surveys in Australia, typical "Service Profiles" have emerged, and the associated patterns of customer satisfaction that often follow. Typically in Australia, service could be grouped into three.

### 1 Excellent service

...leading to completely satisfied customers

These businesses have customers who are their "fans" they can rely for their loyalty.

### 2 Mediocre service

...leading to non-committal satisfaction

These businesses have customers who are "fence sitters" where the relationship is only as good as the last encounter.

### 3 Poor service

...leading to customer dissatisfaction

These businesses have customers who are their vocal "critics", who will be actively looking to deal with someone else and telling others how bad the service is.

Within Australia's service environment, few businesses are entitled to claim they provide across-the-board excellent service in everything they do (Mackay 1993, ACSA & Nett Effect 1997).

The big question is, no matter where your business sits, how can you improve? The answer lies in the sustained, enthusiastic pursuit of best practice customer service in the 10 most critical customer activity areas outlined in the following pages.

These are not complex, costly recommendations, nor are they difficult to manage. Rather, they are a set of simple activities, capable of practical, cost effective implementation today.

*And the financial business returns will be there for those who do!*

## Good customer service fits well with "fair trading"

It is important to remember that your business also has a obligation to meet the requirements of the law as part of providing good service. This is the concept of "fair trading" where businesses operate in a competitive environment and consumers are provided with basic protection.

Federal and state governments administer laws which govern fair trading in the day-to-day operation of your business.

Essentially, fair trading legislation aims to ensure that goods and services are fit for the purpose for which they are sold and prohibits misleading, deceptive and unconscionable conduct.

Misleading and deceptive conduct is when you lie or give people a wrong impression of a product or service, while unconscionable conduct is when you take unfair advantage of vulnerable consumers. In both cases, there are unpleasant consequences for breaking the law. Not only do you face fines and in some instances gaol sentences, you stand to ruin your business reputation in the eyes of your customers, lending institutions and industry organisations.

Knowing how to comply with fair trading laws is not as hard as you may think. Many government bodies provide information to help your business cut through the legal red tape. Organisations such as Business Entry Point and Business Licensing Information Service (BLIS) provide one-stop-shops for government and legal information relevant to your business (see page 37 for contact details).

In general, applying these customer service guidelines will greatly assist in making sure good service is well matched with fair trading – representing a win-win situation for your business and your customers.

### Case study

Giving your customers and staff the opportunity to register their comments about your organisation is an effective way of measuring customer satisfaction. **Telstra Stadium** winner of the Parramatta Regional Award for Excellence in Providing Service to Customers and Clients in 2001, has as part of its QA accreditation a Customer Comment Register.

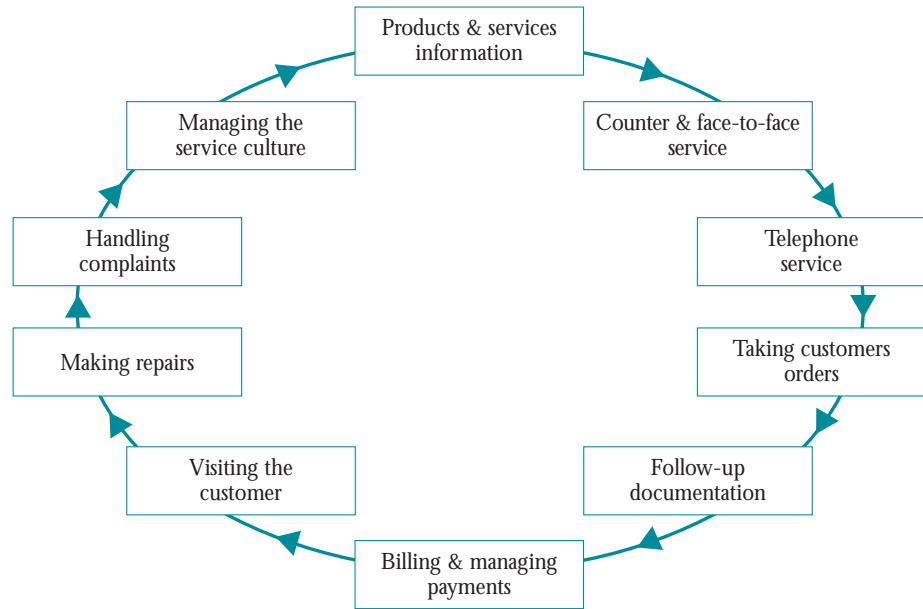
This Register enables Telstra Stadium to track recurring issues, take

appropriate steps to address them and measure customer satisfaction. Telstra Stadium fosters a culture of excellence in their staff, which is reflected in their Mission Statement.

Given the size of the organisation there is no reason why smaller businesses cannot strive to put in place similar complaint register systems for the benefit of their own business.



# The 10 key service activities



## Customer service guidelines

Customers go through a fairly typical sequence of activities or process when dealing with businesses. Although it depends on the type of business you are in, from your perspective, there are 10 key areas of activities that could flow between yourself and customers and affect your service to customers.

These are the general activity elements of customer service. They apply for small, medium and large businesses and are clearly identifiable activities businesses “do”, so they are easy to refer to, understandable and of practical application to managers and staff. They are things people are responsible for and physically do.

They essentially build on the “service cycle” concept often spoken about in business writings and reflect the importance of end-to-end service across all the activities. That is, getting all aspects right.

Under each of the activities in the service cycle are the “values” that customers believe are important. These form the basis on which customers will judge the quality of your service.

The last activity relates to Managing the service culture, and covers the broad strategies managers need to implement to ensure that the other nine activities occur within a proper organisational structure.

Remember, these service guidelines apply to anyone you are dealing with, not just “paying” customers.



# Will the guidelines help your business?

You can quickly check how your business stacks up by asking yourself 10 simple questions. If the answer is yes, then these guidelines will help you!

| <b>The ten key service activities</b>  | <b>Ask yourself ...</b>  |
|--|--|
| <b>1 Products &amp; services information</b><br>Clearly explaining what you offer.<br>Providing information so customers know about your business and services.  | <i>Have you ever had a misunderstanding with a customer because of some information you gave them?</i>     |
| <b>2 Counter &amp; face-to-face service</b><br>Helping customers meet their needs.<br>Dealing with customers when they come to you for service, either over-the-counter or within your business.           | <i>Does your business ever have inexperienced staff dealing with customers?</i>                            |
| <b>3 Telephone service</b><br>Quick, accurate service.<br>Dealing with customers to address their inquiries when they ring you.  | <i>Has any customer ever said they have trouble contacting you?</i>  |
| <b>4 Taking customers' orders</b><br>Making it easy to buy.<br>Accurately taking and processing the orders customers place with you.   | <i>Are any customers filling out your order forms incorrectly, or asking when the order will be ready?</i> |
| <b>5 Follow-up documentation</b><br>Relevant and timely follow up.<br>Providing any necessary follow-up information that the customer requires.  | <i>Have you ever had a customer call back to ask you where is the follow-up you promised?</i>              |
| <b>6 Billing and managing payments</b><br>Making it clear and easy to pay.<br>The system of charging the customer for the things they have purchased or services received, and taking customers' payments. | <i>Have you ever had a customer query your bill?</i>   |
| <b>7 Visiting the customer</b><br>Arriving on time.<br>Anything that involves you going to the customers' premises.  | <i>Have you ever been late when visiting a customer, and not called to let them know?</i>                  |
| <b>8 Making repairs</b><br>Fixed first time, on time.<br>The various things you do when making repairs on behalf of the customer.  | <i>Have you ever had to take things back to be repaired properly?</i>                                      |
| <b>9 Handling complaints</b><br>Turning complaints to compliments.<br>Addressing any complaints the customer may have with you.  | <i>Are any of your customers more frustrated after complaining than before?</i>                            |
| <b>10 Managing the service culture</b><br>A customer-focused business.<br>Ensuring your business has a service culture focused on the customer.  | <i>Has anyone in your business said "I don't know what the customer wants"?</i>                            |

# 1

## Product and service information

### Clearly explaining what you offer

#### What this covers

The initial “information” you provide about your business is critical to all ongoing aspects of your relationship with customers. In essence, it can make or break whether they will continue to deal with you.

