YOURCXC

FIX THE SERVICE.
KEEP THE CUSTOMER.

A BLUNT, PRACTICAL TOOLKIT TO TRANSFORM SUPPORT INTO RETENTION.

WHAT'S INSIDE THE TOOLKIT?

Customer Service Standards Handbook	Define tone of voice, resolution guidelines, and service values across channels.
Customer Interaction Script Builder	Build scripts for greetings, FAQs, complaint handling, and escalation pathways.
First Contact Resolution Checklist	Improve efficiency by resolving issues on the first touchpoint.
Service Recovery Framework	Turn mistakes into loyalty wins with clear recovery protocols.
Customer Service Scorecard Template	Track response times, satisfaction scores, and team performance metrics.
Agent Training & Coaching Plan	Develop team skills through structured onboarding and ongoing coaching.

WHO IS THIS FOR?

- Customer service managers building high-performing teams
- CX leaders enhancing frontline consistency and responsiveness
- Business owners aiming to reduce churn and boost loyalty
- Coaches and consultants supporting service-driven brands

WHAT YOU'LL BE ABLE TO DO

- Define a clear service standard for your brand
- Reduce complaints and improve customer satisfaction
- Create ready-to-use scripts that maintain quality at scale
- Improve agent confidence and consistency
- Track service performance and drive continuous improvement

CUSTOMER SERVICE STANDARDS HANDBOOK

1. TONE OF VOICE & BRAND PERSONALITY

- [ ] Use friendly, respectful language that reflects our brand values.
- [ ] Avoid jargon and keep communication clear, concise, and empathetic.
- [ ] Adapt tone based on customer emotion: calm for complaints, upbeat for general queries.

2. RESPONSE TIMES & AVAILABILITY

- [ ] Acknowledge all customer emails and tickets within 2 hours.
- [ ] Resolve general inquiries within 24 hours; urgent issues within 4 hours.
- [ ] Live chat must respond within 60 seconds during active hours.

3. SERVICE RESOLUTION & OWNERSHIP

- [ ] Take full ownership of each issue until resolution, even when escalating.
- [ ] Follow through on promised actions, and keep the customer updated.
- [ ] Always close the loop with a confirmation message or resolution summary.

4. ESCALATION & COMPLAINT HANDLING

- [ ] Treat all complaints as opportunities to rebuild trust.
- [ ] Escalate issues based on defined thresholds (e.g. repeat complaint, legal threat).
- [ ] Use the Service Recovery Framework to resolve complaints quickly and fairly.

5. EMPATHY & HUMAN CONNECTION

- [ ] Always acknowledge the customer's feelings before providing a solution.
- [ ] Use the customer's name and personalise responses with relevant context.
- [ ] Avoid robotic or overly templated language – aim for real conversation.

6. MULTI-CHANNEL CONSISTENCY

- [ ] Ensure consistent tone and information across email, chat, phone, and social.
- [ ] Maintain brand voice even when adapting to the norms of each platform.
- [ ] Document responses in the CRM to enable seamless cross-channel support.

CUSTOMER INTERACTION SCRIPT BUILDER

1. GREETING SCRIPTS

- [ ] Email/Chat: "Hi [Customer Name], thanks for getting in touch! I'm happy to help you today."
- [ ] Phone: "Good [morning/afternoon], you're speaking with [Agent Name] from [Company]. How can I assist you today?"

2. COMMON QUERY RESPONSES

- [ ] Delivery Status: "Your order was shipped on [Date] and is expected to arrive by [Date]. You can track it here: [Link]."
- [ ] Refund Request: "I've processed your refund, and the amount should appear in your account within 3–5 business days."

3. APOLOGY & SERVICE RECOVERY

- [ ] "I'm really sorry to hear about this experience, [Customer Name]. I completely understand your frustration and I'd like to make this right."
- [ ] "Here's what I can do to resolve this quickly for you..."

4. ESCALATION HANDLING

- [ ] "To make sure this is fully addressed, I'll escalate this to our [Team/Specialist]. I'll personally follow up and ensure you receive a response within [Timeframe]."
- [ ] "Let me loop in my colleague who's best placed to help further with this."

5. FOLLOW-UP & CLOSURE

- [ ] "Just checking in to see if everything has been resolved to your satisfaction."
- [ ] "Thanks for reaching out, [Customer Name]. If there's anything else you need, we're just a message away."

6. EMPATHY PHRASES FOR PERSONALISATION

- [ ] "I understand how important this is to you."
- [ ] "That must have been frustrating – let's sort this out together."
- [ ] "Thank you for your patience while we work through this."

