

# Easy Way



***Teach yourself...***

**Respond to customer  
enquiries**

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Written in plain English

*A Cheryl Price Publication*

## Easy Way –Respond to Customer Enquiries

In this book customer enquiries are analysed and responses made by telephone, fax, letter and email. Includes English, grammar and follow-up procedures etc. It contains simple step-by-step exercises to guide you through the learning process.

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Sample Document

## Section

# 1

## Identifying and Analysing Customer Needs and Expectations

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### Learning Outcomes

*At the end of this section you should be able to -*

- ☐ Understand who enquiries will be received from
- ☐ Understand who your customers are
- ☐ Receive enquiries from customers
- ☐ Understand and identify the various needs of customers
- ☐ Accurately and in good time identify and analyse what customers want
- ☐ Clarify unclear points with customers
- ☐ Know where to find organisational requirements on customer enquiries

Sample Document



# Introduction

All organisations will receive enquiries from customers during the course of their operation.

## Customer enquiries

Types of enquiry include:

- requests for information
- appointment-making
- orders for products
- bookings for services
- disputes about invoices
- contract negotiations
- enquiries about rates, etc.



The following table gives some examples of workplaces and organisations, and the types of enquiries that might be received by them.

<b>Offices</b>	In an office, the type of enquiries will vary depending on the type of business and its activities, and will include enquiries about orders, bookings, invoices, payments, marketing, conferences, training, and products and services.
<b>Schools</b>	A school will receive enquiries about pupil records, assessments, syllabus criteria, admission policy, policies and procedures, budgets, etc. Enquiries will come from the Department of Education, local government, parents and salespeople.
<b>Shops</b>	Shops will receive enquiries about opening hours, accounts, payment methods, stock, mail order, invoices, and product information.
<b>Charities</b>	Charities will receive enquiries about media representation, activities, funding, donations, scope of action, volunteer work, and newspaper stories.
<b>Government departments</b>	Government departments will receive enquiries about lobbying, parliamentary debates, constituency activity, legislation, policy, procedure, and consultation documents.

# Who Will Make Enquiries?



Enquiries will be made by ‘customers’. What does the term *customers* mean?

Your customers are *all the people that you deal with during the course of your work*.

Some examples are obvious, for instance,

- A hairdresser’s customers are people who want their hair cut, permed or coloured.
- A dentist’s customers are patients who attend the dental surgery for treatment.
- A supermarket cashier’s customers are shoppers who bring items to the till.
- An animal trainer’s customers are pet owners who bring their pet in for training.

However, these people may have other customers who may not immediately be so obvious, eg

- The hairdresser may have trainees working part-time in the salon while they learn the trade. These trainees are also customers.
- The dentist may liaise with dental organisations or other surgeries to keep abreast of new techniques – these organisations would also be customers.

## Exercise 1

Write a list here of the various types of people that you deal with in your job, for example, they might be fruitmongers, hotel guests, waiting staff, vets, etc – it will depend on your job. If you do not have a job, choose an interesting job to conduct this exercise for.

- 1 .....
- 2 .....
- 3 .....
- 4 .....

## Customers can be internal or external

Customers can be “internal” or “in-house”, which means that they come from within the same organisation as you (eg colleagues in your department or in other departments, branches or regional offices). For example:

- a mailroom worker might spend a lot of time collecting and delivering post within the organisation,
- a chef might work with the kitchen staff and the maitre d’.

Customers can also be “external” or “out-of-house”, which means that they come from outside your organisation. Some employees may have a lot of contact with members of the public who are buying their goods or using their services, for example:

- a supermarket worker,
- a doctor,
- an electrician,
- a waiter or waitress,
- a nurse,
- a hotel doorperson,
- an airline steward/ess.

### Exercise 2

Consider the following workers and tick which group their customers would come from *predominantly*.

