



## Foreword

The Hong Kong Association for Customer Service Excellence (HKACE) was founded in February 2000 to promote customer service excellence in Hong Kong. To this end, we have initiated a series of publications on various subjects in the field of customer service.

Customer Service Professionalism is our focus this year. Customer-focused organizations, customer service practitioners and the Government of the Hong Kong Special Administrative Region (HKSAR) have been relentlessly driving service excellence in the past few decades. As a result, customers have benefited from excellent customer services, while service providers have achieved remarkable business results and customer growth. However, with ever-rising consumerism and customer expectations, coupled with keen competitions in the marketplace, there is no room for complacency. Service-oriented organizations and their staff need to strive for professionalism to sustain customer satisfaction and loyalty, and to expand their new customer base.

HKACE appointed Hong Kong Productivity Council (HKPC) in September 2005 to organize two workshops entitled “Professionalism in Customer Service”, with an objective of understanding how to achieve professionalism in customer service. The ideas collected in the workshops are summarized in this document — “Guide to Customer Service Excellence (11) - Professionalism in Customer Service.”

We hope readers will benefit from the insights contained in this publication and be inspired to take an extra step to provide professional customer service to customers.

Allan Chiang  
Chairman  
Hong Kong Association for Customer Service Excellence

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## Acknowledgement

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First, we would like to thank all the participants who openly shared their valuable experience and real-life examples in the workshops. We would also like to thank the team led by Mr. Cliff Kong of HKPC, which completed the guidebook design and content development in a highly professional manner.

We hope you will find this publication a useful resource and reference for you and your organization.

### Project Team

#### **HKACE Best Practice Sharing Task Force**

Mr. W.N. KONG

Mr. Alex TANG

Ms. Brenda CHAN

Ms. Stella LAM

Ms. Eunice MIU

Ms. Polly WOO

Mr. Solomon LI

Mr. Ralph BUT

#### **HKPC Team**

Mr. Cliff KONG

Ms. Cindy LUI

Mr. Samson LEUNG



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## Why Customer Service Professionalism?

The driving forces for Customer Service Professionalism are derived from the market, organizations and customers.

### Competitions

- More choices of service providers
- Keen competitions among industry players
- Continuous upgrade of service hardware (service process, retail shop design and decoration, company image, etc.) and service software (customer service mindset, customer interaction skills, product knowledge, etc.)

### Organizations

- Desire to improve business bottom-line
- Need to enhance customer satisfaction and customer loyalty
- Need to protect stakeholders' interests

### Customers

- Rising expectations on customer service
- Increased awareness of consumerism
- Easy access to abundant knowledge and information on products and services

## Definition of Professionalism

If you look up the word '**Professionalism**' in a dictionary, you will find the following explanations:

- '**Mark or qualities of a profession.**' - *Oxford Advanced Learner's Dictionary*
- '**The combination of all the qualities that are connected with trained and skilled people.**' - *Cambridge Advanced Learner's Dictionary*

When we think of professionalism, our minds usually associate it with professions such as doctors, lawyers, accountants, pharmacists, pilots and so on. Nevertheless, customer service practitioners can be professional as well.

Professionalism in any trades presupposes:

- A set of values and attitudes
- A body of knowledge, expertise and skills
- A set of standards for all of the above

Here is an example of the professionalism of a doctor.



Professionalism	Behaviors
<ul style="list-style-type: none"> <li>• <b>A set of values and attitudes</b></li> </ul>	<ul style="list-style-type: none"> <li>• Care about patients' rights</li> <li>• Demonstrate fairness to all patients</li> </ul>
<ul style="list-style-type: none"> <li>• <b>A body of knowledge, expertise and skills</b></li> </ul>	<ul style="list-style-type: none"> <li>• Possess profound medical and medicine knowledge</li> <li>• Perform diagnosis and pertinent treatment</li> <li>• Operate medical equipment</li> </ul>
<ul style="list-style-type: none"> <li>• <b>A set of standards for all of the above</b></li> </ul>	<ul style="list-style-type: none"> <li>• Pass medical examinations and training</li> <li>• Comply with medication standards and procedures, codes of practice, etc.</li> <li>• Become members of recognized professional medical associations, and abide by rules and regulations thereof</li> </ul>

In the broadest sense, **Customer Service Professionalism (CSP)** means *the ability to deliver the qualities and competencies of customer-oriented service with passion.*