In today’s market, such information can range from the most basic of “one page fliers” as a letter box drop, through to sophisticated Web sites.

It covers all sorts of documented information customers see, such as:

- details about your business
  - description of the range of products and services you offer
  - policy statements (ie service charters, refunds and exchanges policies, complaints policies etc)
  - price lists
  - technical specifications
  - user manuals
  - instruction guides
  - rules and regulations
  - advertising
- and so on ...

The information can be in a variety of forms, including paper, audio, video, and an ever increasing diversity of electronic forms.

Regardless, of its “form”, the information is all about *clearly explaining what you offer*.

### Checklist

#### 1.1 Information about your products and service must be:

- Easy for customers to understand using plain language and diagrams appropriate to the customer. Do not use complex and technical language, abbreviations or jargon the customer won’t understand.
- Readily available to customers, and capable of being easily sent to them.
- Tailored to the specific requirements of customers to ensure it is interesting and useful to them.
- Accurate, clear and concise in conveying details about the scope of the service or product provided.
- Kept up to date, including information about when it was prepared.
- Clear in specifying if it is only relevant to certain situations, such as:
  - nominated time period
  - specific geographic areas
  - certain customers.
- Capable of being easily stored by the customer.
- Specifically provided to customers if it forms part of any contractual agreement.
- Clear in providing contact details for any further enquiries.



## Product and service information – general discussion

Clear, concise information will tell your customers what you want them to know, and what they want to know. No matter what the information is about, clearly establishing it at the outset avoids any problems down the track. Providing clear information that the customer can understand avoids misunderstandings, and in turn, any subsequent conflicts that may arise.

The old phrase, *when all else fails, read the instructions* is not something a business should rely on, as it has fundamentally set the customer on a potential collision course with you. You need to do everything possible so the information guides the customer, and it is not an afterthought.

Much of the information produced by businesses is about products, with the most important things valued by customers being availability, clarity and relevance.

Information becomes especially critical for services, as it is often more difficult to communicate intangible offers clearly. Experience has shown services are easier to misunderstand than products. For services, the information itself becomes the only tangible or real element and therefore is essential to get right.

The importance of this “tangibility” was highlighted in a 1997 survey, which found that the quantity and quality of information communicated by financial fund managers to customers was a key factor in determining the customers’ selection of their preferred fund managers (Money Management, 1997).

### Case study

AAMI was one of the pioneers in the development of customer charters in the private sector. A customer charter is a statement to your customers about what you will do for them and how.

Launched in 1996, the AAMI Customer Charter was described by Professor Allan Fels, Chairman of the Australian Competition & Consumer Commission as a significant development of customer service and protection in Australia.

As Professor Fels said ...

*One of its attractive features is the seamless way it has combined compliance with fair trading laws, state of the art quality customer service features and a competitive tool in the market place.*

The AAMI Customer Charter is a series of promises that allows customers to always expect certain things or deliverables from the company.

As a key piece of service information, the AAMI Customer Charter has been recognised widely through the numerous state and national service awards AAMI has won since its launch.

# 2

## Counter and face-to-face service



Helping the customer meet their needs

### What this covers

This is about what you have to do when dealing with customers in a personal face-to-face situation. It often involves “over the counter” service, but can be any form of direct service to the customer.

The service encounter is broken into a number of stages, including:

- first contact, either initiated by you or the customer – first impressions are crucial. In fact, often one of the first challenges for a customer is knowing how to get to the “counter” or service area before they can even deal with someone
- dealing with the customer
- any required follow-up.

Fundamentally, through all this you are there to *help the customer meet their needs*.

It generally covers any type of service area where the customer comes up to you for their business. It is not just confined to sales counters or checkouts in shops. It can be service counters, inquiries, claims, front office reception areas, booking counters, bank tellers, and the list goes on.

The customer service guidelines do not just relate to staff behind a counter in shops. They also apply to all staff dealing with customers, ranging from hairdressers, restaurants, hotels, and cinemas, through to motor repair workshops. And the same guidelines can be used when you go to meet the customer at their home, business, or wherever they are.

### Checklist

#### 2.1 *Clearly position your service areas*

- Ensure your service areas are easy for customers to find and access.
- Ensure they are of attractive appearance, clean and well maintained.

#### 2.2 *The all-important first contact with the customer*

- Ensure customers can readily identify and find your staff to assist them.
- Always have fully trained, competent staff available to deal with customers in a responsive manner.
- Ensure the sequence customers are dealt with is prompt, and fair through suitable queuing arrangements.
- Acknowledge customers that are waiting, while still giving priority to the customer you are currently dealing with.

#### 2.3 *Dealing with the customer*

- Make sure staff appear tidy and are dressed appropriately for your business to “look the part”.
- Be responsive to customers, flexible in your dealings, and treat them all as individually important.
- Personalise your dealings with the customer by introducing yourself and using their name.
- Always deal in a genuinely friendly and courteous manner.

- Show an attentive interest in the customer, through asking questions and listening to their requirements. Don't be too attentive or pushy though, as customers may get annoyed.
- Always use plain understandable language.
- Apply your knowledge to meet the customers' needs.
- This requires your staff to be fully knowledgeable about your business, products and services and also your organisation.
- Take the time necessary to serve the customer to their satisfaction. Deal promptly and efficiently so not to waste customers' time but don't rush them.
- Demonstrate a good balance between a commitment to the customer and a commitment to your organisation, through flexibility and problem solving.
- Treat customers as you would wish to be treated.
- Always end your dealings with customers by saying good bye.

#### **2.4 Following up on what the customer needs**

- Where follow-up action is required, make sure you clearly summarise to the customer what happens next:
  - what you will do
  - what you require the customer to do – even if it means saying they don't need to do anything.
- Ensure the follow-up occurs within the customers' required time.

### **Counter and face-to-face service – general discussion**

The service you provide to customers either over-the-counter, or through other “face-to-face” dealings is critical, and really reflects the “moments of truth” concept outlined earlier. It is close up, personal, and customers can see directly what is or isn't happening. At this point, the customer is very much a part of a service process that is evolving with you as they speak.

The things customers value highly in this include:

- having service areas and staff that are easy to find
- staff that are friendly and attentive to their needs
- knowledgeable staff, with that knowledge applied in ways to best meet the customers' needs
- being dealt with quickly, but not rushed.

Overall, customers need to feel in control over what is happening, and feel confident about what they are doing.

#### **Case study**

Banks are often an example that immediately people think of when it comes to counter service. The service from **smaller banks** has been repeatedly shown to be better than the “big four”. A Choice survey back in 1994 and again in 1998 concluded that in terms of service and customer satisfaction, the bigger banks were being outdone by many smaller and regional banks. As the surveys showed, the number of people waiting in a queue can give customers a lasting impression about a bank's commitment to service – or more obviously the lack of commitment.

# 3

## Telephone service

### Quick, accurate service

#### What this covers

Customers' use of telephones to contact businesses is growing at an incredible rate. Customers recognise the convenience of the old message "let your fingers do the walking", and with the rapid advancements in telecommunications, businesses actively promote the use of telephone contact.

