

# Customer First

The Journal of the National Customer Service Association

## Aflac Corporation Story

how it "Lives Its  
Dream, One Customer  
At A Time"

**Customized Solutions  
to Service Excellence**

**Discover the Prescription  
for Effective Leadership**

Laree Daniel, Chief Administrative  
Officer for Aflac United States  
Operations, proudly displaying  
the famous Aflac duck



NationalCSA.com

# In this issue...

## The first word...



### Welcome to Issue 2, 2014 of *Customer First!*

It is our privilege to continue to offer you excellent articles and information that focus on putting the customer first. The articles in *Customer First* are written exclusively for NCSA and contain some of the greatest practices and insights into customer service in the country. Please share this information with your co-workers and colleagues so that all will benefit from this information.

As we begin the summer season, many of you will be traveling to locations far and wide—domestic and international. You will experience customer service at all levels. You will discover those businesses that practice excellence in service for every customer every time and you will find some that come up a bit short. We encourage you to share your service experiences—both good and not so good—with these businesses and with us so that we can share with our extensive audience with the ultimate goal to improve customer service for all of us. Help them help you and others into the future. Everyone is better for it.

We wish you all a wonderful summer and hope you serve and are served in a positive and memorable manner.

Good luck in serving all your customers. We are here for you.

Best wishes,

C. William Crutcher, President  
National Customer Service Association

### 2 Featured Article

#### Living the Dream, One Customer at a Time

*Making customers for a lifetime—not just for the day*



### 6 Seven Commitments to Working the Aflac Way

*Common sense approach to guiding employees in behaving the Aflac Way*

### 7 Aflac Way Honors

*The basic steps to assure every employee demonstrates the Aflac commitment to great service with every interaction*

### 8 Service Builder Leadership = Hard Work

### 10 TCS United

*A business built to serve*

### 13 NCSA Chapter Outreach

### 14 Service Statistics Time-Wasters at Work

### 16 Do You Know These “Animals”?

*“Are your customers animals”? You might be surprised!”*

### 18 Service Reminder

**Building Customer Relationships**

### 19 The Last Word

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## LIVING THE DREAM, ONE CUSTOMER AT A TIME

BY LAREE DANIEL, CHIEF ADMINISTRATIVE OFFICER,  
UNITED STATES OPERATIONS, AFLAC  
AND NIVI NAGIEL, NCSA

In its 60th year of business, Aflac is living the dream of any company. Just some of their recognitions include:

***Fortune magazine's list of***

"The World's Most Admired Companies"—13 times!

***Ethisphere magazine's list of the***

"World's Most Ethical Companies"—8 years running!

***Fortune magazine's list of***

"100 Best Companies to Work For"—for 16 years!

And lest we think that any of these awards are simple to attain and retain, let us give you one example of the depth of investigation that goes into analyzing the candidates for Ethisphere magazine's list of the "World's Most Ethical Companies." Ethisphere magazine provides 75 survey questions annually to companies vying for the honor of being selected for the list. The questions focus

on philosophy, philanthropy, governance, how they handle challenge, etc. Beyond this survey, however, Ethisphere magazine also conducts intense research into the organizations to assure that the information provided by the companies is accurate and to determine whether they are indeed deserving of this recognition. Independent entities such as Ethisphere magazine are continuously confirming in this manner that Aflac truly "walks the talk" in customer service and corporate citizenship.

The philosophy that permeates Aflac is aptly named the "Aflac Way" and is their public commitment to great service. There are seven overarching "Commitments" and 15 "Basic" expectations (see Side Bars) to bring the commitments to life every day with every interaction. Laree Daniel, Chief Administrative Officer for Aflac, joined the company because of that commitment. Ms. Daniel's career has been primarily in the insurance industry, in all of its aspects—operations, direct sales and marketing. When considering a career with Aflac after being recruited in 2007, Daniel investigated the opportunity thoroughly before making her decision.

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The ethical nature of the business, starting at the top, was what initially attracted Ms. Daniel. Then she learned more about the quality of care which Aflac gives to its employees, and its willingness to be innovative and take risks. All of that fit Ms. Daniel's personal philosophies of service, so she accepted the position and now serves as Chief Administrative Officer for Aflac's United States operations and is ultimately responsible for 2,200 employees.