Professionalism	Customer Service Practitioners
<ul style="list-style-type: none"> <li>• <b>A set of values and attitudes</b></li> </ul>	<ul style="list-style-type: none"> <li>• Be passionate about the customer service profession</li> <li>• Develop the mindset of 'Customer is always right' and 'Treat customer as friend'</li> <li>• Be self-disciplined at all times</li> </ul>
<ul style="list-style-type: none"> <li>• <b>A body of knowledge, expertise and skills</b></li> </ul>	<ul style="list-style-type: none"> <li>• Master customer service knowledge and skills               <ul style="list-style-type: none"> <li>- Laws and legislations</li> <li>- Languages</li> <li>- Communication skills</li> <li>- Interpersonal skills</li> <li>- Complaint and crisis handling skills</li> <li>- Emotional quotient and stress management</li> </ul> </li> <li>• Develop job-related competencies               <ul style="list-style-type: none"> <li>- Self-leadership and teamwork</li> <li>- Problem-solving and decision-making skills</li> <li>- Service quality management                   <ul style="list-style-type: none"> <li>■ Quality improvement tools and techniques</li> <li>■ Customer satisfaction measurement tools and techniques</li> <li>■ Customer experience management</li> <li>■ Customer relationship management</li> </ul> </li> <li>- Information technology</li> </ul> </li> <li>• Sustain life-long learning               <ul style="list-style-type: none"> <li>- Attend customer service training and seminars to understand the pulse of customer service trends and customer needs</li> <li>- Keep abreast of developments and insights in your industry through various channels and media</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>A set of standards for all of the above</b></li> </ul>	<ul style="list-style-type: none"> <li>• Set stretching service performance goals to raise customer satisfaction level continuously</li> <li>• Set learning goals to acquire additional job-related knowledge, skills and recognized qualifications for continuous improvement in performance</li> <li>• Review and update customer service standards regularly to keep abreast of the ever-changing markets, customer needs and expectations</li> </ul>



## Building Customer Service Professionalism

There is no magic to achieving Customer Service Professionalism. You can apply this formula: **Customer Service Professionalism = E<sup>3</sup>C<sup>3</sup>**, where **E<sup>3</sup>** stands for **Expertise, Ethics, and Enthusiasm**, and **C<sup>3</sup>** stands for **Credibility, Care and Courage**.

### Expertise

Knowledge is information about a subject which has been obtained by experience or study. On the other hand, expertise is a high level of knowledge and experience. For example, a property agent can give factual information to customers who enquire about properties. However, expertise includes also insight, prediction or unique point of view deduced from facts, experience, analyses, common sense and personal judgment.

## Case Study 1

I went to a hair salon for a hair cut one day. When I lay down on the chair for hair washing, the hair-dresser asked me if the temperature of the water was okay. I told her that I usually prefer the water to be hotter. So she adjusted the temperature a bit higher. But then, I screamed because the water was too hot.

There was no doubt that the hair-dresser knew which shampoo was suitable for my hair, the steps of cleaning and conditioning my hair, and the importance of asking me about the water temperature. But she missed the fact that the water temperature was different after the tap had been turned on for a while. This explains what expertise is!

## Case Study 2

After a meeting at 4:30 p.m. with a client in Cheung Sha Wan, Mr. Chan was going for another meeting on the Hong Kong side at 5:30 p.m. Unfortunately, it was difficult to get a taxi because most of the taxi drivers were having the shift duty change. Mr. Chan finally got on a taxi after a few tries in vain. Mr. Chan was worried of being late, so he asked the taxi driver to drive a bit faster. The taxi driver advised him that driving faster could not help because there was a traffic jam at the Hung Hom Cross Harbour Tunnel. The taxi driver asked Mr. Chan if he would like to take the Western Tunnel but it would cost a bit more. When the taxi had crossed the Western Tunnel, the driver told Mr. Chan not to worry because it would only take another 10 minutes to get to the destination on time.

A professional taxi driver not only knows how to drive the customer to the destination safely and comfortably, and without violating the traffic regulations, but also is able to give advice on the traffic conditions, suggest the best alternative routes, and most important of all, give peace of mind to the commuter.



