

**FREE for each
participant!
CSM Framework™ CD
Value \$ 299**

CERTIFIED CUSTOMER SERVICE MANAGER - FINANCE SECTOR

A unique and intensive 5-day workshop designed specifically to meet the challenging requirements of Customer Service personnel in the Finance Sector.

Proactive Customer Service Management is key to keeping existing customers and winning new ones. Sources put average customer 'churn' or turnover at between 16% and 20% each year – and it can cost at least ten times as much to find a new customer as it does to keep an existing customer. And most business growth comes from developing existing customer accounts rather than by finding new customers. In today's highly competitive business environment, really knowing your customers and effectively interacting with them is vital. Increasingly, effective Customer Satisfaction Surveys and Customer Relationship Management systems play such an important role. Customer Service Management (CSM) is fundamental to any business to build customer trust and loyalty – but, in these troubled and uncertain times, CSM is particularly important in the finance sector.

Objectives:

On completion of the workshop, delegates will be able to;

- Understand the finance sector background, concepts, logic and issues of Customer Service Management in maintaining customer confidence, reducing customer loss, improving corporate productivity and profitability
- Know how to implement and use vital elements of Customer Service Management
- Develop world class techniques for Customer Service Management
- Develop a strategy for achieving and delivering excellence in Customer Service Management
- Identify and develop the interpersonal skills necessary fully to deliver customer focussed services
- Undertake a CSM skills audit and gap analysis
- Be aware of and respond to the importance of 'internal' customer relationship issues
- Understand the latest initiatives in Customer Service Management
- Develop new Customer Relationships
- Deal with complaints and difficult customers
- Appreciate the benefits and pitfalls of Customer Relationship Management computer systems
- Learn how to design, develop and implement Customer Satisfaction Surveys

Workshop Methods

Throughout this highly interactive workshop, hands-on exercises, real-life case studies and video clips from the finance sector will illustrate the teaching points.

Programme:

Day 1

Introduction, Course Objectives, Delegate's Requirement's Analysis

The Bird's Eye View – CSM Background and Benefits

- Customer Statistics
- Who Are Your Customers?
- The Power of the Customer: What it is and How it is Wielded
- Creating and Maintaining Customer Confidence and Trust
- Brand Value and Band Value: How to Create it.
- What Do Customers Expect?
- Preserving Customer Loyalty and acquiring New Customers
- The Role of CSM in your Sales and Marketing efforts

Customers, Clients and Intermediaries

- Different demands, different needs
- Is Win-Win Enough?
- What's in it for Them?
- Catalogue of Service, Modular and Tailored Services
- Unique Selling and Value Propositions

The Rol of CSM

- What Customers Do You Need?
Strategic, Tactical and Worthless Customers
- The Cost of Customer Churn
- Assessing Lifetime Value and Customer Retention Incentives
- The Promiscuous Customer
- The Role of the Customer Service Champion
- Customers – Your Best Salespeople!
- First Steps to CSM

Day 2

Assessing Your Own Customer Service Performance

- 10 Key Characteristics of Your Service
- 8 Key Audit Questions
- People and Systems
- Your Quickie CSM Audit
- Using Gap Analysis

Defining Customer Service and CSM: Channels

- Channels: Face-to-Face Customer Service; Customer Service Calls; internet, web and kiosks
- Comparative Costs
- Channel migration – how and why
- Total Customer Satisfaction and its Implications

Personal Effectiveness

- Understanding Yourself
- Effective Techniques for Time Management
- Learn How To Manage Stress
- How To Be A Self-Starter

- Communication Skills: Using the Right Words
- Developing Trust, Rapport and Empathy
- The Power to Influence
- Developing Assertiveness Skills
- Managing People for Success

Day 3

Motivating People to Care for Customers

- The Power of Emotional Intelligence and Engagement
- Essential Skills and Attitudes
- Recruiting for Excellence
- Creating Winning Teams
- Wearing the Customer's Spectacles
- Training Requirements
- Analyzing Customer Interactions at Multiple levels
- Predicting Customer Behaviour

Understanding Transactional Analysis

- Recognising Behavioural Modes
- Developing Transactional Analysis Skills to Manage Customers

Dealing with Difficult People

- Negotiation Skills
- Dealing with Objections
- Customer Perceptions and Expectations – Realistic?
- Dealing with Difficult Customers
- Dealing with Difficult Colleagues
- Why Customers and Colleagues Can Be Difficult
- How to Tell Customers What They Don't Want to Hear
- Personality Types and How to deal With Them

The Internal Issues

- Analyzing and Improving Business Processes
- Developing Customer-friendly Processes and Procedures
- Creating Service Strategies
- Developing a Service Culture
- Standards, Objectives and Performance Measurement
- Don't Just be SMART! Be SMARTER!
- Service Charters, Service Level Agreements and Operational Level Agreements

Day 4

Contact Center Excellence in the Finance Sector

- Contact Center functionality and optimization
- Contact Center and the role of effective communication (verbal/written)
- Contact Center technologies: An overview
- The Contact Center and the Internet: Using the Web for Enhanced Customer Satisfaction
- CSM in B2C and B2B environments
- Resource Issues
- From Call Center to Contact Center

