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# Exceptional Service

Customer Experience, Self Service and the Human Interaction

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WRITTEN BY Lior Arussy

EDITED BY David Spindel, Rachel Yurowitz



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US Office: 365 West Passaic Street, Suite 255, Rochelle Park, NJ 07662, USA

Europe Office: No.1 Farnham Road, Guildford, Surrey GU2 4RG, England

[www.Strativity.com](http://www.Strativity.com) [info@Strativity.com](mailto:info@Strativity.com)

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# Customer Experience, Self Service and the Human Interaction



Customer experience and customer strategy management have become the hottest topics on corporate agendas over the last few years. Recognizing that the customer experience is one of the primary drivers for top and bottom line growth has led companies to enlist a growing number of internal and external professionals to help them improve their customer experiences. Moreover, companies recognize that customers are increasingly becoming more discerning and demanding in their choice of vendors. If they want to be the customer's vendor of choice, they need to deliver even better experiences if they are to thrive or even survive.

Despite the importance the customer experience has on many corporate agendas, the state of customer experiences in many, if not most, organizations remains poor. For all the talk about customer focus and concern for customers, many companies do not demonstrate real caring for those people who actually keep them in business. Many seem intent on delivering less value (owing mainly to cost pressures) while their customers increasingly demand more value, personalization and overall concern for their total satisfaction.

At the same time that customers are seeking higher levels of personal service, companies across a wide variety of industries have been steadily introducing and bolstering self-service interaction media to replace or minimize traditional human interactions such as customer service functions. Self-service media seem to be everywhere these days from airport check-in terminals at airports and ATMs in banks to digital tailoring and custom fitting kiosks at retailers.

How then can companies balance these two seemingly diametrically opposed trends of delivering less personalized service while customers demand more? Is it wishful thinking to believe that companies can meet these demands while traditional customer service functions slowly fade into the background?

Before we answer these questions, let's examine the different trends leading to this chasm between corporate and customer needs. What will emerge from this examination is a new role and level of importance both for self service media and customer service functions. It is critical to recognize that as customer demands and expectations for service evolve, companies will have to adapt their service delivery accordingly.



## ~ Optimizing Processes ~

In their book *No Service is the Best Service* (Jossey-Bass, 2008), Bill Price and David Jaffe describe a world in which all processes are optimized. In this world all cross-functional dysfunctions are resolved, and customers are able to serve themselves at their leisure from any web-browser at their fingertips.

While many undoubtedly dismiss Mr. Price's argument for a customer-service free world, what is clear is that the trend towards process optimization seems to be eliminating the need for a number of traditional customer service functions. This reduces the need for human interaction such as live customer service and sales assistance for rudimentary issues.

## ~ Multi-Channel Access ~

Communication with customers continues to grow in a number of channels. Companies now conduct their communication through web sites, facebook presence, YouTube, mobile phones and a growing number of alternate channels. This multi channel access increases the complexity companies need to manage in order to delight their customers.

## ~ Competition in Context ~

Many companies operate under the erroneous assumption that they compete only with their direct competitors. Today's customers increasingly compare all vendors with which they do business to others from any and all industries. All companies today compete against the best in the world such as Disney, Ritz Carlton and Singapore Airlines – true customer experience

vanguards! This new competitive environment creates additional pressure to exceed expectations and measure up to true customer centric organizations. Companies can no longer escape customer demands merely because their industry competition is mediocre.

### ~ In Search of Personalization ~

In its annual Customer Experience Management study, Strativity Group asked executives to list their customers' primary demands. The study found that above all, customers demand the delivery of personalized value (through product and service personalization).<sup>1</sup> Unfortunately, too many organizations fail to recognize this trend and opt to employ a one size fits all business strategy that only alienates a large number of customers.