Then came her opportunity to bring the Seven Commitments with the accompanying 15 Basics to life from within her field of influence. "Communicate regularly, know your stuff, shoot straight, cover the customer—not your behind," are just a few of the "basics" for achieving the commitments of Aflac. Under her direction, The A Way Experience was launched, an initiative that helps employees understand the linkage between the Commitments and Basics, making it easier to apply them to provide consistently great service.

Aflac brings their "Aflac Way" to their nearly 4,500 employees spread around the country through cultural training that explains and demonstrates the culture. There is a focus on how people are treated in their culture—this makes their culture unique. Even employees who work from home are brought on-site to join their colleagues in the cultural training initiative so that everyone hears the expectations firsthand and understands why Aflac's culture is so important.

The process of engraining the Aflac culture in its employees begins with the onboarding process, where new hires attend a multi-day new employee orientation (NEO). At NEO, the employees are welcomed to the company and are introduced to a battery of lessons about the culture by officers at the most senior level of Aflac. They view videos from the CEO and CFO that reinforce the culture of ethics and are often treated to a visit from Aflac's General Counsel, who discusses the "Aflac Way" of doing business. While at orientation, each new employee is provided a hardcover copy of the "Aflac Way" booklet, which is theirs to read and keep. These booklets are often seen on the desk of both new and veteran employees at Aflac, which speaks to the handy reference it remains after orientation.

But the training doesn't end with the onboarding process. In fact, when you come to one of Aflac's offices, the handwriting is on the wall—literally. Throughout Aflac's campuses in Georgia, South Carolina, New York and Nebraska are images and inscriptions around every corner illustrating the company's Seven Commitments to working the "Aflac Way" and the 15 Basics of customer service. Glass doors and windows are frosted with the culture-reinforcing messages and, of course, you can't go anywhere without seeing the ubiquitous Aflac Duck.

Beyond the initial cultural training for all employees, and to better assure the expectations take hold and are acted on consistently each day, teams meet weekly for 10–15 minutes to help all employees at all levels understand how their role impacts the corporate mission and success. They also take this opportu-

***"Our Leaders are coaches...they bring out the best in people."***

nity to recognize employee life events like birthdays and anniversaries. Then they focus on the "Aflac Way" Commitment for that week by discussing a real-life example. "Our leaders are coaches. They have the responsibility of bringing out the best in people: Developing and implementing a customized management plan per person based on where they want to go," says Ms. Daniel. And that is why Fortune magazine has named Aflac as one of the "100 Best Companies to Work For"—16 years in a row!

Ms. Daniel acknowledges that since approximately 30 percent of their frontline employees work from home, staying in touch with them from a cultural perspective can be more of a challenge. Nonetheless, with video-conferencing and similar technology, employees are brought together for meetings and other appropriate encounters so that the "Aflac Way" is constantly reinforced throughout the system. It is often said that

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**Every year Aflac produces a holiday version of its plush duck and sells them with all the proceeds going to the company's primary philanthropic cause: Children's Cancer.**

adults learn best when they receive ongoing reminders of key cultural and functional expectations, reinforced by consistent leadership role modeling. Aflac has brought that concept to life within their workforce, and it obviously pays off, given all of their recognitions.

Of course, the ultimate reinforcement is how leadership behaves every day in every interaction with internal and external customers. Consistency of approach in living the Seven Commitments and the 15 Basics has carried Aflac to new heights of performance and is expected of all leadership from the top on down.

Ms. Daniel is proud of Aflac's recognitions but is very clear to state that "when you have loyal employees, that turns into loyal customers. If you treat your employees well, they are more likely to treat their customers the same way. Our employees are proud to work for Aflac. When they are engaged, the culture plays out every day," says Ms. Daniel. Beyond the formal national recognitions which Aflac shares with

all staff, they also have "Thank You Thursday," where any customer that calls in on that day can be chosen for a thank-you note from any of the Aflac Call Center's 600 employees.

