
Customer Experience Proposal

March 23, 2016



Introduction

Professional Training and Occupational Services (PTOS) is an all-inclusive customer development company. With a 8 year track record as the leaders in the Customer Service Development industry - we offer programs and services that will increase customer satisfaction, multiply growth and retention which will result in profits.

We are the game changers in the customer service development industry. Our innovative and multi-sensory approach to workshops and our quality packaged programs allow our clients to have a first world experience of quality service. We aim to improve customer satisfaction scores internally and externally.

We currently operate in Jamaica and the United States and we are International Channel Partners for Service Quality Institute who is dubbed as "The Global Leader of Customer Service" by USA Today.

Our Approach

Mystery Shopping and Customer Satisfaction Surveys

In order to address the underlying challenges that requires Customer Service Intervention - our methodology before intervention comprises of diagnosing the specific areas that need improvement or modification. In order to achieve that result - as Certified Members of the Mystery Shopping Providers Association (MSPA)- we will conduct an extensive Mystery Shopping Exercise on the Customer Experience.

Our systematic approach to measuring your customers emotional and intellectual needs starts with "snapshots" of the way in which customers are engaged by the business. Some of our assessments include: (a) "How long did it take for a customer

to be acknowledged upon entering a branch or department?" (b) "Did the person who answered the telephone state the department and his or her name?"

Our mystery shoppers are diverse - by age, ethnicity, economic background and education. All of our mystery shoppers have to follow the guidelines according to MSPA in addition they are required to conduct at least four to ten face-to-face shops for the month and also a minimum of six telephone shops. There is also a questionnaire that we require they complete and also provide a brief and concise summation of their experience.

The data, that we collect from their evaluations, is used to collate and capture a larger scope of "the experience through the eyes of the customer" - based on the feedback, we also make recommendations accordingly and provide a rating in terms of the areas we believe are high in performance and the areas that require improvement. All organizations offer some level of quality customer service, however, the challenge is to remain consistent all throughout.

Our Mystery Shop Evaluates

- Customer Service Standards
- Product Knowledge
- Adherence to Policies and Procedures
- Employee Integrity
- Wait Time and Processing Time - SPEED
- Employee's ability to connect emotionally and intellectually with each other
- WOW factor!

In addition to the Mystery Shopping, we firmly believe that we should also glean from the customers - why they do business with you and how can the quality of the service be improved. We are able to provide the answers to these questions through a personalized "Customer Satisfaction Survey". This will allow the customers to answer questions anonymously on how the quality of the service can be improved.

We will also be able to measure the Net Promoter Score (NPS) for the using the Customer Satisfaction Survey. The NPS provides a key performance indicator (KPI) that will allow you to measure the overall impact of your customer service channels. Additionally, you will be able to determine the level of customer loyalty that exists amongst your customers. The immediate responsibility of **your company** based on the Net Promoter Score obtained, is to identify and implement measures to improve their customer satisfaction rating in order to drastically increase the NPS is calculated by asking customers - on a scale of 0 to 10 how likely is it that they would recommend **your company** to their friends or family. $NPS = Promoters - Detractors$. **Detractors** are persons who score the organization **0-6**, **passives** are persons who score **7-8** and **promoters** are persons who score **9-10**.

As a result of our initial assessment we would then be able to determine which are the main areas of intervention using our 10 - step Service Culture Plan.

Our Programmes

Leadership Programmes

- **Leading Empowered Teams for Service Quality** - geared towards Business Owners, Senior Managers, Leaders and Supervisors in the business. Programme has four cornerstones - Quality Service Standards | Feedback (How To Catch Someone Doing Something Right and Confronting Non-Performance) | Empowerment | Teamwork
- **Coaching for Success** - geared towards Managers, Supervisors and Leaders as this programme focuses on coaching and mentoring team members to yield the best results for all parties. Our approach in this programme incorporates Emotional Intelligence and helps leaders to look within themselves and also to seek the best in others.