	Work Colleagues	Members of the public
Newspaper Editor	<input type="checkbox"/>	<input type="checkbox"/>
Beauty Consultant	<input type="checkbox"/>	<input type="checkbox"/>
Painter and Decorator	<input type="checkbox"/>	<input type="checkbox"/>
Theatre Usher	<input type="checkbox"/>	<input type="checkbox"/>
Tour Guide	<input type="checkbox"/>	<input type="checkbox"/>

### How do customers make contact?

The following are the most common ways that customers, whether internal or external, make contact:

- face-to-face, eg in a shop, a hairdressing salon, a doctor’s surgery, a restaurant
- by telephone, eg a helpline, a call centre, ordering a pizza for home delivery
- in writing by post, email or fax, eg a letter of complaint to an office, a job application, an order request (including from international customers)
- by internal memo, eg in any large organisation whether based in one building or over various locations.

# Handling Enquiries Efficiently

When enquiries are received, it is important that they are handled efficiently.

This means that what the customer wants and what they expect to happen as a result of their enquiry must be identified in *good time, accurately and comprehensively*.

Organisations rely on their clients and customers to stay in business, so communication between all the parties must be efficient or problems could occur which could jeopardise the business's reputation and result in loss of sales. Imagine the following situations.

- A customer faxes an order to a florist asking them to contact her as she would like to order a large bunch of carnations to be sent to her parents for their 30th wedding anniversary – but the florist never contacts the customer.
- A customer writes to a training centre asking for an enrolment form for business management courses – but the form arrives two months later, too late for the customer to enrol on the course she wanted to attend.
- A customer emails a recruitment agency in response to a newspaper advertisement telling them that he has the skills they are looking for and he would like to find temporary work – but he never gets a reply.
- A customer complains to an internet bookseller from which he had ordered a book because the book still hasn't arrived – but he never hears anything back.

If you found yourself in one of the above customer's situations, you would probably assume that the company you were trying to deal with was (a) incompetent, (b) rude, or (c) unreliable. Perhaps all three!

## No second chances

In fact, if we looked at the examples above from the company's point of view, we may find that there were reasons why these problems had occurred. They may have been 'one-off' errors and the customer was just unfortunate to be the one to have a bad experience.

- For example, the florist who normally reads the faxes and phones customers back to finalise orders may have gone for a tea break. Faxes that arrived while s/he was gone may have been accidentally put in the bin.
- Or the training centre may have received the letter but, because it was addressed to someone who had left the organisation, it may have hung around in the office for weeks until finally being delivered to the correct person.

However, the customer would not have known that the business had experienced unexpected difficulties, so s/he would just think that the organisation was very inefficient. The customer would be very unlikely to give the company a second chance to prove itself and would instead take his or her custom to a competitor.

If many customers experienced bad service, the company's customer base would dwindle and, in the long term, the company would find itself going out of business.

This is a good example of why it is important to have enquiry management procedures for every eventuality (including the problem situations that occurred above), together with capable staff who know the procedures inside out and can implement them effectively.

### Exercise 3

Imagine you work in a large motel and regularly take bookings from customers in New Zealand and overseas. You deal with all booking enquiries and process all transactions.

List four different types of enquiries you might receive from potential customers.

- a .....
- b .....
- c .....
- d .....

### Exercise 4

Give examples of the type of enquiries the following organisations might expect to receive.

*Restaurant*

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*Doctor's surgery*

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*Dress-maker*

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*Cake manufacturing company*

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# Identifying and Analysing Customer Needs and Expectations

Customers will have all sorts of enquiries or problems that they need your help with. For example,

- A carpenter may email a cabinetmaker to see if there is any work available, or
- A customer could fax a building company with a request for information on approved plumbers and electricians, or
- A customer could write in to an electronic appliance repair centre with a complaint regarding a repair.

They may need information or practical help from you. You need to be prepared so that you can quickly and accurately find out what customers want and then respond in the best way possible.

You must first identify what the customer's enquiry is (eg a complaint, a request for information, etc) and then analyse the enquiry to decide what it is they want you to do about it (for example if the enquiry is a complaint, they may want compensation or they may just want you to record their dissatisfaction to avoid it happening again).

Customers' needs and expectations will fall into four main categories:

**Problem-solving** – the customer wants an answer to a problem or query. Primarily this will involve the provision of information or perhaps the demonstration of a service.

**Multiple linked needs** – many related questions entailing possibly quite a complex solution and response. You and your organisation may be able to deal with some parts of the enquiry but not all.

**Complaint resolution** – the customer is dissatisfied with the product or service that your organisation has provided and wants some action taken (this can take many forms, from a refund or replacement to a simple apology).