To be a Customer Service Professional, we should master knowledge and expertise in the following areas:

- Industry
  - Best practices
  - Latest market trends and intelligence (also about competitors)
- Your Organization
  - Products / Services
  - Service pledges and standards
  - Service strategies, policies and procedures
  - Competitive edge
- Your Customers
  - Needs
  - Expectations
  - Personalities
- Your Own
  - Proficiency in languages — Chinese, English and Putonghua
  - Analytical thinking
  - Reasoning skills
  - Knowledge in related areas

It is the common practice for professional bodies for doctors, lawyers, accountants, etc. to certify the knowledge and skills of their members through examinations or accreditation. Membership of these professional bodies is a sign of recognition and also social status.

## Ethics

Ethics means truthfulness, honesty, fairness, openness, obedience to the laws and legislation, respect for others, and self-control.

Some ethical behaviors at work are:

- Communicate sufficient information to customers for their decision-making e.g. features and benefits, warranties, exchange and refund policies, calculation of interest rate, etc.
- Explain the customer's obligations e.g. contractual terms and conditions, credit re-payment period, etc.
- Do not give offensive comments on competitors and their products / services
- Show respect to customers of whatever nationalities and cultures
- Work to the highest standard at all times even without supervision
- Comply with occupational safety and hygiene legislations
- Protect the company's assets from wastage and theft

## Case Study 3

Mary has been working as a Salesperson in a boutique for more than 2 years. Since Mary always demonstrated good customer service and selling skills to customers, she won the trust of many customers. During the past year, Mary received customers' offer of concert tickets, red packets, gifts, etc. as a token of appreciation of her excellent service or special service such as reserving new products, prioritizing bargain sales, etc. However, Mary declined the kindness of all the customers because the company did not allow staff to accept gifts and money from customers in the course of business.





# Case Study 4

John was going to install broadband internet service in his new home, so he went to one of the telecommunication companies for application. John found that the salesperson was very professional because the salesperson made efforts to understand his needs patiently, explained the benefits of the services and checked if the services would meet his requirements. Moreover, unlike the mediocre salespersons, he explained the terms and conditions of the contract, criteria for entitlement to different free gifts and cancellation policies clearly. When the application procedures were completed, the salesperson also advised John of the technical hotline and customer service hotline telephone numbers before saying goodbye to him.

## Enthusiasm

Enthusiasm means a strong interest in service excellence and an eagerness to serve customers. Without enthusiasm, one may deliver service like a robot — and customers can feel it.

The behaviors below are some indications of enthusiasm:

- Accomplish assigned tasks efficiently ahead of time
- Share others' workload willingly
- Study product knowledge or work-related information in one's own time
- Explain patiently even when the customer shows no sign of purchase
- Take extra efforts to help the customer even though the customer's request is out of the scope of responsibilities
- Take up extra work as learning opportunities

# Case Study 5

Peter is an industrious customer service representative in a Chinese restaurant offering Cantonese food. He has spent time to learn the food and beverages offered in the restaurant, the ingredients of different dishes, cooking methods, tastes of food, etc. Moreover, he studies Western and Chinese cooking recipes and tastes the dishes offered by competitors.

With good preparation, Peter can perform his duties smoothly. He can tell customers the Soup of the Day without asking his colleagues or supervisor. To the customer's astonishment, he can even tell the legendary story or origin of the dishes.

# Case Study 6

A primary school student was searching on the internet to find suitable materials for a project. He found from the website of a public utility company that there was a publication which was useful. So he asked his mother to telephone the public utility's customer service hotline to get a copy. When the mother phoned the hotline, the Customer Service Representative (CSR) told her that all the stock was exhausted. The mother was very disappointed, but the CSR took the initiative of finding her a spare copy from another department. In the end, both the mother and her boy were more than delighted.

In this case, the CSR could simply tell the customer the fact and end the call. However, she made extra efforts to help the customer, which showed she really cared about customers. A professional CSR not just gives answers but really helps the customers.





Sometimes we use the word enthusiasm interchangeably with devotion, eagerness, zeal, etc. Enthusiasm is derived from passion. To be professional, you need to be passionate about your:

- Organization
- Products / Services
- Customers
- Colleagues, etc.

You can try the following questionnaire to see if you are a passionate person.

### Are You Passionate?

Check the statements below that are TRUE for you. Be honest to yourself.