Whether it be a customer ringing a 1 3 number connecting through to a sophisticated call centre, or ringing the local plumber, the issues are still the same. Again, it is all about you helping the customer meet their needs.

This activity covers any customer ringing your business. And your first fundamental requirement is to ensure that your customers can easily find the right telephone number to call.

Once contact has been made, like for face-to-face service, the telephone service encounter is also broken into a number of stages, including:

- answering the calls – and first impressions are crucial
- dealing with the customer
- any required follow-up.

Whether you are a call centre operator speaking to thousands of customers each week, a sales representative spending most of your time visiting clients, or a tradesperson working on-site, the customer service guidelines equally apply.

#### Checklist

##### 3.1 Advising customers of the number to call

- Ensure your customers can easily find the right telephone number to call.
- Irrespective of the number the customer called, ensure all staff will know how to handle the call to ensure the customer's enquiry can be dealt with effectively.

##### 3.2 Answering the customer's call

- Always have sufficient fully-trained, competent staff available to answer customers' calls.
- Answer all calls quickly, ideally within 10 seconds. Where customers' calls are to be answered with a recorded announcement, ensure the customer can speak to a person ideally within 30 seconds of the call being answered.
- When answering, clearly announce the name of the business and your name so you reassure the customer they have called the right number.
- Ensure the customer quickly speaks to the person who can best deal with them.
- Where calls are to be answered by an answering service or voice mail that requires the customer to leave a message, ensure you return the call to the customer ideally within 4 hours.
- If customers' calls are not answered immediately and they are put on hold, ensure that they are acknowledged during the period that they are waiting and apologise for the delay when they are answered.

### **3.3 Dealing with the customer**

- Treat customers as individually important by being responsive and flexible.
- Personalise your dealings by introducing yourself and allow the customer a chance to introduce themselves if they desire.
- Always deal in a genuinely friendly and courteous manner.
- Show interest, by asking questions and listening to their requirements.
- Always use plain understandable language.
- Apply your knowledge to meet the customers' needs. This requires your staff to be fully knowledgeable about your business, products and services, and also your organisation.
- Take the time necessary to handle the call to the customer's satisfaction (deal efficiently so not to waste customers' time, but don't rush).
- Demonstrate a good balance between a commitment to the customer and your organisation, through flexibility and problem solving.
- Treat customers as you would wish to be treated.
- Always finish your dealings with the customer by saying good-bye.
- Wait for the customer to hang up, before you do.

### **3.4 Following up on what the customer needs**

- Where follow-up action is required, at the end of the call make sure you clearly summarise to the customer what happens next and explain what you will do and what you require the customer to do – even if it means saying they don't need to do anything.

### **3.5 Returning calls to customers**

- All calls required to be returned should be made ideally within 4 hours.

## **Telephone service – general discussion**

The rapid advancements in telecommunications have provided wide scope for customers to contact businesses via the telephone. Mobile phones, answering machines, voice mail, call diverting, 1 3 and 1 800 numbers, and sophisticated call centres now play a key role in the “telephone service” between customers and businesses.

Customers like the greater access this provides but not if it is at the cost of making the service less personal. The use of technology should be to improve access, not to push customers away simply in the interests of economic efficiencies.

The things customers value in dealing with you over the phone are largely similar to any face-to-face service, such as:

- knowing who to contact, and staff that are easy to access
- staff that are friendly and attentive to their needs

- knowledgeable staff, with that knowledge applied in ways to best meet the customers' needs, and
- being dealt with quickly, but not rushed.

Quick convenience and immediate accessibility are two features of telephone contact that often dictate why customers will ring rather than deal with a business face-to-face.

Customers are often looking for short relevant calls, rather than long calls, especially if the length of the call is more to do with the time you are taking on things that don't apply to the customer.

So anything that works against the convenience factor is reducing the benefits customers are seeking. For example, if a customer rings your business, has trouble getting through, is put on hold, first has to deal with a recorded message or automated system, and only then can get through to a person, they quickly become frustrated with the lack of service, and go elsewhere.

### Case studies

The use of the telephone to provide quick and accurate service has been recognised by **Business and Community Services Pty Ltd (trading as *Master your own book keeping*)**. The owner of this small award-winning company's philosophy is to "always be accessible to clients, seven days a week, day or night".

By using new telephone technology and redirecting calls through to a single contact number, the company was able to make this philosophy a reality.

**AGL** handles over 12,000 phone calls a day. They aim to provide consistent quality service with every phone call they receive. In doing so, they have won over 11 awards for service excellence in 2 years. Their successful recipe is:

- Hiring the right type of people
- Training new staff and providing ongoing training that is evaluated
- Regularly assessing operator skills and knowledge
- Having a robust telephone system that allows them to implement change
- Simplifying the front end telephone menu
- Achieving first call resolution in every interaction
- Tracking customer satisfaction and using this feedback as well as incorporating staff suggestions to improve what they do.

The outcome has resulted in increased customer satisfaction and more efficient work practices.



# 4

## Taking customers' orders

### Making it easy to buy

#### What this covers

This covers situations where customers place orders or apply for goods or services that are not immediately available, or are to be used in the future.

It can be in a retail environment, or a diverse range of industries where specialised goods or services have a lead time before they are available. Such a lead time could involve delivery from a warehouse, or a project that takes days, weeks, months or longer to complete, such as building a house.

This “ordering” also covers where the product or service is going to be used at some time in the future, such as booking an airline ticket, or accommodation.

It applies to goods and to services such as insurance, where you effectively “order” the service by taking out a policy. Contracts for activities such as building projects, maintenance (eg. cleaning or car servicing) and finance packages are all considered “orders”.

In many respects “applications” for club memberships are also very similar to “orders”, and the same customer service guidelines generally apply.

The “order” process comprises a number of separate parts, including:

- taking the customer's order
- confirming what has been ordered
- confirming the order's completion.

The many steps of “processing” the order are obviously essential but largely invisible to the customer as they occur within your business, and are not exposed to the

customer. This is why the stage of confirming the order is so important, as it gives the customer the confidence that their order will proceed as expected.

#### Checklist

##### 4.1 Taking the customer's order

- Ensure customers know who to deal with for orders.
- Clearly explain to the customer what they are required to do to place an order.
- Provide a range of options for customers to place orders with you, such as counters, telephone, in writing, electronic and direct online.
- If a quote is required by the customer, you must ensure that the full quote is received by the customer in the time agreed with the customer.
- Ensure it is quick and easy for the customer to provide all the necessary details for the order.
- Don't request unnecessary or irrelevant information from the customer, or information you already have in your records.
- When using your records, regularly confirm with the customer that your records are up-to-date and ensure all information on the customer remains confidential and protects the customer's privacy.
- Make sure you take all the details of the order correctly.
- Ensure the “date of order” is the date the customer placed the order, and not the date the order was processed.



## 4.2 Confirming what's ordered

- Provide written confirmation of the order to the customer either immediately at the time of order, or ideally within 2 days of receiving the order.
- The Order Confirmation should include:
  - your reference number
  - reference to any customer order/purchase/job number
  - the name of the customer who placed the order
  - a description of what has been ordered (Plain language, with specifications where required)
  - full details of all the costs
  - information about delivery or installation (dates and any customer requirements)
  - a contact number for easy reference if the customer has any queries regarding the order
  - any legal requirements regarding contracts.
- Ensure the order is fully processed and completed promptly.
- If there are any changes to the initial order by either you or the customer, ensure you confirm and document these changes with the customer.
- If the goods ordered are not to be delivered for over 2 weeks, then keep the customer informed during the pre-delivery period that the goods will still be available at the agreed date.
- Where there are any delays with the delivery of the goods or services, then immediately advise the customer of the new delivery date.