CSM and the Sales Cycle

- Where CSM fits into the Sales Cycle

- CSM and Sales Support
- CSM and Sales Administration
- Contact Management and CSM
- CSM and After-Sales Support

Implementing Customer Relationship Management (CRM)

- 8 Steps to Implement An Effective CRM Project
- Common Causes of Failure and How to Avoid Them
- The legal implications of Customer Privacy
- EU & USA Privacy Law
- Why Customers Defect
- Challenges & Solutions
- Customer Retention Strategies
- A Look Into the Future

Day 5

How the Big Plan Fits Together

- Enterprise Resource Planning (ERP) and CRM: Relationships
- Supplier Relationship Management (SRM)
- Partner Relationship Management (PRM)
- Supply Chain Management (SCM)
- CRM and Data Warehousing
- Data Integration and Data Analysis
- Data Mining
- CSM: B2B & B2C
- CSM and Corporate Strategy

Customer Satisfaction Questionnaires: Designing, Developing, Implementing and Analyzing

- Measuring Customer Satisfaction: What's ACSI, EPSI & CSI?
- The Problems and Their Solutions
- Review the objectives of the Customer Satisfaction Questionnaire.
- Deciding on the Medium: Interviews, Paper or On-Line?
- Use of spreadsheets etc.
- Deciding on Content
- Prioritizing Objectives and Content
- Establishing Customer's Loyalty and Buying Intentions
- Evaluating and Validating the Questions
- Creating an unbiased sequence of Questions
- Deciding on the type of question
- Writing the questions
- Timing the length of the survey
- Pre-testing the survey
- Revising the Questionnaire
- Distributing the Survey
- Analyzing the Results – and Acting On Them

CSM Case Studies

Course Round-up, Delegate Forum and Individual Action Plan

Who should attend:

- All employees who have direct contact with customers or who have a role in providing service to them and influencing customer satisfaction.
- Sales and marketing professionals who engage in business development in a customer-focused environment and generate a customer base for their company.
- Business managers who manage large corporate, government and institutional accounts.
- Professionals involved in developing and preserving brand equity.
- Business managers whose business success depends largely on repeat business and a loyal customer following.
- Staff involved in customer support and customer care.

Note: Course timings and content may vary to reflect the needs of the participants.

Course Leader: Andrew Hiles

Andrew Hiles is a member of the British Computer Society. Andrew's experience includes HR, Finance, business analysis and projects management. He has some 25 years experience in customer support. Andrew was founder Chairman of the influential European Information Market (EURIM) group which supports the UK Parliament's All-Party EURIM Group in handling the impact of European legislation. He is a past Chairman of IBM GUIDE(UK) Operations Management Group and was founder and was, for some 15 years, Chairman of the first international user group for business continuity professionals. He wrote the book *Creating a Customer Focused Help Desk* (co-authored with Yvonne Gunn) and three books on Service Level Management. All are published by Rothstein Inc (info@rothstein.com). Andrew contributed to the authoritative Croner's *Guide to IT Purchasing* and to Croner's *Guide to Business Risk Management*. His software packages, SLA FRAMEWORK™, and Help Desk Framework™ have been purchased by leading international companies. Andrew also presents on buying and contracts for IIR ME.

After varied responsibilities spanning all IT functions, Andrew moved to the UK Post Office as their first Business Systems Consultant with responsibilities for major projects. Subsequently as Computer Services Manager at the UK Atomic Energy Authority's Harwell Laboratory he provided commercial bureau services and operational support of supercomputing, mainframe, mid-range and client/server installations which Harwell facility managed. He had Customer Support and Quality Assurance responsibilities for the service.

Andrew is a Director of Kingswell International consultants. He has helped hi-tech, financial, transport and government bodies to develop programmes for Service Management and Customer Support. These clients include multinational banks and insurance companies in the Middle East, USA, UK, Europe, Africa and the Pacific Rim.

Andrew was among the first in Europe to become accredited to deliver training courses of the Help Desk Institute (HDI) leading to individual certification, and site audits leading site accreditation.

Andrew is a published writer and international speaker on service management and has presented at Cranfield School of Management, Henley College of Management, GEC Management College, Dunchurch and on radio, television, audiocasts, webcasts and podcasts.

BOOKS

Hiles A.N. and Gunn, Dr. Y. *Creating a Customer-Focused Help Desk: How to Win and Keep Your Customers*. Published by Rothstein Associates Inc. ISBN 0-9641648-6-8 This book has the support of the Help Desk Institute.

Service Level Agreements, Winning a Competitive Edge for Supply and Support Services ISBN 0-9641648-4-1 published by Rothstein Associates Inc. This book applies Service Level Agreements to services other than IT. Real case studies and example SLAs are provided ranging from Finance, Human Resources, Logistics, through Training, Livestock Handling, Logistics and Field Service Engineering.

The Complete Guide to IT Service Level Agreements, Matching Service Quality to Business Needs. ISBN 0-9641648-2-5 published by Rothstein Associates Inc. The standard work on IT Service level Agreements.

Business Continuity Management: Best Practice. Published by Rothstein Associates Inc. This book explicitly covers all the ten areas of business continuity competence required for membership of the Disaster Recovery Institute International (DRII) and the Business Continuity Institute (BCI).

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