Programmes for All Team Members

- **Feelings Retail Service | Feelings for Professionals** - this programme is for all team members and focuses on the individual. This programme is our most successful globally and loved by all that engage with the content. The programme focuses on Feeling Good About Yourself | Prating Habits of Courtesy and Self Care | Using Caring Communication (Verbal and Non-Verbal) | Listening | Performing | Learning.
- **Empowerment** - this programme is for all team members and focuses on how to engage team members that they will make empowered decisions when faced with a customer challenge.
- **Handling Irate Customers** - this programme is for all team members and focuses on how to manage difficult and challenging situations with customers. Each

experience is different and will require a unique approach even though the same strategies are applied.

- **Speed** - this programme is for all team members and focuses on doing it now, doing it right and doing it fast. Most customers would like to get in and out of a business in the shortest possible time and so SPEED enables your team members to have a SPEED mindset and ensure your systems and technologies support that mindset
- **Moving Up (Career Advancement)** - this programme is for all team members and focuses on advancing yourself as an individual. Each team member may have a dream, desire or want to move up within the organization or move up in their own lives. This programme helps the team members create personal goals and a vision board that will help them grow.
- **Remember Me** - this programme is for all team members and focuses on remembering specific characteristics about your customers such as their name, favorite drink, birthday and any other relevant information that would make them feel valued as your customer. People like to be remembered and feel valued.
- **Loyal for Life** - this programme is geared towards all team members and is focused on service recovery. How to Take a Customer from Hell to Heaven in 60 Seconds or Less. What you say and how you say it will determine how the customer will respond.
- **Service First DVD Library** - this is a DVD Library comprising of 12 DVD's highlighting different customer service topics that are used as reinforcement within branches and/or departments of an organization. Each DVD can be implemented within 15 minutes and comes with online support.
- **Exceptional Service** - this programme is for all team members and focuses on delivering service exceptionally. This programme can also be used as a reinforcement for areas within the organization that need a one day refresher.

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- **Telephone and Workplace Etiquette** - this workshop is geared towards all team members that may interface with their telephone whether mobile or landline and also encompasses the do's and don'ts of how to behave socially and ethically in a workplace environment.
 - **Capture Every Moment (Sales Development Workshop)** - this programme is geared towards all team members that are sales focused and have targets to meet monthly | quarterly | annually. The programme covers the sales process and also the personality types of a seller as well as that of a customer. We have practical exercise that give the sales team an opportunity to practice selling. Our programme is highly focused on building strong relationships and has a very integral component that is geared towards Customer Service.
 - **Team Building Programmes (Indoor and Outdoor)** - we customize and design team building programmes that will highlight the improvement of the deficiencies in your team. Teamwork is challenging at times and understanding personalities and also managing expectations is critical to developing a strong and cohesive team.

Measuring Your ROI as Customer Experience Engagement is Viewed as Intangible

To measure the impact of the learning systems, we suggest you track the following on a monthly, quarterly and annual basis.

1. Defection Rate
2. Customer Count
3. Customer Complaints
4. Customer Satisfaction

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5. Repeat Business
 6. Employee Turnover (a. Actual Number and b. Actual Cost to replace employees)
 7. Customer Service Performance Standards

In order to maximize the results, you must ensure the following:

1. All team members must attend all sessions
2. Top Management Buy in and Participation
3. Align Human Resource policies and procedures with the new culture to ensure accountability
4. A willingness to change the people or change the people

Implementation

Our programmes are implemented as workshops. The workshops are conducted at locations that the clients' choose or at the actual business office. We usually recommend round shaped table set up as this is better able to facilitate an intimate and engaging discussion as well as activities



Company Profile

P.T.O.S. are International Channel Partners for Service Quality Institute (S.Q.I.) located in Minneapolis, Minnesota (U.S.A.). Service Quality Institute is headed by John Tschohl



(President) and Time Magazine named him “Customer Service Guru”. S.Q.I. programs have been changing customer service attitudes and behaviours in cultures and countries all over the world. We have an excellent product called a “Service Culture Plan” that is a 3 to 4 Year program geared at changing the mindset and behavior patterns of the people from top management to team members who have the first point of contact with a customer.