FIRST CONTACT RESOLUTION CHECKLIST

1. INITIAL ASSESSMENT

- [ ] Greeted the customer warmly and confirmed their name
- [ ] Listened actively to understand the full nature of the issue
- [ ] Asked clarifying questions where necessary

2. ISSUE VERIFICATION

- [ ] Verified customer details and account/order information
- [ ] Checked CRM or ticket history for similar past issues
- [ ] Confirmed issue type and urgency level

3. USE OF TOOLS & RESOURCES

- [ ] Checked internal knowledge base or help centre for resolution steps
- [ ] Applied relevant SOP or policy guidelines
- [ ] Verified solution is within scope of agent authority

4. COMMUNICATION & EXECUTION

- [ ] Explained the resolution clearly to the customer
- [ ] Performed the necessary actions while on the call or chat
- [ ] Confirmed the issue is resolved to the customer's satisfaction

5. ESCALATION IF NEEDED

- [ ] Identified if escalation is required (e.g. technical, financial, legal)
- [ ] Explained next steps to the customer and set response expectations
- [ ] Logged full notes and transferred with context if escalating

6. CLOSING THE INTERACTION

- [ ] Asked the customer if there's anything else they need
- [ ] Thanked the customer for their time and provided a positive closing message
- [ ] Updated CRM/ticket with resolution notes and outcome

SERVICE RECOVERY FRAMEWORK

STEP 1: ACKNOWLEDGE & EMPATHISE

Genuinely acknowledge the customer's concern without defensiveness.

Use empathetic phrases such as:
"I understand how frustrating this must be."

Let the customer fully explain their experience before jumping to solutions.

STEP 2: APOLOGISE SINCERELY

Take ownership of the experience, regardless of who is at fault.

Example: "I'm really sorry this happened, and I appreciate you bringing it to our attention."

STEP 3: INVESTIGATE QUICKLY

Gather relevant details from the customer, system, and internal teams.

Set a timeframe and communicate when they can expect a resolution.

STEP 4: OFFER RESOLUTION OPTIONS

Present practical solutions or alternatives that are within your authority.

If appropriate, offer goodwill gestures (discount, refund, upgrade, etc.).

Confirm the customer is happy with the chosen resolution.

STEP 5: TAKE ACTION & FOLLOW THROUGH

Execute the resolution swiftly and double-check accuracy.

Follow up with the customer to confirm satisfaction and share any next steps.

STEP 6: LEARN & IMPROVE

Log the issue and resolution details for internal review.

Share lessons learned with the team and adjust processes if needed.

Always aim to leave the customer feeling heard, respected, and supported. Great service recovery isn't just about fixing the issue—it's about restoring trust and building long-term loyalty.

CUSTOMER SERVICE SCORECARD TEMPLATE

Each category below should be rated on a scale of 1–5 (1 = Poor, 5 = Excellent). Add comments to provide context or action items.

CATEGORY	SCORE (1–5)	NOTES/COMMENTS
Greeting & First Impressions		
Product/Service Knowledge		
Issue Resolution Efficiency		
Empathy & Tone		
First Contact Resolution		
Customer Satisfaction (CSAT)		
Team Collaboration		
System Usage/CRM Accuracy		
OVERALL SCORE & SUMMARY	Total Score: _______ / 40	Top Strengths:
		Improvement Areas:
	Average Score:	Action Plan:

AGENT TRAINING & COACHING PLAN

1. TRAINING OBJECTIVES

- Build product/service knowledge and troubleshooting ability.
- Develop communication and active listening skills.
- Improve performance in key metrics like CSAT, FCR, and resolution time.

2. CORE TRAINING MODULES

- Onboarding & Systems Orientation
- Handling Difficult Conversations
- Customer Service Standards & Values
- Escalation Management
- Product/Service Training
- Soft Skills & Empathy Building

3. COACHING STRUCTURE

- Weekly 1:1 feedback sessions (30 minutes)
- Monthly scorecard reviews
- Call/chat quality evaluations (2–3 per agent per week)
- Real-time coaching using live interactions

4. PROGRESS TRACKING

- Maintain a training log with dates, modules completed, and trainer notes.
- Use performance scorecards to measure improvement.
- Document coaching goals and progress quarterly.

5. PERSONALISED DEVELOPMENT PLAN

Key strengths to build on:

Key development areas:

Next steps and actions:

Support needed from team lead:

This plan should be used collaboratively between the agent and supervisor, creating a safe space for improvement, confidence-building, and long-term success.

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GROW THE REVENUE.

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