Personal Assistance 4
Module 4: Liaise with a range of customers of a business
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After completing this module, you will be able to:

– Initiate contact with a range of customers
– Maintain contact with a range of customers
– Administer contact with a range of customers
1. Initiate contact with a range of customers

• When you have completed this subject outcome, you will be able to:
  – Identify, assess and maintain or enhance current status of satisfaction
  – Inform customers of the business activities
  – Report back on the situation
What is customer satisfaction?

• Because customer satisfaction is subjective (i.e. seen differently by each individual), measuring it won't be exact and will require sampling and complex analysis.

• Customer satisfaction measurement must be undertaken with an understanding that there is always a gap between customer expectations and what a product can offer.

• There should be some connection between customer satisfaction measurement and bottom-line results (i.e. company profits).
Characteristics of customer surveys

- Marketing and sales employees are mostly responsible for designing customer satisfaction surveying programmes, questionnaires and focus groups.
- Customer input itself is needed to design a successful survey.
- Top management and marketing divisions champion the programmes.
- The survey must include not only a business’s own customer satisfaction ratings but also how customers rate the business’s competitors.
- Satisfaction results are made available to all employees.
- Customers are informed about changes brought about as the direct result of listening to their needs.
- Customer satisfaction is incorporated into the strategic focus of the company via the mission statement.
- Stakeholder compensation is tied directly to the customer satisfaction surveying programme.
- A concentrated effort is made to relate the customer satisfaction measurement results to internal processes that affect customers.
- The system must be relatively easy to design and understand.
- It must be credible enough that employee performance and compensation can be attached to the final results.
Objectives of a customer satisfaction survey

• Understanding the expectations and requirements of customers.
• Determining how well your company and its competitors are satisfying these expectations and requirements.
• Developing service and/or product standards based on your findings.
• Examining trends over time in order to take action on a timely basis.
• Establishing priorities and standards to judge how well you've met these goals.
Designing a customer satisfaction survey

• How will the information we gather be used?
• How will this information allow us to take action inside the organisation?
• How should we use this information to keep our customers and find new ones?
Activity 1

• Imagine you have a small business that makes photocopies and binds documents. You see other similar businesses seem to be doing better than you are.

• Design a questionnaire that will help you to determine what the factors are that would cause your potential customer to bring his or her business to you.

• In doing so, state for each question that you design how you will use the answers to your benefit.
Ways of doing surveys

Direct questioning

“Take away” questionnaire
1.2 Inform customers of business activities

Proactive information
- Advertisements
- Personal visits
- Company events
- Promotional displays
- Blogs
- Newsletters

Reactive information
Activity 2

• Write an article for placing in your local newspaper in which you describe the latest activities at your educational institution, with the intention of keeping previous learners informed, as well as enticing possible new learners to enrol.
1.3 Report back on the situation

• Reporting back to participants
  – Media advertisements
  – Personal visits
  – Company events
  – Promotional displays
  – Newsletters

• Reporting back to the business
  – Formal reports
  – Presentations
  – Company newsletters
2. Maintain contact with a range of customers

- When you have completed this subject outcome, you will be able to:
  - apply and establish communication processes with customers
  - visit or telephone customers at predetermined intervals
  - establish a reason to contact the customer
  - build partnerships with a range of customers.
2.1 Apply and establish a communication process with customers

- What is the value to the business of passing on the information (and receiving a reply)?
- In what stage of a business transaction the communication process takes place.
- What information does the customer need to receive?
- How regularly does the customer need to receive information?
- How urgently does the customer need to get the information (and for you to get a response)?
- What is the customer’s ability to receive the information in a particular way?
- How they will get back to you?
- The type of communication.
1. Imagine your business sells farm machinery. What communication process would you use to keep a local farmer informed:
   – of new developments in tractor tyres?
   – that his new plough has arrived for him to come and collect?

2. Imagine now that you own a business making curtains. What would you think if you continually received phone calls from someone selling timeshare?
2.2 Visit or telephone customers at predetermined intervals
2.3 Establish a reason to contact the customer
Activity 4

• You have sold someone an appliance but they have not paid on time. You need to call them to find out why they haven’t paid and when they will do so.