While call centers typically have a very high turnover due to the amount of knowledge required, and the constant challenge of handling a variety of customers—from easily satisfied to extremely irate—all within a limited timeframe so that the next customer can be quickly served, Ms. Daniel reports that the turnover in the Aflac Call Center is extremely low. The average seniority of an amazing 10 years for employees under Ms. Daniel speaks yet again to Aflac's and Daniel's treating their internal customers as the vital asset that they are, thereby better assuring that the same treatment will be translated to its external customers.

To further engage its employees, Aflac encourages staff to participate in "Aflac Bright Ideas," which is an online submission of opportunities for improvement and innovation. Employees accumulate points for all submissions that they can utilize to purchase gifts and the top three ideas are recognized annually during Employee Appreciation Week with prizes including monetary gifts. The week includes entertainment, celebrations, a review of the company-wide mission of recognizing fellow employees for living the "Aflac Way" and a commitment to the Basics, followed by a public recognition of those efforts.

Oddly, we've hardly mentioned what most Americans best link Aflac with from a public perception standpoint—the "Duck." When it was first introduced millennial weekend, Aflac got an amazing response, despite the focus that weekend on the fears associated with Y2K. While the Duck is clever, cute and gets a lot of attention, even the best marketing campaign cannot sustain, in and of itself, the consistent level of customer and employee satisfaction scores that are evidenced by Aflac's numerous national awards. Employees are reminded that "You are the Duck. You are the brand," says Ms. Daniel. How each one of them behaves every day with every interaction sells the company over and over.

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Ms. Daniel is proud of how the Aflac team maneuvers through the landmines of challenge in their industry, assuring that there is an appropriate and constantly tested balance within their claim payment practices. "We understand the importance of having benefits paid during medical situations so we place a high priority on processing claims quickly, in an average of 4 days," says Ms. Daniel.

While Ms. Daniel and her leadership counterparts very much appreciate the recognition given them by Fortune magazine as one of the "100 Best Companies to Work For,"

they also do an employee engagement survey annually, with follow-up staff focus groups, where survey results are provided. The intent of the associated action plans is to assure that employee satisfaction at Aflac is always improving. Ms. Daniel reports that overall employee satisfaction in Operations at Aflac is 85 percent. Employees also have the opportunity twice yearly to respond to a survey about their leaders. Appropriate coaching plans are established to assure the leadership is supported and continually improving as well.

As a Fortune 200 employer, Aflac must constantly ensure that they are getting better every day. Their commitment to, "Be there for you in your time of need," calls them to action with every customer contact. But beyond their daily work initiatives to be the best of the best, Aflac is committed to support the Aflac Cancer Center at Egleston Children's Hospital in Atlanta, Georgia, which they established in 1995 with



**Each year during Employee Appreciation Week, Officers at Aflac, including Laree Daniel (middle), take part in daily drawings for Aflac employees to win big prizes.**

a \$3 million pledge. They maintain that support to this day, donating all proceeds from sales of the Aflac Duck to the Aflac Cancer Center.

Aflac holds all employees accountable for its high standards of customer service and ethical behavior. The dream they are living is one they have created and work hard every day to sustain. Living the dream takes constant focus and effort by the entire team, and Aflac seems to have that equation down to a science. ■

*Laree Daniel is the Chief Administrative Officer, United States Operations for Aflac.*

*Nivi Nagiel is an NCSA Editor.*

**ARTICLE PHOTO ON PAGE 2:** A team atmosphere in Aflac's Call Center is one of the things that has earned Aflac a place on FORTUNE's 100 Best Places to Work list for 16 consecutive years.

# *Seven Commitments to Working the Aflac Way*



# Aflac Way Honors

*Demonstrating our commitment to great service*

## Basic No. 1

*Remember that everyone whose work is affected by your work is your customer, but that our outside customers—policyholders, employers, agents, etc.—always take first priority.*

## Basic No. 2

*Every day, ask yourself what your customers and co-workers need to know today. Then tell them today.*

## Basic No. 3

*When a situation changes, tell everyone who is affected by that change.*

## Basic No. 4

*Contact your customers and co-workers regularly to ensure that you are aware of changes on their end.*