Enquiries **outside the usual range** of goods and/or service provision – the customer has asked a question which is outside the remit or expertise of the organisation. It is likely that you will have to refer these customers to another department or another organisation altogether.

## Example

Extract of a letter to a garden centre.

'I have a very small garden and love colourful plants, many of which I have recently bought from your centre. I am now thinking ahead to the spring and wondering what is going to be in fashion then.'

The customer needs and expects:

Information on products and trends.

To respond you may be able to send a leaflet, brochure or catalogue.

### Exercise 5

Here are some extracts from letters making enquiries. Using the four categories given on page 6, write down how you would classify the query and what you think the customer wants in response.

#### Extract of query faxed through to a gourmet foods importer.

Last week I bought some of your 'After-Dinner Choco-Mints' to serve to my guests at a dinner party. However, on bringing them out yesterday evening I noticed to my horror that they were three months past their sell-by date.

The customer needs and expects:

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#### Extract of query sent to car mechanic/trader.

The customer needs and expects:

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I have a fairly battered old car and need to get the brakes repaired. I am also interested in upgrading if the car model and price are right. However, I would need to buy on finance and would be looking to get a good deal on insurance too (perhaps with house and contents insurance included). Furthermore, my partner needs two new tyres ordering.

#### Extract of query faxed through to a restaurant.

You are my favourite local restaurant and my fiancé and I have spent many happy evenings at your establishment. I therefore wondered if you would be able to do the catering for our wedding in three months' time? I know that this isn't in your normal range of services offered.

The customer needs and expects: .....

.....

.....

## Timeliness

Timely processing of enquiries means that they must be accepted into the organisation, registered, checked that all the necessary information is present and correct, sorted and answered or passed to the correct person – all within an appropriate timescale. Processing enquiries correctly in this way ensures that the movement of enquiries can be tracked through an organisation, which reduces the chance of lost mail and disputes about whether or when items were received.

Rapid preparation and despatch of responses to enquiries will promote a favourable image with other organisations and the public.

If customers consistently experience delays in getting a response to their enquiries (be it fax, letter or email), they will learn not to rely on the organisation and to distrust it. This will have a very negative impact on customer relations and customer satisfaction.

### Exercise 6

Choose an organisation and give an example of a transaction that might take place by mail. Explain the negative consequences that could occur if the enquiry was not responded to promptly (or at all).

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### Exercise 7

If you received all of the following items one morning, write down the order of priority in which you would attend to them.

- A** Letter addressed 'To whom it may concern' regarding 'A fantastic business opportunity – ring for details'.
- B** Letter that says a cheque is attached, but no cheque is included.
- C** Email from your best friend.
- D** Email from customer who wants goods posted to them but hasn't included their address.
- E** Package from client saying that samples of goods are being returned and are enclosed, but no samples are enclosed.

Order of Priority:

\_\_\_\_\_



## ***Receiving enquiries by post***

To ensure timeliness in answering enquiries, mail should be sorted and any items marked 'Urgent', or sent by a special mail technique, should be separated out. This includes mail received through special delivery, courier, registered mail or marked 'by hand' or 'immediate'.

Priority should be given to these urgent items. There is a good reason that someone has sent them in this way, so it is important that they receive prompt attention. Such items may not arrive with the general mail, they may arrive later in the day and be delivered direct to reception. Special procedures may be needed to receive, record and acknowledge documents, such as tender documents, which have specific time limits.

## ***Receiving enquiries by telephone***

For many businesses, the telephone is the major method of communication they have with their customers. It is also a very important marketing and promotional tool. The image projected over the telephone will provide the customer with their impression of the business.

Workers who may use the telephone a lot at work include

- Call centre workers,
- Helpline support staff,
- Researchers,
- Lawyers,
- Taxi company managers, etc.



### ***Understand the phone system***

Everyone who answers incoming calls must know the essential components of the telephone system in use. Incompetence on the telephone may reflect unfavourably on the business. Do not wait until you have a customer on the line before attempting for the first time to transfer a call or put a caller on hold. Try these manoeuvres out *before* going live.

### ***Answering the call***

Your workplace may have requirements that are laid down for telephone answering. These requirements may include how quickly the phone should be answered and what you should say when you answer the phone.