## 4.3 Order completed

- Confirm with the customer that the order has been fully completed.

## Taking customers' orders – general discussion

Taking customers' orders is a critical activity for any business. If you think about it, a customer wants something from you, so it is in your best interest to make it as easy as possible for them to order. The reverse is also true, if you make it too hard to order from you, customers will simply go somewhere else to avoid the hassle.

Things customers are looking for in any ordering process include:

- knowing how and where to order
- being easy to order
- having confidence that the order will be completed, as quickly as possible
- being kept informed of progress
- being told when it has been completed.

Sometimes things can be unavoidably delayed, and customers, while not happy, generally accept this – provided you advise them as soon as possible so they can plan accordingly.

Studies have shown that order and application forms that are easy to complete are important to customers and influential in who they choose to do business with. (Kavanagh 1994).

### Case study

The importance of completing orders in the customers' time requirements is recognised by furniture manufacturing company – **Melwood Trading**.

As one of the owners said "a lot of manufacturers take the view that if it takes six weeks, then it takes six weeks and you don't really have a choice in it. Our view is that if the customer wants it tomorrow then, if we can do it, we'll do it. And therefore we have won a lot friends and influenced a lot of people by doing that".

Melwood Trading were offering flexibility to their customers. They looked at manufacturing on a customer-by-customer basis when placing an order rather than rigidly following set procedures.

# 5

## Follow-up documentation

### Relevant and timely follow-up

#### What this covers

There can be many situations where you need to provide some form of follow-up information to the customer.

This can be initiated as a request from the customer, or it can be something initiated by you where you need to send something to the customer such as confirming arrangements, providing quotes, sending information, providing a progress report, or requesting clarification.

Many of the same customer service guidelines for “Product & service information” also apply here.

The key phases in this activity include:

- confirming exactly what is required before sending
- sending the information
- any related follow-up required.

In essence, any further information that is sent to the customer must be *relevant and timely*.

#### Checklist

##### 5.1 Before sending

- Confirm with the customer ...
  - what they need
  - who it should be sent to
  - where to send it
  - when they need the information by
  - when the information will be available

##### 5.2 Sending

- Provide a personalised covering note acknowledging the customer’s request.
- Ensure the information is sent to the right person, and arrives within the time expected by the customer.
- Only include other information that you know will be of specific relevance and interest to the customer.
- Provide a contact number and easy reference if the customer has any queries regarding the further information.

##### 5.3 After sending

- Ideally within 1 week, check with the customer that the information was received, and help with any further queries.

### Follow-up documentation – general discussion

In many situations, you will be providing follow-up documentation to your customers.

The critical aspects affecting follow-up documentation include:

- ensuring that you know exactly what is required by customers
- sending out the information quickly in the time requested by the customer
- following up to see if it has met the customers’ needs.

Customers value things being personalised, rather than just the standard “form letter”, and rely on you to make sure all the necessary information is included that is relevant to them.

Speed of response is important, as often the requested information will be of importance to the customer.

The same factors also apply as for general product and service information, namely clarity and relevance.

### ***Case studies***

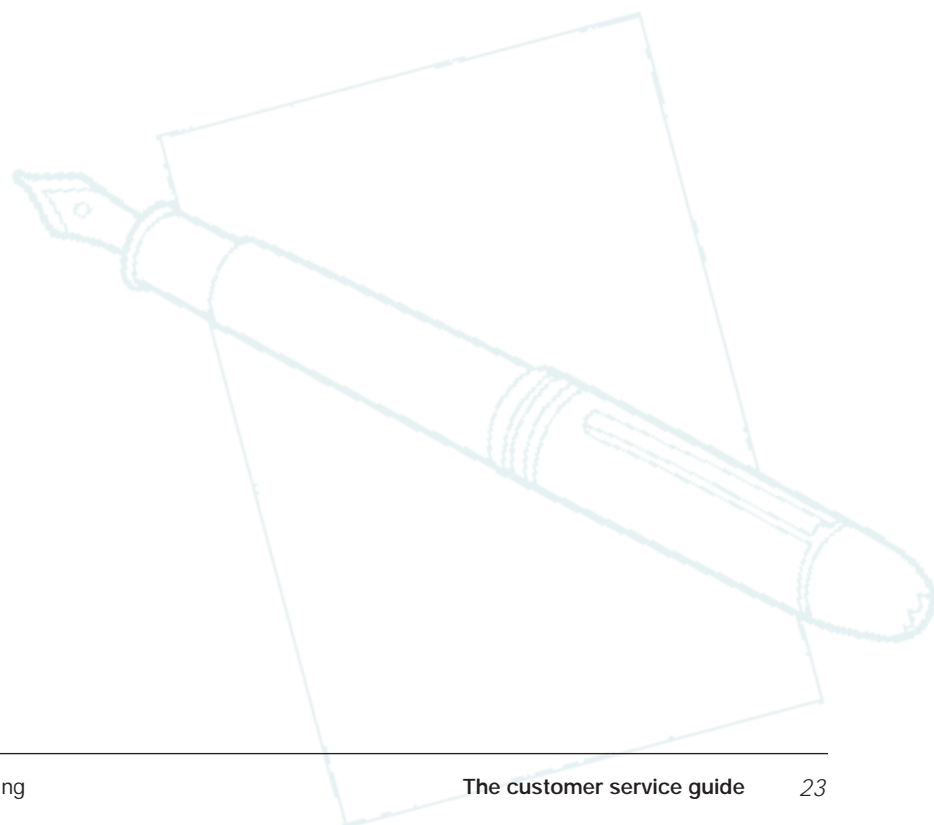
A survey of 6000 law firm customers has shown that keeping in closer touch with their customers has won smaller law firms a bigger slice of the work away from their larger competitors (The Age 12 August, 1998). As stated, "any firm which has increased its size and client base has done something radical to demonstrate that they are in touch with what their clients are wanting. They're staying in closer touch with their clients about the progress of a matter, they're keeping them better informed".

The survey demonstrated the value customers place on being informed during all stages of their dealings with a firm. In this situation, many customers felt powerless when faced with legal problems and had to put a lot of trust in the law firm to properly act on their behalf. The smaller firms acknowledged their customers'

personal concerns by providing timely follow-up information and a more personalised service.

**The Art of Hair** recognises the importance of following-up with their clients. Staff regularly contact their clients within a week to gauge if they were satisfied with the service that was provided. This means that staff can immediately address any problems and clients are then invited back to reassess and resolve the issues.

New clients are also actively surveyed each week and encouraged to respond as staff provide incentives such as a discount on their next visit. These follow-up actions enable the salon to address any negative responses as well as keep their records up to date.



# 6

## Billing and managing payments

### Making it clear and easy to pay

#### What this covers

In essence, “bills” are what you provide customers with as a way of telling them how much they need to pay you. “Bills” can be in the form of:

- statements, invoices or bills
- accounts and renewal notices
- or in its most basic form, simply telling the customer how much they owe you!

In general they are sent in paper format, but increasingly they are being sent electronically.

Bills can relate to the “one-off” cost of a product or service, its ongoing use or, often confusingly, both. A bill can be for something already provided, or something that will be provided in the future.

There can be regular bills, or ad hoc “one-offs”. They can be for the full amount, or only part of the total, such as a deposit, or progress payment. There can be one bill covering many things, or at the other end, there can be many bills for the one thing.

The key aspects in the billing activity include:

- providing the bill to the customer
- the format and content of the bill
- any inquiries, adjustments or corrections associated with the bill.

The fundamental purpose of a bill is to make it extremely clear to the customer how much needs to be paid – in such a way that the customer can understand what in fact they are paying for. This then needs to be followed through to make it easy for customers to pay you.