## Basic No. 5

*Leave no one wondering why you have not responded to their communication.*

## Basic No. 6

*Your customer is your first priority—not your supervisor or co-worker.*

## Basic No. 7

*When asked for help, deliver it yourself if possible.*

## Basic No. 8

*When you can't help someone yourself, find the person who can. Then immediately tell both people what you've done.*

## Basic No. 9

*Always remember that every action you take affects a real person who is worthy of your respect, whether it is a customer or co-worker.*

## Basic No. 10

*Behave with dignity.*

## Basic No. 11

*Your responsibility for a task ends when the task is resolved, not when it leaves your desk. Always confirm it was resolved successfully.*

## Basic No. 12

*You should never lie to or mislead a customer or a co-worker.*

## Basic No. 13

*Always tell your customers and co-workers everything they need to know about the issue at hand—not just part of what they need to know.*

## Basic No. 14

*Always take care of a customer's need instead of avoiding or assigning blame for the need having been overlooked.*

## Basic No. 15

*Correct mistakes—and apologize for making them—immediately.*

**Aflac**™

# Service Builder

## *Leadership = Hard Work*

***“Leaders aren't born, they are made. And they are made just like anything else, through hard work. And that's the price they'll have to pay to achieve that goal, or any goal.” - Vince Lombardi***

Successful organizations—those that are able to grow and sustain their competitive advantage—share many common traits. And the essential element at the foundation of their successes is effective leadership. Look into the inner workings of any strong business venture and you will, no doubt, find consistent, strong, dynamic leadership. Conversely, organizations that have failed over time have done so, in the most part, because of the lack of skilled and knowledgeable leaders.

One can review any number of sources and discover the “list du jour” for what it is that leaders must do to be successful. In our research and practice as long-time business professionals, university professors, adult educators and consultants, we find that leaders are genuinely effective when their day-to-day work activities are grounded in five essential functions. While the exact nature of these functions may vary by industry, ALL are present in strong, effective leaders across all business types. Here is what effective leaders do:



The first, and THE MOST IMPORTANT THING, that leaders do is plan. The nature or type of planning varies based upon the level of leadership within the organization. If we think in terms of a highway map, senior leadership selects the ultimate destination while middle and front-line leadership determine the route to reach the selected destination. All great leaders at every level within their organization are planners within their area of oversight and responsibility always connected to the strategic direction and Mission of the organization.



The second function that Effective Leaders must perform is organizing. In its simplest terms, it means finding the right people and putting those people in well-designed jobs that will lead to achievement of the organization's Mission and the employees' success. Employees want their talent and skills to be well used. They need to see the future in their jobs. How jobs are structured better ensure the individual wants and needs of your employees are appropriately met and the organization accomplishes what it must to grow.



The third function of effective leadership is initiating. It is not enough have excellent plans and great people – without action. Leaders set clearly defined performance standards with specific timelines - they let employees know what is expected of them. Scheduling, explaining and orchestrating work activities is a critical component of initiating. “Ready, Set” isn't anything without the “Go!”



The fourth function of effective leadership is supporting employees. Robert Townsend says, “a leader is not an administrator who loves to run others, but someone who carries water for his people so that they can get on with their jobs”. Highly effective leaders think in terms of being of service or actually working for their employees. This is the basis of the support function.

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The last function of effective leadership is control. While even the most effective leader understands that there is very little they actually "control", part of their role is to enable control in others, to let go and delegate appropriately and to, ultimately, understand that "control" is accountability for oneself.

## So, how do you stack up?

- **1. Plan:** Do you regularly and consistently plan for the organization's success and ensure that every employee within your oversight has current operational goals that support the Mission of your company?
- **2. Organize:** When filling positions, do you take the time to find the right employees—not just the brightest—but those whose personal values/guiding principles align with the organization's values and are complementary to a successful culture of teaming?
- **3. Initiate:** Do you ensure that plans are acted upon? Do you ensure that all employees have "line-of-sight" to the organization's Mission, thereby allowing them to maximize their contributions?
- **4. Support:** Do you work for your employees or do they work for you? Do you provide the right proportions of physical, intellectual and emotional support?
- **5. Control:** Do you have clear performance indicators—individual, departmental and organizational? Is there consistent monitoring and feedback? How well do you delegate?