- \_\_\_\_\_ 1. I feel not satisfied with my life.
- \_\_\_\_\_ 2. I do not feel that I am doing my best or achieving the most I can.
- \_\_\_\_\_ 3. I do not feel excited about my day-to-day activities.
- \_\_\_\_\_ 4. I often feel stuck or unable to change my current situation.
- \_\_\_\_\_ 5. I am not sure what I want to do in my life.
- \_\_\_\_\_ 6. I don't remember or know what really excites me.
- \_\_\_\_\_ 7. I wish I had more time to do the things that make me happy.
- \_\_\_\_\_ 8. I often feel reluctant or uninspired when going about my daily routines.
- \_\_\_\_\_ 9. I do not like to pursue new or unexplored interests.
- \_\_\_\_\_ 10. I am apathetic or uncertain about my future.

Give one mark for each statement that is TRUE and check the result below:

Mark	Description
0-1	You are a passionate person
2-4	You are missing some opportunities to incorporate more passion in your life
5-7	You are dissatisfied with the things in your life
8-10	You are suffering from severe passion deficit



## Credibility

Credibility is built on actions, not just on verbal commitments. Credibility can help build rapport and long-term relationships with customers.

Here are some guidelines for building your credibility:

- Be fair to all customers to prevent double standards
- Deliver what you have promised the customer
- Speak and act appropriately at all times - never pass on misleading information to customers nor criticize them
- Respect the customer's rights especially when there is disagreement
- Follow the rules and regulations on disclosure of information

## Case Study 7

A customer at a fast food restaurant was about to have lunch but found that there was some dirt on the spoon. So he approached the counter staff to change for a clean one. The counter staff looked at the spoon for a short while to spot the dirt. He then said to the customer that the spoon was really dirty.

The counter staff should have exchanged the spoon without any hesitation. The request was straight-forward and immaterial, which did not need a second thought or authentication. Had the counter staff done it immediately, it would have shown that he believed in and respected what the customer was saying.

## Case Study 8

A few service technicians on company uniforms were having lunch together in a restaurant. As they were enjoying their food, they discussed about the customers whom they had served in the morning. One of them commented loudly: "I think that the administration manager of ABC company was really unreasonable and he abused the customer's rights. I don't understand why today's customers are so demanding. We have done our best to check the machine, replace the parts and do everything to satisfy them. But, at the end of the day, they were still not satisfied ...". Other colleagues seemed to agree with his point of view and joined the conversation by saying some more bad things about the customer.

If you were the people overhearing the above comments, would you use the products / services of this company?



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## Care

One of the pre-requisites of customer service professionals is care. Care for customers means:

- Treat customers as your friends
- Put the customer's interest before yours
- Focus your full attention on the customer you serve
- Listen actively to what the customer says
- Show empathy to the customer's concerns, worries, complaints, etc.

In the course of providing service, mind your verbal and non-verbal communication. Otherwise, it will undermine your image of care.

- Using inappropriate wording  
e.g. "Mr. customer, you have to line up for the repair service at the end of the queue there."
- Showing improper body language  
e.g. eyebrows frowned, stern face, puzzled facial expressions, etc.

## Case Study 9

A foreign woman with her baby heading for home was delayed while in transit through Hong Kong. They were held in custody at the Chep Lap Kok Airport pending resolution of some immigration issues. As a result, the mother ran out of milk for the baby. When the airline stewardesses knew about this, they took turn voluntarily to cook congee for the baby for a few days, until immigration clearance.

## Case Study 10

Mr. Chan went to a shop to buy a new camera for his holiday trip to Japan. The Customer Service Representative (CSR) recommended a camera which met Mr. Chan's specific needs. However, when he tried the camera at home, it could not perform the function that he wanted. So Mr. Chan took the camera back to the shop. As the CSR showed care and willingness to help, Mr. Chan was convinced to exchange the camera for another brand.

Mr. Chan took the camera to the trip but it could not function properly. He was very unhappy and took the camera back to the shop again, when he came back to Hong Kong. The CSR apologized to Mr. Chan for the inconvenience and took the trouble of finding out in detail what went wrong. In the end, the CSR found out that Mr. Chan was a novice, and so exchanged the camera for a new one with easier-to-use functions. Moreover, the CSR took time to share some operation tips and trouble-shooting techniques with him. Notwithstanding the unhappy experience, Mr. Chan appreciated the care and professional service of the CSR.



## Courage

If one does not have the courage to take risks, one will unlikely become a successful entrepreneur. Richard Branson of Virgin Atlantic Airways is a renowned entrepreneur who dares to take bold decisions at work and in personal life.