### Checklist

#### 6.1 Providing the bill to the customer

- For regular bills, the frequency you send bills should be in line with what best suits the customer.
- Your bill must arrive within the time expected by the customer.
- Your bill must be sent to the correct location and the correct person.

#### 6.2 Billing format and content

- The bill must be clear and easy to understand, with no technical jargon, codes or abbreviations.
- Your bill must contain any relevant customer reference number they have provided to you or you have provided to them (ie quote number, order number, account number, job number etc) to allow matching of charges and allocation of costs.
- Your bill must be accurate and complete.
- Your bill must clearly specify what it contains, including:
  - the time period covered
  - a clear description of the work done, the goods/services provided, usage levels etc, with a summary of the total amount
  - information about any outstanding payments
  - any legal requirements.

- Your bill must clearly specify when payment is due, and how payment can be made. You must give sufficient time for the customer to check the bill, approve it, and arrange payment
- If the bill contains an agreed discount, the basis of the discount and how it is determined should be clearly outlined in the bill.

### **6.3 Billing inquiries, adjustments and corrections**

- Your bill should contain a contact telephone number for any inquiries.
- Any queries about the bill or payment must be handled fairly and quickly.
- If adjustments or corrections are required, then prior to sending the amended bill, you should contact the customer and tell them what corrections or adjustments have been made.
- Any agreed adjustments or corrections must be clearly outlined in the amended bill.
- For complex bills, a plain language guide should be made available to customers to help them understand the bill.

### **6.4 Bill payment**

- Provide a range of convenient options for customers to pay your bills.

## **Billing and managing payments – general discussion**

Of all the things that can annoy customers, it is billing that in many respects is one of the most ridiculous. When you think about it, customers know and accept that they will have to pay. So when the bill is wrong, unclear, or arrives too early or late, or can only be paid in a certain way, then it annoys customers that they have to “hassle” over actually paying. It simply makes it hard to pay.

The keys to successful billing all revolve around the simple concepts of “no surprises” and “ease”. The things customers place considerable importance on for billing and payments include:

- being clear, and easy to understand
- being accurate, and including all the related costs involved
- arriving at the right time and location
- being an amount that they generally expected
- having a variety of convenient payment methods.

Investigations have shown that inaccurate billing is one of three service failures that influence customers to switch to other companies, and is adversely affecting customer satisfaction.

### **Case study**

The importance of accurate billing was recognised by **Dulux Paints**, both from an internal and external perspective. Back in 1993, Dulux Paints decided to focus heavily on reducing the error factor in their invoices, and was able to bring the error rate down from 2.5% to 0.3% on over 24,000 invoices per month. In addition to the obvious reduction in the internal costs of re-work, customers no longer spent time arguing with the firm over inaccurate bills. This meant Dulux bills were paid on time with greater customer trust and satisfaction (Lembach, 1993).

A survey of 6000 law firm customers has also shown that customers are placing increasing demands on more detailed bills, greater accountability and better communication (The Age 12 August, 1998), and the successful legal companies are responding to these needs.

# 7

## Visiting the customer

### Arriving on time

#### What this covers

This activity involves you going out to a customer's business premises, site or house.

In addition to being an important activity in its own right, it is often one of the few times that a customer actually gets to meet you, or a representative from your business, and is able to put a "face" to the organisation.

Visits can be for a variety of purposes, including:

- sales visits, preparing quotes etc
- inspections and assessments
- delivery and installation
- repairs and maintenance.

Visits can be on a regular basis, such as maintenance service check-ups, or on an ad hoc basis such as repairs or deliveries. Some visits can be planned and anticipated well in advance, while others are the result of an unexpected event, and require urgent attention.

Some visits occur at the customer's premise simply as a matter of convenience, whereas for others it involves what is at the site itself.

The duration of the visit can also vary enormously in terms of how long you are actually out at the customer's home or business. This can range from literally only minutes, through to weeks on end.

There are three main stages associated with any visit, including:

- making arrangements for the visit
- when out at the customer's premise
- any follow-up after the visit.

### Checklist

#### 7.1 Making arrangements before the visit

- Arrange an appointment time to visit that best suits the customer.
- Be specific about the appointment time, rather than giving a range of time.
- Provide the customer with the name and contact details of the person visiting the customer.
- Provide the customer with a contact number for reference if they have any queries regarding the visit.
- Where the visit has been planned well in advance (ie. more than a week), confirm the visit with the customer ideally around 2 days before the visit.
- Advise the customer of what they need to do in preparation for the visit (where it involves special arrangements).
- Arrive at the time expected.
- If the visit is delayed by you or your organisation, immediately contact the customer to advise of the delay. If arriving late is not suitable for the customer, arrange for the visit to be changed to a time that best suits the customer. Apologise for any inconvenience you may have caused the customer.



## 7.2 During the visit

- On arrival, show proof of the organisation that you are from, to the customer.
- Meet the specific customer that made the arrangements, and discuss what you understand is involved before you commence.
- Conduct the visit with a minimum of disruption to the customer.
- Keep the customer informed of progress during the visit, especially if you have to leave the premises at any time during the visit.
- Leave the premises in the condition you found them.
- Before you leave, confirm and explain to the customer what was done.
- Leave the customer with a record of the visit, and contact details for any further queries.
- Farewell the customer as you leave.

## 7.3 After the visit

- Ideally within 2 days, follow-up to check everything is as the customer expected.

## Visiting the customer – general discussion

The nature of the relationship with your customers changes when you are on their “home ground”, and a number of new issues start to emerge.

A critical requirement is for appointments to be arranged at a time best suited for the customer. Too often, businesses make arrangements that only suit themselves, and pay little regard to whether it is convenient for the customer.

Being able to rely on the service provider to actually turn up on time is also critical to customers. This element of reliability is important as customers prefer to have arrangements made that are realistically achievable, rather than “promises” that aren’t met.

By arriving at the appointed time you also project a professional image that carries through to the work you do during the visit. If for whatever reason there is a delay, then it is imperative that you contact the customer as soon as possible to allow them to plan accordingly.

Knowing what is happening extends through the whole visit experience which includes making customers aware of what you will be doing, and any special arrangements or preparations the customer will be required to make.

Often the visit is associated with an event that is particularly stressful for the customer such as in the case of repairs, and great sensitivity and responsiveness is called for. You also must remember that many laws exist that govern how business should occur in the home, and you should familiarise yourself with the door-to-door sales laws.

Customers place strong emphasis on their security when someone visits their business or home, and they need to be confident that the visit doesn’t place their security at risk and that no liberties will be taken.

### Case study

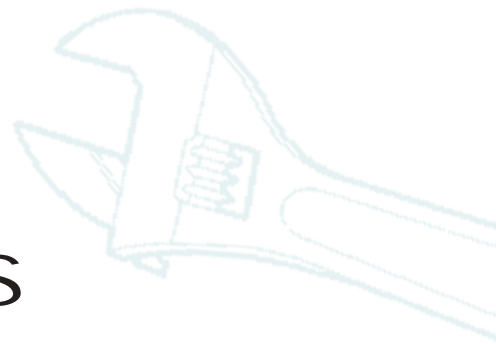
The importance of arriving on time is recognised by **Dentoway**, National Small Business Award winner. Dentoway emphasises the need for a strong professional image. As the Director says:

“We try to provide an outstanding service. If we go to people’s houses, for example, we arrive on time. This is more important than it sounds, especially in the trades area”.