### ***Good telephone answering technique***

- ✓ Answer the telephone promptly - always before the third ring. Leaving a phone to ring will irritate your co-workers and will give the caller the impression that his/her call is not important to your company.
- ✓ Answer the telephone as if you are face-to-face with the caller. If you are in a bad mood this must not be apparent to your caller.
- ✓ Greet the caller. Say "Good Morning" or "Good Afternoon" first, because often the first words you say are not heard clearly.
- ✓ State the name of your company or your department clearly.
- ✓ State your name.
- ✓ Offer to help, for example "How may I help you?"



## Know your deadlines

Even if you haven't been given a deadline, ask for one. This will save you having to rush later, when your supervisor panics because he or she needs the task to be done straight away. If your supervisor doesn't give you a deadline, but just says "As soon as possible", you can give yourself an idea of the real deadline by asking what the work is for.

### **Keyword: Deadline**

A deadline is the point in time by which something must be completed. For instance, if you are planning a meeting for 20 November, then your deadline for sending the agenda out might be 1 November.

### **For example**

*Supervisor:* "Please would you photocopy these handouts?"

*Sally:* "Certainly, when would you like this to be done for?"

*Supervisor:* "Oh, whenever you get ten minutes."

*Sally:* "Do you need them for Wednesday's Sales Meeting?"

*Supervisor:* "Yes, and they need to be distributed by tomorrow."

*Sally:* "Okay, I'll get them to you by lunchtime."

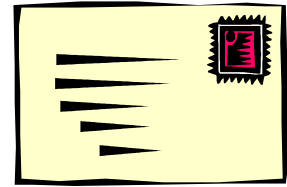
If your deadline is another day, then make a note of it in your diary. There are likely to be more deadlines for other jobs, and there is no point trying to keep them all in your head.

Prioritising involves *managing* your workload appropriately.

- 1 Identify what customers need from you and by when. Will you need to get information from someone else on a customer's behalf (this may delay you in responding)? Is a request urgent? When do your organisation's rules and procedures state that such tasks should be completed by?
- 2 Estimate how long a task might take. When do the customers want replies? What other tasks do you already have to do? Which have been waiting the longest to be actioned? Which have the most imminent deadlines?

## Accuracy and coverage

Have you ever listened attentively to an enquiry, nodded politely, and then gone away wondering what on earth you were being asked to do? It is easy to fall into this trap. Nobody wants to look stupid. However, you'll look more silly later if you fail to answer the question you were asked – either at all or in full.



A half-answered question causes delay and frustration for the customer which may be sufficient to feel that they will now take their business to one of your competitor organisations.

Similarly, if you give a customer an answer to a different question to that which they actually asked – it wastes both your time, and could lose your organisation business.

### Example

**Customer:** “I have a leaking roof. What would be the best thing to do?”

**Builder:** “Leaky windows can often be resolved by new frames being fitted.”

**Customer:** “That’s all very well, but it’s the roof that leaks.”

### ***Understand what you are being asked***

If you don’t fully understand what you’ve been asked, then ask for clarification. If the instruction is vague or unclear, then rephrase it in your own words to check that you understand.

### Example

**Customer:** “My house has a terrible leak problem. What would be the best thing to do?”

**Builder:** “Thank you for your enquiry. Can you first give me some more information – where exactly are the leaks occurring?”

In the example above, the customer gave the builder some very vague information. The builder managed to clarify what s/he was being told by asking a simple question, in order to get further details from the customer.

### ***Remember the details – be accurate***

Another common problem with enquiries is that the details are easy to forget.

*When you are asked something, write it down. If the enquiry is on paper already, then ensure that you keep it safe. If appropriate or necessary, transfer the information into the organisation’s computer system.*

Don’t rely on your memory. Even if you remember most of what you have been told, there is a good chance you will forget some of the details.

You should make a note of:

- 1 What you have been asked to do.
- 2 Any special instructions or details you have been given.
- 3 How to find out the answer (if you didn't already know) or who the query should be referred to.
- 4 When the enquiry must be responded to by (the deadline).

#### Exercise 8

What does the word *deadline* mean?

.....

How can you help ensure you meet your deadlines?