Seek input from those around you: Supervisor, peers, subordinates—in order to know how you are perceived. Listen objectively and learn from the feedback making changes that work for you and those you serve. That becomes the measurement for how well leaders are truly:

### Planning, Organizing, Initiating, Supporting & Controlling

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# Sincerity of Service

BY STEVE PERALTA, TCS UNITED, INC. AND NIVI NAGIEL, NCSA

Springfield, Illinois—the state capital—is the home of TCS United, an affiliate of CCB Credit Services, which has been in business for over 80 years as a national accounts receivable organization. TCS United was incepted two years ago and targets Fortune 1000 organizations that utilize outsourced customer service, sales and market research solutions for a variety of business industries. TCS United serves their clients' customers as an extension of the source business. Their Mission Statement is to "Help clients bridge relationships with their customers." They do that with Call Center support, email communication, interactive voice response and fulfillment services.

TCS United's website says that "Many clients select TCS United to help benchmark internal operations, overflow customer support or to provide complete, turn-key, end to end customer service management." That "regardless of your needs, TCS United will develop a customized solution that is sure to help you meet or exceed your operational and financial objectives." But putting something on a website about your intentions and living them every day to an ongoing level of excellent customer satisfaction are two very different things.

It is very typical in our world today to call for repair support or to return a purchased item or to pay your utility bill, and to receive that service from an outsourced firm representing the client business. So what, you may ask, makes TCS United unique? Approximately two years ago, the privately held TCS United was only a concept in the minds and hearts of its owners. Since then, it has grown by adding value to its clients with every interaction. Serving as a member of the client team and assuring that line is invisible to the ultimate customer is the hundreds-of-times-a-



A TCS United customer service representative awaits the opportunity to serve with a smile

week challenge to TCS United, and they take that responsibility seriously. From the beginning, not only was the strategic plan for TCS United well thought out, but so was the cultural component—and this was the key to their rapid growth and success.

Steve Peralta is the Managing Director for TCS United and joined the firm nearly two years ago. He was drawn to the organization because of all of the typical things that bring any of us to a job—an opportunity in his current community to significantly contribute to a growing business line that would use his skills optimally. But it was more than that—the Mission of TCS United and the clear value system of the firm's owners and employees were the ultimate draw.

Peralta has spent his career in customer service and business process outsourcing, and is proud to be with TCS United, where he oversees business operations and works to sell TCS United services every day. "Our goal with every customer interaction is to add value," Peralta says. He is proud that the mottos of "can-do" and "customer first" are their daily mantras. "Our culture is one of empowerment, accountability,

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passion, and enthusiasm to help one another," Peralta reports. And their growth in 24 months from a concept to a nearly 100-person organization serving Fortune 1000 organizations clearly suggests that they are truly embracing that culture.

Yes, TCS United has been dedicated from the get-go to treating their employees well and empowering them to serve, while holding them accountable with each customer interaction. TCS United constantly monitors the level of customer service they are providing through a measurement called Net Promoter Scoring (NPS), where the live operator and/or an automated system assure that quality is defined by the customer. One hundred percent of their phone interactions are digitally recorded, which helps TCS United's leadership and staff to review and learn from actual service calls.

TCS United has set up internal mechanisms to assure that the data gained from their quality monitors helps improve their services. We all know that it is worthy to monitor quality, to collect and review productivity data—but taking action with that information is where the real courage is proven. That is what sets TCS United apart from its competitors—the sincerity of service.

To assure that the TCS United culture and vision are embraced and lived daily and not lost through the firm's expansion, TCS United has chosen to deploy a



**TCS United's name proudly announces its commitment to uniting clients through their customer service strategy**

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“TCS United's ability to quickly respond to our needs has helped us significantly grow our business over the past two-plus years!”

DIRECTOR OF CUSTOMER SERVICE FOR A COMPETITIVE ENERGY SUPPLIER

workforce within a centralized, state of the art, 52,000 square foot business center located domestically in the United States. At this point in their growth pattern, Peralta reports, TCS United "feels it is critical to be together to train, monitor, clarify, communicate, and support the empowerment concept that allows our employees to be 'brand ambassadors' with every customer experience. We truly have an 'open door' policy," says Peralta. "We hold focus groups with employees constantly and team huddles every morning, where we share the previous day's statistics, any new product information and, most importantly, recognize great performance."