To have courage means:

- Take calculated risks
- Take responsibility for one's actions and decisions
- Take up the responsibility of handling demanding customers
- Admit mistakes for anything done wrong and identify areas for improvement
- Make the right decisions at the right time to help customers

## Case Study 11

The Chan's family joined a sight-seeing tour to a South-east Asian country for their holiday. On one night, a hotel staff member notified the Chan's family that there was a suspected thief on the floor they were staying. He advised the customers to lock up the windows and doors, and to be careful with strangers. When the Chan's family heard about the news, they were so frightened that they could not sleep. So they asked the tourist guide to change their room to another floor for them. The tourist guide not only arranged for another room for them but also — to their great relief - stayed overnight with them in their room.

## Case Study 12

Lily is a Customer Service Representative of a retail shop, and is tactful, with good interpersonal skills. A demanding customer goes there for shopping from time to time, and almost all staff are not willing to serve him, except Lily. So Lily's colleagues asked her one day: "Aren't you afraid of the demanding customer who always make unreasonable complaints to the Shop Manager about our service attitude?" Lily replied: "I see this as a learning opportunity to sharpen my interpersonal skills. The customer is demanding but is not much different from other customers. What you need is a little more patience, respect and assertive communication skills. I think the most important thing is the courage to try out the first time."



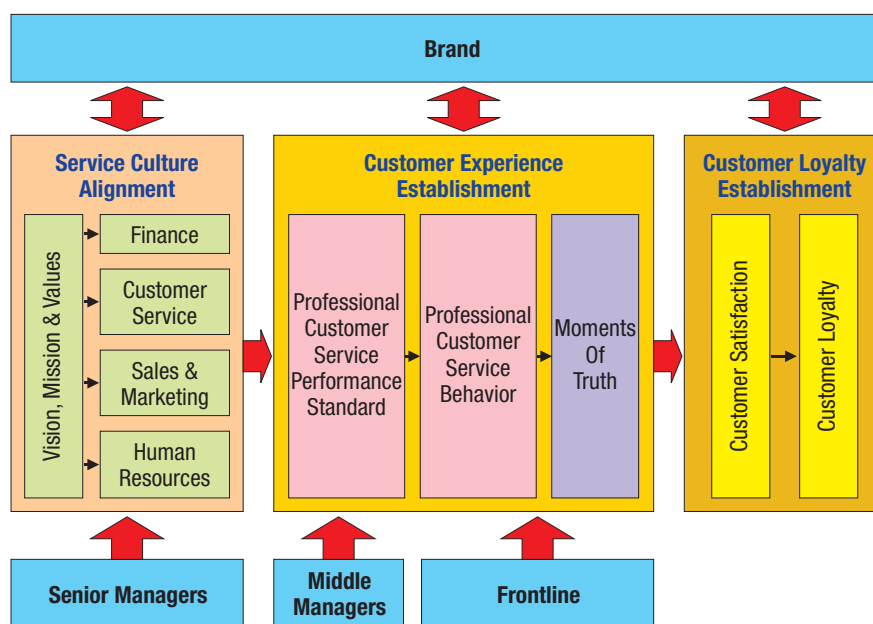
## Customer Service Professionalism vs. Customer Service Excellence

Based on our understanding of professionalism in the last section, the differences between Customer Service Professionalism and Customer Service Excellence are summarized below:

Perspective	Customer Service Professionalism	Customer Service Excellence
1. Service Focus	Customer Values Customer Loyalty	Customer Needs Customer Experience
2. Service System	Empowerment Flexibility	Service Standard Rules and Regulations
3. Service Mindset	Passionate Perseverance Adversity Quotient	Proactive Commitment Emotional Quotient
4. Knowledge & Skills	Expertise Consistency Certification / Accreditation	Knowledge Reliability Training

## Professional Customer Service Organizations

Professionalism is everyone's business in building the brand's image and customer satisfaction. Senior managers are responsible for building and aligning the service culture and strategies across the board. Middle managers are responsible for planning, setting and monitoring professional customer service performance standards. Frontline staff should develop professional customer service behaviors and demonstrate them in the 'moments of truth' to enhance the customers' experience.





According to surveys, most successful service-oriented organizations adopt the following strategies to enhance the professionalism of their service:

- Analyzing customers' needs and expectations
- Enhancing customer service experience
- Managing customer relationships

#### **A. Analyzing customers' needs and expectations**

Professionalism ensures delivery of customer service of a high standard. However, this may not satisfy all customers equally. Therefore, customer service professionals must understand customers' varying needs and expectations in order to achieve customer satisfaction and customer loyalty.