# 8

## Making repairs



### Fixed first time, on time

#### What this covers

This activity covers the broad spectrum of situations involving repairs. It applies to a wide range of industries, and many situations, including:

- Where you go to the customers' place to make the repair. This can either be where the customer is based (home or business), or where the customer happens to be situated at the time when the problem occurs, such as out on the road.
- When you go to collect the product, and take it away for repair.
- When the customer brings the product to you to be repaired.
- Repairs that are done as a "remote fix" – that is, where the repair actually occurs at another location, not at the customers' place, but is affecting the customer. For example, repairs to "networks", such as computer systems, telecommunications, water, electricity, gas etc.
- Where you are the central contact point for the customer, but the repair itself is done elsewhere. As the contact, from the customer's perspective, you are still responsible for the repair, as they only deal with you.
- You could be repairing your own product, or someone else's.

Just as there are many situations, so too does the urgency and sensitivity of the repair vary. Repairs can range from extremely urgent (such as a threat to a customer's health and safety, or where it can cause critical adverse economic affects, such as loss of production and revenue) through to non-critical cases where there is no real need for urgent repairs.

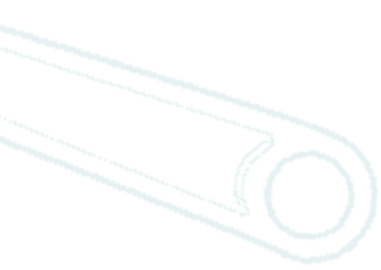
The key phases in any repair activity include:

- taking the customer's report of the problem
- fixing the problem
- follow-up after the repair.

#### Checklist

##### 8.1 Reporting the problem

- Clearly advise your customers where they can report any problems.
- Irrespective of who the customer contacts in your business, ensure all staff know how best to handle the problem report to ensure the customers' enquiry can be dealt with effectively.
- Ensure your customers can report any problems to you 24 hours a day.
- Make it easy for customers to describe the problem.
- Advise the customer of what you will do next, and the process involved in making the repairs.
- Provide the customer with a contact number to call for easy reference if they have any queries during the repair process.



## 8.2 Fixing the problem

- Clearly demonstrate to the customer that you understand the problem.
- Advise the customer what they should do next, if anything at all.
- Advise the customer that you will take responsibility for investigating and fixing the problem.
- Show concern for the customers' situation, and demonstrate a sense of urgency.
- Advise the customer:
  - The shortest time it will take to fix the problem, and check that this is acceptable to the customer.
  - How much it will cost to fix the problem. This would include clearly specifying if there is no cost, such as under a service guarantee.
- Gain the customers' approval before you commence fixing the problem, to ensure there are no misunderstandings.
- Keep the customer informed of progress during the investigation and repair process.
- Fix the problem quickly and fully – first time and on time.
- Advise the customer as soon as the problem has been fixed.
- Confirm and explain to the customer in plain language the cause of the problem, and the work that was done.
- Leave the customer with a record of the repair work that was done.
- Provide a guarantee for all work done.
- Where appropriate:
  - explain what you have done to prevent the problem occurring again

- suggest to the customer what they could do to prevent the problem occurring again.

## 8.3 Follow-up

- Ideally within 2 days, follow-up with the customer to check everything is working as the customer expected.

## Making repairs – general discussion

Making repairs for customers can be a highly sensitive and emotionally charged matter.

The things customers value in any repair situation include:

- having confidence that you know what you are doing
- the speed of the repair, and the expectation that repair times need to be continually reduced. An estimate of the repair time and costs involved are essential requirements
- not being blamed for the problem, and for your business to take on responsibility to fix it
- showing concern for their situation
- having a clear contact point, and being kept informed of progress
- being advised what they can do to help avoid the problem recurring.

One aspect that makes customers feel very vulnerable in the whole repair process is their lack of expertise. This level of dependency makes them uncomfortable, and you should involve the customer as much as possible so they know what is happening. It gives them confidence that you are doing the right things right.

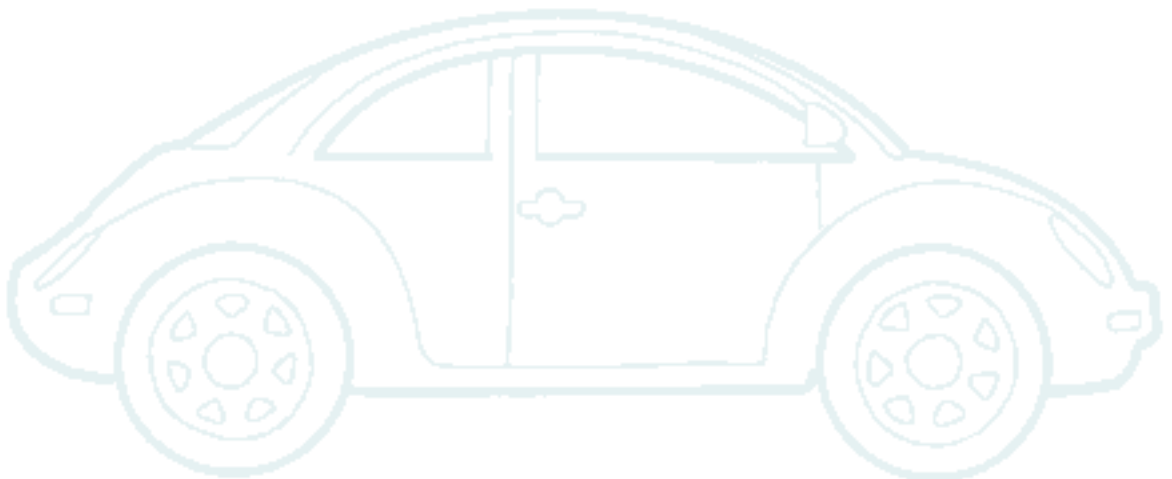
### **Case study**

Providing repairs in a time frame to fully meet customer's needs is a key feature of the award-winning **Callaghan Motors**. When a new vehicle they recently sold broke down, they arranged the urgent replacement of parts to meet the customer's critical departure deadline. The customer was impressed that the business took their departure deadline seriously and gave information to reassure them that the deadline would be met.

A key requirement of customers needing to feel in control in a repair process was highlighted by social researcher, Hugh Mackay (1993). In contrast to the above case study,

Mackay gave an example of a bad motor vehicle repair service.

The customer had given to the dealership's service department a list of seven things that needed to be fixed. When the customer picked up the car, they were reassured that everything had been done. However, as the customer drove away it became obvious that at least two things hadn't been fixed, and there were now one or two other things that didn't seem to be wrong when they put the car in for service that morning. The customer felt absolutely out of control of the situation and their service demands went up accordingly.



# 9

## Handling complaints

### Turning complaints to compliments

#### What this covers

This activity covers the forms of “complaints” that you receive from customers.

It is not necessary to tightly define exactly what a complaint is, but for working purposes, it starts with any problem the customer raises with you, through to the more formal lodgement of complaints.

If you satisfactorily deal with the problem early, then generally it prevents it escalating into a formal complaint.

It is all about how to best handle the customer, not just focussing on the specific problem or complaint, and involves three key stages, namely:

- taking details of the customer’s problem
- dealing with the customer and the problem
- following up after the problem

All this needs to be handled within the relevant government regulations to ensure customers’ rights are protected at all times.

The management of complaints should include a system of recording the complaints, as this provides a valuable source of information on things causing problems for customers. This in turn allows you to take the necessary action to ensure the source of the problems are identified and prevented from recurring.

Research has shown that in some cases you can regain, maintain or increase customer satisfaction by handling complaints extremely well. However, emphasis should still be placed on getting things right the first time. It is certainly less costly, disruptive and risky as a customer retention strategy.