TCS United takes their training seriously, assuring that it focuses on the importance of providing top-notch customer service through numerous modules on how to serve, how to satisfy, how to defuse a frustrated customer, where the employees' level of empowerment lies, etc. TCS United is currently evaluating a program that will certify all of its customer service associates in customer service delivery. "We balance quality with quantity, assuring not only compliance on behalf of all of our clients but also that quality is customized per client," according to Peralta. "Our Leaders are held accountable not just for a quota of inspections but to quality monitors as part of a 360-degree view of our service levels."

"One of our primary points of focus is the required level of confidentiality of client/customer information. We have a dedicated account team per client, where the Account Manager's role is to be an extension of that client—inspecting, managing the engagement from the client's perspective. The diversified project team from TCS United supports the Account Managers and is cross-functional, including IT, HR, Accounting, Training, etc. so the client has the advantage of direct and ancillary support behind them at all times,

assuring their name and product and/or service is well represented," reports Peralta. The Account Managers meet routinely with the clients on Key Performance Indicator success and satisfaction factors including efficiency/productivity, quality—including safety and timeliness—and, of course, revenue creation.

According to the Customer Service Manager for a national healthcare insurance provider—"TCS United is proactive and they work hard to help us better understand the needs of our customers each and every day. TCS United continually recommends solutions that help us improve our overall customer service delivery!"

***“We balance quality with quantity, assuring not only compliance on behalf of all of our clients but also that quality is customized per client.”***

How does TCS United motivate their staff in a very tough industry, where TCS United, by name, is invisible to the customer and, rather, is assumed to be a representative of the source business with every call? Where they are challenged to know as much as possible about that source business line so that they can fully assist the customers—absorbing the culture of the source business to assure that the service is seamless for the customer? TCS United proudly

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provides "positive reinforcement—early and often to their staff, particularly those on the service front line," per Peralta. "We celebrate our employee successes as they arise in team meetings and individually—on the firm Intranet and, of course, monetarily," says Peralta. TCS United realizes that its employees can only meet the challenges of their roles if they feel proud to be part of the TCS United team, inspired and recognized for their efforts every day.



**TCS United establishes and maintains a culture of personalized service at its home office headquarters**

"We have grown month-over-month from a start-up business to serving numerous client organizations that now provide referrals for us," says Peralta. Referrals are the ultimate compliment for any service company, and TCS United has that to be proud of as they continue to thrive. "Most importantly," Peralta reports, "we have fun. We have an opportunity and a challenge every day and are pleased that our work atmosphere is keeping our employee turnover below industry standards," which obviously bodes well for the continuity of service to the client and customer.

"We take a lot of pride in what we do—helping clients and helping people. We are extremely flexible in creating satisfaction according to client standards. No two days are alike so our work life is exciting." That's what makes TCS United stand out as a provider of excellent customer service—a true example of "sincerity of service." ■

*Steve Peralta is the Managing Director of TCS United, Inc., Springfield, IL.*

*Nivi Nagiel is an NCSA Editor.*

## NCSA Chapter Outreach

Recently, the NCSA has expanded its outreach program by creating the opportunity for the formation of Affiliate Chapters. These Chapters are local, autonomous organizations with the same objective as NCSA: promoting the furtherance of Customer Service as a worthy enterprise.

Local Chapter development—as well as its ongoing activities—is supported by the NCSA.

Currently, the NCSA hosts a monthly Chapter Development Conference Call.

Individuals interested in sitting in a future call, please send an email to Karon Peifer – [Karon.peifer@nationalcsa.com](mailto:Karon.peifer@nationalcsa.com) to receive call access information.

Additional information on NCSA Chapters may be found by going to the NCSA website – [www.NationalCSA.com](http://www.NationalCSA.com).