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#### Exercise 9

Imagine that you start a new job in a workplace that takes a haphazard approach to handling incoming enquiries. Summarise your views for your manager on the importance of establishing and implementing a formal management policy and procedures.

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### Exercise 10

Imagine you are the head waiter at a restaurant and received the following enquiry:

*“I would like to book a table for 16 for next month. Also I run a painting and decorating business and wondered if you would like your external paintwork painted?”*

As the head waiter, you can book the table but don't have the authority to organise to have the redecoration done. Therefore you write back in the following terms:

*“Thank you for your enquiry. I can confirm that I have booked the window table for 16 for 18 September. I hope you enjoy your meal and look forward to seeing you then”.*

Would this be an acceptable response? Explain your answer

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#### ***Our answer***

Our view is that it is not an acceptable response. Although as the head waiter you do not know what response can be given to the second query, you should not just ignore it. You must ensure that it is referred to the appropriate person (in this case, either the restaurant manager or owner) and that the customer is kept informed of what is happening in response to their query. You should either inform the customer who their enquiry has been referred to with their contact details so that the customer can make contact personally if they wish, or alternatively follow up the query yourself and provide the customer with the answer, with the appropriate person's contact details in case they need more information or want to follow up.

# Clarification of Unclear Enquiries

You should make a note of any enquiries where information needed to respond to the enquiry has been omitted. For example, a customer may order goods via email but forget to include their physical address for the goods to be posted to them. These clients should be contacted immediately to get the missing information so that their enquiry can be processed with minimum delay.

The rules:

- Be prompt
- Be clear
- Give different options to contact you
- If there is a problem, say so.

## Clarifying unclear enquiries by letter

Clarifying queries by letter is a useful method to use because:

- Brochures and other explanatory documents can be sent with the letter.
- Legal documents which require signatures can be sent through the post.
- Documents can be formatted and presented effectively and attractively.
- You have time to think about what you want to say before committing it to paper.
- Parcels and packages of samples, products etc can be posted.

## Clarifying unclear enquiries by email

Email allows a user to send messages and documents to other users on the Internet.

Clarifying queries by email is a useful method to use because:

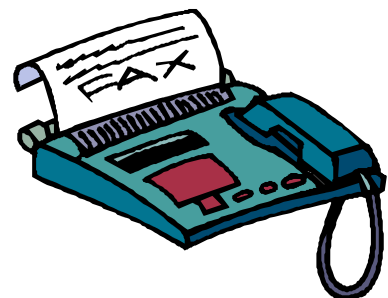
- It is fast, convenient and cheap.
- Messages can be sent to multiple recipients at the same time.
- A reply can be sent back almost immediately by the recipient.
- Users do not have to be in front of a computer – emails can now be sent from cellphones.
- Files can be attached and sent with the message.
- A Read Receipt can alert the sender to the fact that the message has been delivered and read.

## Clarifying unclear enquiries by fax

Faxes can transmit paper information, almost instantly, to other people.

Clarifying queries by fax is a useful method to use because:


- They are very quick and convenient to send.
- They can be quickly produced, eg they can be handwritten rather than typed if necessary.
- They can be sent internationally instantly.
- Graphics or something which is not available electronically (and therefore can't be sent by email), eg the page of a book, a proof from a printer etc, can be faxed.



### Exercise 11

Imagine you received the following query.

Answer the questions on the next page regarding this letter.

<p><b>Kukulski Designs Ltd</b> 9 Bould Street Wellington Phone 04 733 9393 Fax 04 733 0228</p> <p>8 September 2011</p> <p>The Manager CRX Telephone Networks PO Box 13733 Wellington</p> <p>Dear Sir or Madam</p> <p><b>Installation of telephone system</b></p> <p>Our organisation needs a new telephone system. Could you please provide a quote. We are a medium size firm and there is an element of urgency as we are taking on new staff and growing very rapidly. If you cannot install the equipment before the new staff are recruited it will cause us a lot of problems.</p> <p>I look forward to receiving the quote.</p> <p>Yours sincerely</p> <p>Stefan</p> <p>Stefan Kukulski</p>	
--	---

1 What information is missing that you will need clarification on?

.....

.....

.....

2 How would you contact the writer of the letter?

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3 On a separate sheet, draft a clarifying document using your chosen format.

