Determining Customer Priorities

Partner Training Modules

Module Six

Primary Objective of the Workshop

1. Determine the kinds of questions that will uncover the Customer's needs, expectations and priorities.
2. Sequencing questions for maximum effectiveness in building rapport and trust.

Before you conduct the workshop

1. Verify that the PowerPoint is loaded and ready to run.
2. If the workshop includes video and you are going to use it, verify the proper operation of the video.
3. Verify the printing of the workbooks & the availability of pens/pencils.
4. Check the room set up.

Facilitation Keys to Remember

1. Review the slides and key points.
2. Talk to the participants, not the screen.
3. When you ask a question, let participants answer.
4. Ask questions early on to get workshop participants immediately engaged.
5. The participants should talk 50% of the time.
6. Try to get most of the participants involved in the conversation.
7. When participants ask a question, repeat the question so that everyone hears it.

Slide 1 – Imperative 1

Introduce Module Six of the Partner Training Modules.
The first imperative is to determine the kinds of questions that will uncover the Customer's needs, expectations and priorities.

Slide 2 – Imperative 2

The second imperative is to sequence questions for maximum effectiveness in building rapport and trust.

Slide 3 – Customer Priorities

Ask participants how we know if we are meeting Customer needs and exceeding their expectations.

Answer: Ask them.

When technicians arrive at a building, they may be inclined to get to work immediately. The faster they get the problem fixed, the happier the Customer will be. Right? Wrong!

Although the Customer has already shared the problem with customer service, we all know that information can be misinterpreted as it passes from one person to the next.   It's our responsibility to work directly with our customers to find out the exact situation.
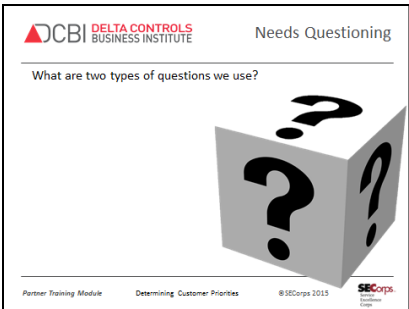
Slide 4 – Needs Questioning

Ask participants to explain the difference between open-ended questions and close-ended questions.

Answer:
Open-ended questions lead to conversations. "What do you think?" "How do you feel about that?"

Close-ended questions lead to direct answers. "is it too hot in here?" "Do you want to reduce your energy costs?"

Keep these two types of questions in mind as we take a look at how to uncover the needs of our customers.

Slide 5 – SPE Method

Uncovering the Customer's needs is like being a detective. Many people are reluctant to share information. Here is a questioning process that is helpful and easy to remember:

Site Questions – These are questions relating to facts and background.

Problem Questions – These are questions that explore problems, difficulties, and dissatisfaction in service-related areas.

Expectation Questions – These are questions that will get the customer to tell us exactly what they expect from us. What will make this call a success in their view?

If questions are structured as open-ended, a greater depth of information will be obtained. To be effective, service providers should structure their questions in these specific areas.
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Slide 6– Planning Our Questions

Ask participants to identify in their workbooks two general problems or issues their customers might typically experience.

Ask participants to share some of their answers.

Slide 7 – Site Questions

Examples:
- What's the specific problem?
- What areas of the building are affected?
- Is the entire space affected or only parts of it?

Ask participants to write an open-ended Site question to address the two general problems they have written down. Discuss possible answers.

Slide 8 – Problem Questions

Examples:
- When did the problem begin?
- Has this problem occurred before?
- How often has this occurred?
- What's been done previously?
- Who else has worked on this equipment?

Ask participants to write an open-ended Problem question to address the two general problems they have written down. Discuss possible answers.

Slide 9 – Expectation Questions

Examples:
- What temperature do you expect in the area?
- What time do you expect the area to reach that temperature?
- We won't be able to finish the work today. Will it be okay if we get it done by noon tomorrow?

Ask participants to write an open-ended Expectation question to address the two general problems they have written down. Discuss their answers.

Slide 10 – Off Site

Ask participants how to handle a situation in which the Customer contact is off-site and can't meet in person. Discuss participant answers.

Emphasize the following:
• We must always phone the contact before we begin work and go through our SPE Method of asking questions until we know exactly what is expected of us.
• Make sure to assure the contact that we will call them when the work is complete to report how we have resolved the problem.

Slide 11 – Customer Interaction

There is one person who can give us all of the information we need to ensure that we exceed their expectations—the Customer. Therefore, it is extremely important that we give our customers the freedom to talk about their concerns.

Ask participants what they see as the most important customer interaction goals for our company. Emphasize the following:

1. *To convey our commitment to providing exceptional customer service and assuring our customers that we will solve their problem quickly and efficiently.*
2. *To ask relevant questions that will help uncover all of the needs of the Customer, including those that are emotional.*
3. *To build loyalty and enhance the long-term business relationship between us, our customers and our company.*

Slide 12 – Role Play

Divide participants into pairs.

Explain that participants will use one of the two general problems they wrote down earlier as a scenario to practice the SPE method of asking questions. Playing the role of the "Customer," a participant will read one of their general problems. The "technician" should then ask questions using the SPE method, which the "Customer" will answer with the appropriate details.

Each pair will take turns playing one of the two roles.

Slide 13 – Role Play Review

Ask participants if they were able to find out the information they needed as the "technician." Did they find the SPE Method effective? How could they improve when interacting with a real customer?

Slide 14 – Alternate Exercise

As an alternative to the role play, engage the participants in a discussion about the SPE model. Given one of the three variables—site, problem, expectation—how do you construct the other two for the Customer?

Slide 15 – Review

Using the SPE model, how can you build confidence and trust for the technician, the company and the Customer?

According to a recent study conducted by the Concerto Marketing Group, 83% of Customers that believe in a company will share that belief with other potential customers. These same trusting Customers will continue to choose your services.

Slide 16 – Review

There are two key points to review in this workshop:

1. When it comes to site, problem or expectation, which of these three seems predominant and why?
2. In considering the interaction of goals, what can we do together to make a real difference?

Slide 17 – Questions

Questioning is an important tool that, when used correctly, can be very effective in discovering the needs, wants and expectations of our customers. Remember, we can't meet needs and exceed expectations unless we know what our customers want. Communication is the key to any lasting customer relationship.

Time permitting, give workshop participants the opportunity to raise questions. As much as possible, encourage other participants to answer the questions raised.

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