# Service Statistics

## *Time-Wasters at Work*

A recent survey by OfficeTime entitled "Top Time Killers", over 1,300 people—mostly freelancers, small business owners and other professionals—were asked how much time they spend on a variety of activities during the work-day. Below are the results on how employees spend their work day:

| ACTIVITY                          | PERCENT OF WORKDAY |
|-----------------------------------|--------------------|
| Email.                            | 44%                |
| Meetings.                         | 42%                |
| Surfing the Internet.             | 22%                |
| Travel time/commuting.            | 17%                |
| Procrastination.                  | 10%                |
| Nonbusiness-related conversation. | 7%                 |
| Watching TV or Internet videos.   | 7%                 |
| Break time.                       | 7%                 |
| Social networking for business.   | 6%                 |
| Dealing with computer problems.   | 6%                 |

Any of these deserves its own article but let's start at the top: email. On average, your employees are likely spending nearly half of their work-day on emailing. It is, therefore, absolutely critical that that process be efficient and productive or you are losing opportunities to serve customers optimally which means, bottom line, you are losing revenue.

### Some email hints.

It is appropriate to use email as your communication medium when:

- Information is not time sensitive.
- Recipient is difficult to see in person or reach by phone.
- Information needs to be shared with a large number of people.
- An electronic file must be transmitted.
- A written record of the communication is required.

### Email should not be used when:

- The sender is upset/emotional.
- The message has a large amount of detail.
- The content could create unnecessary legal exposure for the sender/organization.
- Information is of a personal nature.

The most effective emails address/focus on a single topic which allows the email to be archived by topic. The subject line should be "intelligent", i.e., provides clarity regarding the main point of the email—making it much easier to find for future reference. Be cautious about distracting backgrounds/wallpaper, font types, colors and solid caps—your message can get lost in all of this decoration.

Finally, emails maintain the same legal standing as other forms of business correspondence including emails you send to yourself if on the business server. Emails are official business records and, as such, are discoverable in legal proceedings.

For a meaningful in-service on Effective Email Use, contact the National Customer Service Association ([www.NationalCSA.com](http://www.NationalCSA.com)).



## ALWAYS THE RIGHT DIRECTION.

**Give Aflac a starring role in your life.** Our insurance policies work well with major medical insurance, giving you additional coverage when you're sick or hurt. We help cover what they don't—from out-of-pocket medical expenses and grocery bills, to childcare and the mortgage. Cash benefits are paid directly to you, regardless of any other insurance you may have.\* So when action happens, Aflac is ready and set.

Visit [aflac.com](http://aflac.com) for more information.



\*Aflac pays cash benefits directly to the insured, unless assigned.

Individual coverage is underwritten by American Family Life Assurance Company of Columbus. Group coverage is underwritten by Continental American Insurance Company (CAIC), a wholly-owned subsidiary of Aflac Incorporated. CAIC is not licensed to solicit business in New York, Guam, Puerto Rico, or the Virgin Islands. For groups situated in California, group coverage is underwritten by Continental American Life Insurance Company. For individual coverage in New York or coverage for groups in New York, coverage is underwritten by American Family Life Assurance Company of New York. Policies may not be available in all states. Some policies may be available as group policies. Worldwide Headquarters | 1932 Wynnton Rd | Columbus, GA 31999

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# Do You Know These "Animals"?

BY C. WILLIAM CRUTCHER, NCSA AND NIVI NAGIEL, NCSA

When you hear that customer “growl,” do you know what to do? Understanding what strategies to employ in serving customers is often a struggle at best—especially in the “heat of the battle.” You can’t always know what is driving a particular customer’s behavior, yet having some general insights would assist you in providing the very best of service—each and every time.

|          | Outgoing  | Reserved   |
|----------|---|--|
| Rigid    |  |  |
| Flexible |  |  |

**Giraffe (*Outgoing and Flexible*):** Because of their confidence and sophistication, the Giraffe easily becomes the center of attention. They display wit with an engaging sense of humor, but can sometimes be viewed as “snooty.” They tend to have a liberal view of the world and are open to new ideas. It is when you offer alternatives to the Giraffe that you discover their

flexibility and willingness to compromise.

There are some personal dynamics observable when dealing with customers that can help you determine specific service strategies you may want to employ. Within just a few moments of interacting with a customer, you can usually determine whether that customer is outgoing or reserved in their behavior, as well as whether they are rigid or flexible in their willingness to accept what you are able to offer. There are four “animals” that effectively represent these dynamics or traits: lion, snake, giraffe and owl. Let’s explore these “animals” in a little more detail.