### Checklist

#### 9.1 Taking details of the customer’s problem

- Make it easy for your customers to raise any problems they have with you.
- Thank the customer for raising their problems with you.
- At all times treat the customer with genuine empathy, courtesy, patience, honesty and fairness.
- Respond to the problem quickly, tell the customer how it will be handled and advise the customer when they can expect a response.
- Speak to the customer in person, and do not rely solely on any written complaints, or records of conversations.
- Demonstrate to the customer that you clearly understand the full nature of their problem, by:
  - listening – do not jump to conclusions, apportion blame or become defensive
  - asking questions to clarify the situation. Familiarise yourself with any background information before you speak to the customer. This could include checking internal records, speaking to staff involved and checking how this compares with the customer’s version of events
  - summarising back to the customer your understanding of the problem.
- Once details of the problem have been taken, advise the customer what will happen next.
- Provide one person to manage the problem to its outcome

- Ensure that all your staff dealing with complaints have the full authority to organise solutions acceptable to the customer.

### **9.2 Dealing with the customer and the problem**

- Advise the customer that you are taking full responsibility for dealing with the problem.
- Adopt a solution-focused approach by actively involving the customer in this process.
- Ensure the customer is happy with the proposed solution before proceeding.
- Keep the customer informed of progress during the process.
- Ensure all promised action is fully completed promptly.
- Clearly advise the customer of the outcome of their problem.
- Advise the customer of any action that will be taken to prevent the problem arising again.
- Always work within the relevant government regulations, and ensure customers' rights are protected.

### **9.3 Following up after the problem**

- Ideally within 1 week, follow up with the customer to check that everything has been satisfactorily resolved.
- Keep a record of all problems and complaints raised, and analyse the information gathered.

## **Handling complaints – general discussion**

No one seriously questions that it is much better getting the service right in the first place. However, things can still go wrong. The unexpected happens, and having a good system for managing any complaints is critical. Good complaint management can have a positive impact on customers.

Customers are essentially looking for their problem to be:

- easy to report
- acknowledged
- dealt with quickly, sensitively and fairly.

Poor examples of complaint handling include:

- not having any way for customers to make their complaints to you, or not having a system to record complaints
- not taking responsibility for the problem, and repeatedly giving them the run-around by making them deal with other staff
- blaming the customer for the problem in the first place, or saying no-one else has complained
- having staff with no authority to make decisions to help the customer
- taking too long to respond
- offering no solution, or one the customer doesn't believe is reasonable.

The more times the customer has to contact you about the complaint, and the more times it needs to be “escalated” to someone higher up the business, then the more dissatisfied the customer becomes.

The potential for complaint management to go wrong tends to increase with the size of the business, given that more management layers are likely to be involved. This doesn't need to be the case, if the first person the customer deals with has the authority to act.

### **Case study**

The importance of following up complaints has long been recognised by company **The Art of Hair**. The owner of the salon personally follows up any complaints they receive. As she says, “a client who is unhappy with a haircut is likely to tell far more people than a person who is satisfied. It's amazing ... if you follow up a complaint, that client generally ends up being one of your best long-term clients”.

# 10 Managing the service culture

## A customer-focused business

### What this covers

The preceding 9 activities have all been critical customer-facing areas where customer service is essential.

The 10th activity – Managing the service culture – is all about ensuring that your business has the right service culture that allows the customer service guidelines to be successfully implemented and maintained.

Providing the necessary management leadership is crucial in developing a customer service culture, irrespective of whether the business has 2, 200 or 20,000 staff.

### Checklist

#### 10.1 Key management areas include:

- Creating a customer service environment across your whole business that is specifically aligned with your customers' needs and focuses on customer retention.
- Having and actively following a customer service charter which clearly sets out the quality of service your customers can expect from you.
- Ensuring that your business' policies, practices, systems, rules, facilities and staff actively provide for excellent customer service delivery.
- Integrating your customer service strategy into your overall business approach and plans.

- Creating a structure and culture that enables high levels of staff satisfaction, and rewards staff for their ability to deliver excellent customer service.
- Ensuring you have mechanisms in place to obtain regular, reliable feedback from your customers about their needs and your service.
- Actively encourage quality service and continuous improvement in everything your business does. This requires ongoing examination of the underlying causes which create or tolerate service problems, and changes in practices which created the problems.
- Ensuring your business always complies with the fair trading laws as a natural complement to best practice customer service.

### Managing the service culture – general discussion

To put it most simply – staff don't create the service provided by a company, they deliver it.

In fact, about 80% of the service delivered from a business stems directly from the company's processes, systems and policies. Put another way, the staff have very little capacity to influence the overall service quality, as much of what they can and can't do is effectively dictated by management.

Good service can only occur where the management culture brings together a service environment that integrates the staff with processes, systems and policies that are focused on servicing the customer.

Much has been written and spoken about service attitude and behaviour. In practice, good customer service comes from what the business is doing. The best management and staff “service attitude” in the world means nothing if it is not put into practice with what it actually does. It is what they do – their behaviour – that matters. Having a customer-focussed attitude is important, but it is only converted to service when

someone actually does something for customers.

Therefore, responsibility for managing the service culture clearly lies with management. It is management’s role to ensure that what their business and staff actively do is focussed on providing excellent customer service.

### ***Case study***

Its one thing to have a customer service plan or charter but another to actually have staff trained and knowledgeable in customer service. Stadium Telstra has every member of its staff undergo general and job specific training designed to enable staff to overcome the challenges that a large venue presents.

Customer Service Staff undertake nine hours of customer service training and participate in a variety

of courses to ensure that all interaction with Stadium patrons is of the highest quality. To maintain excellent customer service an annual induction for all staff is conducted. The result of this training is a team of dedicated professionals uncompromising in their service delivery and attention.

Are your staff up to speed with your business expectations of customer service?



# M

## aking a difference

To finish, let's look at how the customer service guidelines could make a difference to a business.

### No-care Pty Ltd – A sorry tale of poor customer service

No-care is well known in the industry for its workmanship but the staff quietly admitted that they felt uncomfortable when it came to talking to customers, who always seemed to ask lots of questions.

No-care couldn't really understand why customers asked all these questions, including such things as what they did, which areas they covered and their trading terms. They felt sure it was all explained in their brochure, although they couldn't remember having updated since they started in 1994.

Working on the basis of "we'll start it as soon as we can", customers still always wanted to know an actual finish date. Customers often tried calling No-care about progress but they could never speak to anyone who knew what was going on. No-one from No-care ever returned calls, they were too busy, and the information the customer asked for to confirm arrangements never arrived.

After the first on-site appointment was missed because No-care didn't turn up, the customer had to take another day off work to be there again, as No-care couldn't say exactly what time they could get there to start.

The job was eventually completed – three weeks longer than the customer expected. And two days before the job was even finished, the final bill arrived. The bill was more than quoted but didn't outline what the extra costs were for.

To make matters worse, things started to go wrong after the job was completed and further work was required. An argument erupted, with No-care blaming the customer for causing the problem and claiming that no-one had ever questioned their workmanship before. The customer wrote a formal complaint letter but No-care simply didn't respond.

In the end the customer gave up but decided not to pay the extra amount outstanding. The customer often recounted their No-care horror story to many friends. Six months later the customer needed similar work done and decided to use their competitor, All-care, because a relative had said how happy they were with them.

Despite a promising start in 1994, No-care's business had been struggling over the past few years and they hadn't been doing the same amount of repeat work for past customers any more. The owners felt sure that they needed to do some more advertising, although they recognised that it was pretty costly and time consuming, and they didn't really pick up much new work last time they advertised ...

## All-care Pty Ltd – A successful case of applying the guidelines

When the customer rang All-care, they were pleasantly surprised at how helpful the manager was. The manager certainly seemed to understand what the customer was looking for, and it gave them the confidence that this was a company that *knew their stuff*.