### Exercise 12

Write down two examples of queries which could be satisfactorily clarified by sending a fax. One example has been done for you as an example.

**Example:** A company faxes a printers asking for prices for printing 'deluxe' brochures. The printer faxes back examples of various brochures to see which are closest to what the company had in mind, before quoting a price.

1 .....

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2 .....

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Now write down two examples of queries which could be satisfactorily clarified by sending an email.

1 .....

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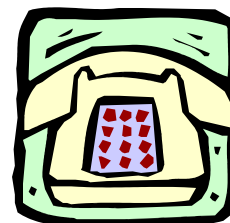
2 .....

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## Clarifying unclear enquiries by telephone

For many businesses, the telephone is the major method of communication they have with their customers.



### Clarifying queries by telephone is a useful method to use because:

- You can get an immediate response from the person you are speaking to.
- You can discuss and clarify any uncertainties immediately.
- Cellphone coverage means that people can be contacted almost anywhere.
- Internet telephone directories and company websites make it quick and easy to find telephone numbers.


## Making a telephone call

- 1 Check the phone number before calling. Wrong numbers waste time, cost money, and are annoying for the person you have called in error.
- 2 Decide beforehand what you have to say. Jot down a few notes. If you need to refer to any information (schedules, etc) make sure this is handy and you don't have to waste time going to find it while on the call.
- 3 When the telephone is answered, greet the person and introduce yourself clearly. State the purpose of your call, eg 'Good morning, this is Hilary Brown speaking. Could you please tell me when your next word processing course will be held?'
- 4 Avoid distractions and interruptions while making the call, eg make sure a printer is not creating a lot of background noise, or that the door to the staff canteen is not open, etc.
- 5 Remember to thank the call-taker for his/her time. Tell them you appreciate their assistance.



### Exercise 13

If you do not have access to one already, design a telephone note pad below which helps ensure that all important information is recorded during a telephone call.

<p><i>Telephone message pad</i></p> 
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# Organisational Requirements for Handling Enquiries

The chances are that an organisation has requirements about how enquiries should be handled. Requirements are *rules and standards* that the organisation has laid down to tell staff how to behave in certain situations. Workplaces often have requirements about other matters too, such as how to dress, etc.

Workplaces have these requirements to ensure that all incoming enquiries are treated in an appropriate, consistent and efficient way, regardless of how they come into the organisation. The rules give employees a framework so that they know what is expected of them – both by the organisation itself and by customers.

Regarding **enquiries**, an organisation's requirements may cover such matters as:

- Who is authorised to open mail
- The time of day by which postal mail must have been opened, sorted and distributed
- The manner in which enquiries are recorded in company records
- Correct procedures for handling enquiries marked 'Private and Confidential'
- Who is to receive enquiries addressed to a staff member who has left the organisation
- What company policy is on refunds and returns

## Example

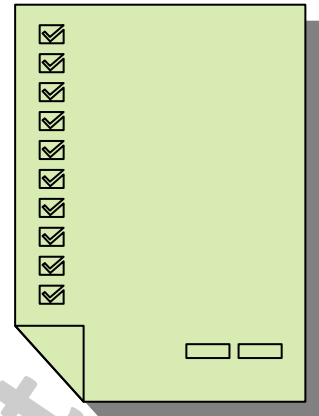
The rules regarding *courier packages* may be: 'Anyone can sign for a courier package. Receipt of packages must be noted in the Incoming Mail Register. The person to whom the package is addressed must be advised within 15 minutes that a package has arrived for them and told where they can collect it from'.

The rule regarding *faxes marked 'Private and Confidential'* might be: 'Any fax marked *Private and confidential* must be placed in an envelope and delivered by hand to the addressee within five minutes'.

## Where to find information on your organisation's requirements

Requirements could be contained in any of the following:

- Quality assurance manual
- Job description
- Employment contract
- Workplace manual or guide
- Records management policy
- Statements of objectives
- Recommended Procedures Guide
- Pricing and discount policy documentation
- Health and safety procedures
- Intranet



Alternatively, you could ask your supervisor or manager for information.

### Exercise 14

If you have a job, ask your supervisor to help you find the requirements on handling enquiries, if there are any, and bear them in mind when you are reading the next sections of this Workbook. Write down here which documents contain relevant information.

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