## Animal Traits

**Lion (*Outgoing and Rigid*):** There is no doubt when a Lion is present. They command attention and will not hesitate to use their power to get what they want. They are courageous and unbending in their views. Lions tend to be loud—sometimes even appearing threatening—and often enjoy the attention they attract from bystanders; thus their “outgoing” dynamic is easily observed. It is when you—as the customer service professional—offer alternatives that the rigidity of their position is understood.

**Snake (*Reserved and Rigid*):** Feeling shy and somewhat insecure, the Snake tends to keep a low profile and does not seek to draw attention to itself. From a service perspective, they know what they want and are meticulous in the pursuit. While normally harmless, when they do not get what they want, they will not hesitate to attack, especially when they feel threatened or cornered.

**Owl (*Reserved and Flexible*):** A creature of high principles, the Owl is known for its quiet demeanor and overall integrity. They are sincere, calm and have keen insight. Being a good listener and thinker, they are able to see all sides of an issue and are willing to adjust their views given adequate reason to do so.

## Customer Service Strategies

The following are some helpful approaches to dealing with each of the “animals” when issues arise. While these are typically effective, it is important to recognize that as the service provider, you must be flexible in your approach, as each customer is unique.

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#### **Dealing with a “Lion”**

1. Move to a private location—away from other customers if possible—to reduce some of the “psychic reward” the Lion receives from sharing with bystanders.
2. Speak in a softer than normal voice.
3. Let the Lion talk themselves out—listen fully to every comment; make the Lion feel heard.
4. Be willing to compromise if you want to save the relationship.
5. You may have to “over-apologize”—this is not the time for a battle of wills.
6. Document proceedings immediately after the exchange—just in case the issue escalates.

#### **Dealing with a “Giraffe”**

1. Acknowledge the Giraffe for their understanding.
2. Be appreciative of their suggestions—thank them for their thoughtfulness.
3. Work to a win-win outcome—it is the only real acceptable outcome to a Giraffe.
4. Be prepared to deal with “Why not?” questions—that is the “flexibility” dynamic in action.
5. Explain how your solution is beneficial to both parties—and ensure it really is.

#### **Dealing with a “Snake”**

1. Express confidence in finding a viable solution to the issue.
2. Avoid confrontational or threatening communication—both verbal and nonverbal.
3. Know your policies and apply them consistently and fairly—use the “velvet hammer” approach.

4. Do not underestimate the persistence of the Snake—they know what they want and are patient in the pursuit.
5. Follow-up to verify the solution is/was satisfactory—Snakes are often not vocal and require inquiry to determine if they are satisfied.

#### **Dealing with an “Owl”**

1. Be an active listener—let them know you are both listening and understanding.
2. Build a relationship—you want Owls as repeat customers.
3. Acknowledge the Owl’s understanding of the situation.
4. Work in a collaborative manner—the highest form of win-win—to get what you both need out of the interchange.
5. Offer sincere praise and gratitude—the Owl can make your company better if you take their input seriously.

### **Conclusion**

Everyone should recognize that customer service is not a one-size-fits-all proposition. It is the job of customer service professionals to work with each and every customer to strive for satisfactory outcomes. Remaining observant and looking for customer-provided cues, as described in this article, can assist you in working toward that objective. ■

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**LAND OF THE FREE BECAUSE OF THE BRAVE.**

## Service Reminder

# Building Customer Relationships



- Be professional
- Offer a sincere smile
- Address customer by name
- Listen without interruption
- Give more than expected
- Make it happen
- Express genuine gratitude
- Follow up as necessary



# ...the last word

*Always give people more  
than they expect to get.*

*~ Nelson Boswell*

When it comes to excellence in customer service, there is no such thing as sufficient. When customers get what they expect from you, there is no “Wow!” factor. Your job is to always make the customer feel special—never just average. People forget average. They don’t tell their friends, family and colleagues about average. And often, they don’t return to average. Sufficient isn’t enough. ■



**“Wow!” the customer and they will tell everyone.  
Most importantly, they will return!**

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