To fully understand customers' varying needs and expectations, organizations can adopt some or all of the following methods:

- Customer Opinion / Satisfaction Survey
- Customer Advisory Group
- Focus Group
- Customer Feedback Hotline
- On-line Customer Feedback Website
- Employee Feedback
- Mystery Shopping (also for your competitors)

Based on the findings from these methods, customers can be segmented by:

- Industries / trades
- Age groups / gender
- Purchasing power
- Preferences
- Sales channels
- Service channels

The purposes of customer segmentation include:

- Identification of potential products and services
- Design of pricing strategies
- Determination of profitability
- Targeting of promotion mix
- Assignment of sales / service channels (e.g., salespersons, account managers, retail, internet, telesales, etc.)

Customer segmentation contributes to product / service offerings tailored to meet different customers' needs and expectations, with a resultant higher quality of service experience. Airlines, banks and transportation industries usually offer different levels of service to targeted customer segments. For example, airlines companies offer First Class, Business Class and Economy Class to suit the needs of different customers.



## B. Enhancing Customer Service Experience

Customers' purchasing decisions are frequently driven by rational as well as emotional elements. Customers want to be entertained, stimulated, emotionally and creatively challenged. Therefore, professional service organizations enhance customers' service experience in the moments of truth through:

Sensory	Examples
Seeing	Visual display of posters, pictures, video clips, etc.
Hearing	Broadcast of music in shops
Touching	Product display, touch screen devices for interaction, etc.
Smelling	Perfume, scented flowers, fruits, etc.
Feeling	Colors, lighting, decorations to create different themes

To foster professionalism in organizations, customer service practitioners should be properly empowered. Empowerment is where an organization enables and supports an employee to satisfy customer's needs within the authority given to him/her.

The Service Rule of Nordstrom, the famous department store, is a good illustration of service empowerment.

*Rule #1: Use your good judgment in all situations.  
There will be no additional rules.*

*Please feel free to ask your department manager, store manager or division general manager any question at any time.*

## C. Managing Customer Relationship

Professional organizations build long-term relationships with customers through Customer Relationship Management (CRM). CRM is an approach that integrates strategies, people, processes and technology to maximize the relationship of an organization with its customers. The value of CRM is to retain customers, enhance customer loyalty and ultimately increase profitability through better understanding, tracking and analysis of customers' needs, expectations and life-time values.

Here are some common CRM examples:

- Send a birthday card to customers
- Take photos for diners on special occasions such as birthday
- Special offers / discounts for loyal customers
- Arrange recreational activities such as golfing, yachting for VIP members
- Offer energy-efficient appliances upon investigation of complaint on high electricity consumption

There is often a misconception that organizations need to invest a lot in resources and state-of-the-art technologies to make CRM work. In fact, a customer service professional can manage the customer relationship very well by remembering the customers':

- Names
- Favorite products / services
- Preferences e.g. colors, tastes, etc.
- Purchasing patterns





## Benefits of Customer Service Professionalism

Customer Service Professionalism brings a win-win-win situation to organizations, customers and staff. Some of the benefits are highlighted as follows:

### Organizations

- Enhance customer satisfaction
- Enhance customer loyalty
- Increase revenue
- Win customers' word-of-mouth
- Gain more referrals
- Prevent high staff turnover rate
- Strengthen the workforce and productivity

### Customers

- Easy to do business with
- Consistent, reliable and high-quality service experience
- Peace of mind with trust and confidence
- Dedicated and long-term business relationship

### Staff

- Enhanced marketability
- Better promotion prospects
- Earn respect from customers and colleagues
- Greater job satisfaction and team morale

### Learn the Lesson

Once upon a time, there was a window washer renowned for his quality work. One day, upon cleaning the windows on the highest floor of the International Finance Centre, the worker relaxed and stepped back to admire the excellent job done. However, he forgot that he was high in the air and stepped out of the working platform. Fortunately, he had fastened his safety belt, otherwise, he would have fallen to death.

The morale: **We must not settle just for excellence.**

Therefore, when you think that your organization has delivered excellent service to customers and all staff can relax ... BEWARE!

Professionalism is a never ending journey for all customer service practitioners.

Build and continuously improve your customer service professionalism through E<sup>3</sup>C<sup>3</sup>.