Service Quality Institute (SQI) is a US based company with in excess of 40 years experience in delivering effective Customer Service Development for Managers and Front Line Teams. P.T.O.S. has been operating in Jamaica for in excess of 5 years. We offer coaching and personal development programs that drive the Service Culture for the entire company. Our growth and development programs change attitudes and behaviours, teach customer retention skills and improve employee morale and teamwork.

At P.T.O.S., we seek to increase the profitability of all our clients by equipping, empowering and developing team members to their maximum potential. Our comprehensive services include Customer Service Development Programs, Service Culture Plans, Mystery Shopping, Motivational Presentations and Customer Satisfaction Surveys. We focus on increasing client retention and profitability while providing the tools to track and measure your progress.

In order to meet the individual needs of our clients, P.T.O.S. maintains a wide range of qualifications from distinguished tertiary institutions from the United States of

America, Jamaica and the Caribbean. We have professional experience spanning over 50 years in a variety of industries. Our extensive knowledge base encompasses: International Business, Counseling Psychology, Mass Communication, Public Relations, Customer Service and Human Resource Management. Our associates are distinguished by their functional and technical expertise combined with their hands-on experience, thereby ensuring that our clients receive the most effective and professional service. P.T.O.S. continues to provide benchmarking principles that guide the service industry.

Our customer base ranges from medium to large sized corporations in the Telecommunications, Banking, Retail, Hospitality, Government, Airline and Insurance industries.



www.facebook.com/CustomerServiceJamaica



www.twitter.com/CustomerServJam



Instagram: customerservicegloba

References and Testimonials

Service Culture Plan Client Testimonial

Karl Williams, Vice President of Human Resources, Sagicor Life Jamaica, shared some meaningful feedback:



1. What were your issues and concerns before meeting with P.T.O.S.?

- Strong culture of performance in the company, but lacking service culture
- Team members' lack of understanding of importance of serving the internal customer
- Lack of each team member's understanding about how their role affects the external customer, whether they interact with them directly or not

2. What were you searching for?

- A programme to help develop a service culture in Sagicor
- More than telephone and interpersonal etiquette, which everyone knows
- Something that lasts for several years, since a company's culture cannot be changed in 1 training session, or even 2

3. Why did you choose us?

- P.T.O.S' programmes clearly addressed the service culture issues that we were confronting
- Programmes were complete, i.e., covered all aspects of customer service
- Programmes were diverse in the delivery method
- Programmes lasted for an extended period, with interventions that touch each team member every few months
- Tools are left with us that we can use for refresher/new team members, e.g., DVDs, books, presentations
- Training delivery method helps us to internalize the material, i.e., train-the-trainer by P.T.O.S. then training to all staff by service champions

4. What specific results have you seen so far?

- Team members have started using the language of the programme, which shows that they are starting to retain the knowledge, e.g., “response-able”
- Team members are excited about the training because of the difference of delivery, the thoroughness of the material and the “aha” moments in the training sessions
- Translation to impact on customer service will be seen when we complete our 2012 annual customer satisfaction survey, although any improvement will not be due solely to our service culture programme

5. What does P.T.O.S. and its development programs mean to you now?

- We are really impressed with PTOS’ professionalism and high standards of customer service; they clearly practice what they preach
- Our expectations of a higher standard customer service training programme have been met and even exceeded
- We appreciate the fact that the programmes evolve and we reap the benefits of this, e.g., new programme “Empowerment: A Way of Life” was not in the Service Culture Plan when we started but we are participating in it at no additional cost, except for shipping of materials
- P.T.O.S. is available to give training and service advice, to deliver additional training when necessary, and to participate in internal activities when asked (e.g., team member service culture programme graduation exercises)

Conclusion

We wish to thank you for the opportunity given to us to introduce and present this 3-Year Service Culture Plan and we guarantee that this culture change strategy will add tremendous value to the company's bottom line. Should there be need for further clarifications of the above proposal please do not hesitate to contact the undersigned. We look forward to your patronage.

Yours truly,
Professional Training & Occupational Services Ltd.



Yanique Grant

Managing Director & Lead Facilitator for S.Q.I.

Awarded "Consultant of the Year 2009" and "Most Service Culture Plans Sold 2010" by SQI



Professional Training & Occupational Services, Ltd.