• Explain how a phone call of this nature can be used to encourage the customer to keep coming back to you for future business.
2.4 Build partnerships with a range of customers

- Joint objectives
- Exchanges
- New attitudes and behaviours
- Commitments
- Investments
Activity 5

• In what ways could the following pairs of businesses benefit from partnering?
  – A leather factory and a shoe manufacturer.
  – A chicken farmer and a fast food franchise.
  – An industrial machine manufacturer and a motor car factory.
3. Administer contact with a range of customers

- When you have completed this subject outcome, you will be able to:
  - Complete logbooks and/or call reports as per company requirements
  - Present analysis and/or report
  - Grade customers A / B / C
3.1 Complete logbooks as per company requirements

<table>
<thead>
<tr>
<th>XYZ Company : Customer complaint record</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Complainant's details</strong></td>
</tr>
<tr>
<td>Name of the customer</td>
</tr>
<tr>
<td>Contact details (phone, cell phone, postal address, e-mail address)</td>
</tr>
<tr>
<td><strong>Signature of the customer</strong></td>
</tr>
<tr>
<td>Date:</td>
</tr>
<tr>
<td>Time:</td>
</tr>
<tr>
<td><strong>Information relating to the complaint</strong></td>
</tr>
<tr>
<td>The nature of the complaint</td>
</tr>
<tr>
<td>Date and time of the complaint</td>
</tr>
<tr>
<td>The origin of the complaint</td>
</tr>
<tr>
<td>Expectations of how the customer expects the complaint to be dealt with</td>
</tr>
<tr>
<td><strong>Actions taken by the person receiving the complaint</strong></td>
</tr>
<tr>
<td>Promises made</td>
</tr>
<tr>
<td>Materials or documentation received from the customer</td>
</tr>
<tr>
<td>Who, if anyone, was the problem forwarded to?</td>
</tr>
<tr>
<td>Date, time and details of information passed on</td>
</tr>
<tr>
<td>Their signature confirming their receiving the problem</td>
</tr>
<tr>
<td><strong>Signature of the person receiving the original complaint</strong></td>
</tr>
<tr>
<td>Date:</td>
</tr>
<tr>
<td>Time:</td>
</tr>
<tr>
<td><strong>Signature of the person to who the complaint was forwarded</strong></td>
</tr>
<tr>
<td>Date:</td>
</tr>
<tr>
<td>Time:</td>
</tr>
<tr>
<td><strong>Signature of the superior of the person receiving the original complaint</strong></td>
</tr>
<tr>
<td>Date:</td>
</tr>
<tr>
<td>Time:</td>
</tr>
<tr>
<td><strong>Details of how the complaint was dealt with</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Signature of the person forwarding this information to the customer</strong></td>
</tr>
<tr>
<td>Date:</td>
</tr>
<tr>
<td>Time:</td>
</tr>
<tr>
<td><strong>Signature of the customer</strong></td>
</tr>
<tr>
<td>Date:</td>
</tr>
<tr>
<td>Time:</td>
</tr>
<tr>
<td><strong>Customer's response</strong></td>
</tr>
<tr>
<td>Satisfied</td>
</tr>
<tr>
<td>Not satisfied</td>
</tr>
</tbody>
</table>
3.2 Present analysis and/or report
Activity 6

• In the tables below, there are records of telemarketing calls for two different products, together with the sales figures for the products being marketed.

• Product “A” is already plotted as an example. Plot the points for Product “B” on the blank graph paper supplied overleaf and see what conclusions you can arrive at for both. What do you think management should do with this information?
Product “A”
Sales per week vs. telemarketing calls per week

Calls made

[Graph showing the relationship between sales per week and telemarketing calls per week.]
Product "B"
Sales per week vs. telemarketing calls per week
3.3 Grade customers A / B / C
The table below gives information about three different customers for different criteria. If “A” is best and “C” worst, how would you grade them according to each of the criteria, and what should management’s instructions be to staff as to how to treat them on the phone?
<table>
<thead>
<tr>
<th></th>
<th>Mr Bright</th>
<th>Ms Khumalo</th>
<th>Mrs Lotter</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Number of products bought</td>
<td>15</td>
<td>6</td>
<td>31</td>
</tr>
<tr>
<td>B. Profit made from sales</td>
<td>R1 800</td>
<td>R2 100</td>
<td>R2 900</td>
</tr>
<tr>
<td>C. Time to pay account</td>
<td>Immediate</td>
<td>Two months</td>
<td>Six months</td>
</tr>
<tr>
<td>Overall</td>
<td>?</td>
<td>?</td>
<td>?</td>
</tr>
</tbody>
</table>