They arranged to meet next week at 5.45pm, as this best suited the customer, who was able to fit it in between work and their evening commitments. All-care rang the day before to check that the appointment time still suited and the meeting went well.

After listening to what the customer required, and when they needed it finished, All-care gave an initial outline of what was involved and answered the customer's questions. A letter and attached quote arrived two days later confirming everything.

Unfortunately the start of the project was initially delayed because of problems with the availability of parts. However, All-care let the customer know immediately, and this allowed the start of the work to be rearranged. In the end, All-care was able to catch up and still finished on time. All through the project, All-care regularly let the customer know how things were progressing.

A few days after the job was finished the manager rang to check that the customer was satisfied with the work and also took the opportunity to ask a few questions about how the customer had thought the company had performed and where it could improve.

The bill was sent out, and it separately specified the additional work that the customer had requested during the project, and itemised all costs involved.

The customer was very impressed with All-care and not only thanked their relative for suggesting such a good company to use but also referred All-care to a friend who needed similar work.

Although a relatively new company, All-care's business was certainly expanding and profits were strong. All-care knew they weren't the cheapest company in this highly competitive market but customers seemed to be very happy. Over 90% of all their work was coming from either past customers, or people who said that All-care had been recommended to them.

With their business growing, All-care felt confident putting on extra staff. The managers made sure that their new staff clearly understood the strong customer focus All-care believed in, and provided training to ensure their high service standards would be maintained.

## What made No-care so bad

- insensitive to the customer's need for information
- no appreciation of the customer's timing requirements
- failed to deliver on any follow-up
- blamed the customer for problems.

## What made All-care so good

- applied their knowledge to the customer's situation
- aware of the customer's needs
- kept the customer fully informed
- met the customer's deadlines and kept promises.



# urther Information

## ***Australian Competition and Consumer Commission (ACCC)***

The ACCC is the national trade practices and consumer protection law enforcement agency.

Tel: 1300 302 502

[www.accc.gov.au](http://www.accc.gov.au)

## ***Business Entry Point (BEP)***

BEP provides online government services and information for Australian business. This includes information on start-up, assistance, taxation, licenses, legislation, as well as significant transactions such as taxation compliance and license applications.

[www.business.gov.au](http://www.business.gov.au)

## ***Business Licensing Information Service (BLIS)***

BLIS helps businesses cut through the licensing red tape to find out what government licences are needed in different industries.

Free Call 1800 463 976 or

Sydney 9619 8722

[www.fairtrading.nsw.gov.au](http://www.fairtrading.nsw.gov.au)

## ***Customer Service Institute of Australia (CSIA)***

CISA serves the needs of all Australians who work in customer service. Its mission is to develop people, systems and standards to enhance customer service.

Tel: 9328 5025

[www.csia.com.au](http://www.csia.com.au)

## ***Small Business Advisory Service Centres***

Small Business Advisory Service Centres also known as Business Enterprise Centres, provide free, confidential advice and assistance to existing and potential small business owners and operators.

Tel: 1300 134 359 for your nearest Centre

[www.smallbiz.nsw.gov.au](http://www.smallbiz.nsw.gov.au)

## ***Society of Consumer Affairs Professionals (SOCAP)***

SOCAP is a professional association for people working in the area of consumer affairs and customer relations.

Tel: (03) 9650 6005

[www.socap.org.au](http://www.socap.org.au)

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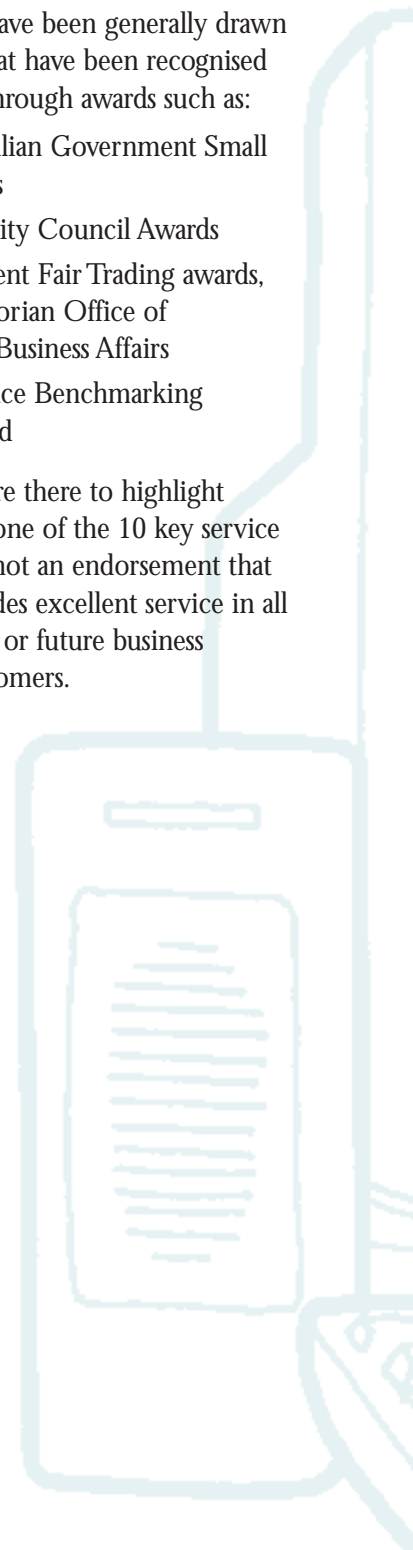
## A note on the case studies

To help demonstrate good service in the Key Service Activities, a number of case studies have been provided in this Guide.

The case studies have been generally drawn from businesses that have been recognised for their service, through awards such as:

- Telstra & Australian Government Small Business Awards
- Australian Quality Council Awards
- State Government Fair Trading awards, such as the Victorian Office of Fair Trading & Business Affairs
- Customer Service Benchmarking Australia Pty Ltd

The case studies are there to highlight service related to one of the 10 key service activities, and are not an endorsement that the business provides excellent service in all facets of their past or future business dealings with customers.





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# phone 13 32 20

For help on any fair trading issue call your nearest Fair Trading Centre, or call the specialist service listed below which is relevant to your enquiry. A range of Fair Trading services are also available via Government Access Centres (GACs) and other agency locations throughout regional New South Wales. For details, visit the Web site [www.fairtrading.nsw.gov.au](http://www.fairtrading.nsw.gov.au)

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| Tenancy Enquiries .....                            | 9377 9100.....      | 1800 451 301 | <i>(outside Sydney)</i> |
| .....  | 9377 9099 (*TTY)    |              |                         |
| Strata Schemes.....                                | 9338 7900.....      | 1800 451 431 | <i>(outside Sydney)</i> |
| Aboriginal tenancy .....                           | 9377 9200.....      | 1800 500 330 | <i>(outside Sydney)</i> |
| REVS .....   | 9633 6333.....      | 1800 424 988 | <i>(outside Sydney)</i> |
| .....  | 1300 369 889 (*TTY) |              |                         |
| Business Licences .....                            | 9619 8722.....      | 1800 463 976 | <i>(outside Sydney)</i> |
| Registry of Co-operatives and Associations .....   |                     |              |                         |
| .....  | 6333 1400 .....     | 1800 502 042 | <i>(outside Sydney)</i> |
| Consumer, Trader and Tenancy Tribunal (CTTT) ..... |                     | 1300 135 399 |                         |

TTY .....9338 4943

\* Telephone service for the hearing impaired.

### Language assistance

Ring the telephone interpreting service on 13 14 50 and ask for an interpreter in your language. The interpreter can then contact the Office of Fair Trading.

Office of Fair Trading  
 1 Fitzwilliam Street Parramatta NSW 2150  
 PO Box 972 Parramatta NSW 2124  
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