### ~ Customer Impatience and Inflexibility ~

Time has also become a critical component in the customer experience design and delivery. Customers expect experiences to be of the highest quality but delivered in a timely manner. They are no longer willing to wait to receive their desired experience. This is especially relevant for the new and younger generation of customers who are accustomed to fast internet response time. Patience is limited and impatience seems to head the charts. We live in a time of now or never.

1 Strativity Group Annual CEM Study, March 2008

## ~ Emotional Engagement Matters ~

A study of credit card consumers conducted by the Gallup Group found that both rationally satisfied and rationally unsatisfied customers charged the same amount of money on their credit cards.<sup>2</sup> However, emotionally satisfied customers were found to have charged almost double than that charged by both rationally satisfied and rationally unsatisfied customers.

Emotional engagement is playing a greater role as customers become cynical and skeptical about their vendors' authenticity and true intentions. Companies need to increase their humanity and authentic engagement to counter these challenges. Emotional connections are often established through human interactions at customer-facing touch points such as retail stores, sales meetings and customer service interactions.

## ~ Differentiation – Now More than Ever ~

At the same time that customers are increasingly opting for self service channels, companies are struggling to differentiate themselves from their competitors. In an increasingly web-dominated world, competitors are perceived to be only marginally different from each other and are all the same size – that of the user's computer monitor. Prospects and customers alike can "leave" any vendor's "store" and "shop around" from the comfort of their homes, offices, coffee shops or airport lounges with the click of a button. Customers who serve themselves through self service media will find little reason to remain with a company without competitive differentiation.

2 Harvard Business Review: *Manage Your Human Sigma*, July-August 2005

## ~ The Need for Rapid Innovation ~

The life span of products and services is increasingly shrinking, limiting the period of time in which these products and services can drive revenue and profit. The proliferation of private-label alternatives, web retailers, and shorter product release cycles only accelerates the commoditization of products and services. Companies must develop a robust customer experience innovation engine that exceeds traditional forms of product innovation employed by research and development personnel. Every aspect of an organization's business should be subject to ongoing innovation and improvement from products and services to business models, supporting services and policies and procedures.

## ~ Rethinking the Human Interaction ~

In a world where customers increasingly utilize self service, a human interaction represents a different need. In a sense, customers have already conducted the first tier of service on their own. When they conduct a human interaction they seek to get tier two service – in essence, someone with the ability to solve out of the box problems. They seek to assert their individuality by seeking a unique resolution to their problem.

Organizations must recognize that by developing extensive self service options, they are in a sense outsourcing their first tier of service to their customers. Therefore, when customers reach out to a customer service person, they do not expect someone who will simply repeat the company policy. They already reviewed the policy through the self service channel. After acting as their own first tier of support, customers expect vendors to provide appropriate second tier support immediately.

This evolved expectation changes the whole premise of human interaction. Employees are no longer there to merely answer questions, those questions were answered during the self service session. They are there to solve the problem. The customer expects an out of the box solution from an out of the box empowered employee.

With the advent of self service, a new implied contract was put in place between the company and the customer. Vendors provided self-service vehicles (web, IVR, etc.) as their side of the “contract.” The implication: I will provide you with the tools you need to do this on your own. Customers agreed to use them – but with the caveat that when this vehicle did not resolve their challenge, the vendor would be there for them, and they would be treated as unique individuals – their side of the “contract.” It seems that only one side of the contract has been delivered – the side controlled by the company. The customer side has been ignored.

In order to integrate the customer expectation into the way they deliver service, companies need to rethink the role and function of human interactions in areas such as customer service, sales and retail. Companies must first recognize that these entities no longer serve the traditional role of simply speaking to customers or providing basic service levels. They now act in a new role of providing differentiation through dealing with exceptions, delivering exceptional service and building emotional engagement.

The human interaction in general, and customer service in particular, are evolving into the role of competitive differentiator when all else is equal in an increasingly self service world.

## ~ Defining the Center of Exceptions ~

Due to the fact that customers are solving problems on their own through self service channels, they will contact customer service when they seek a unique resolution to their unique problem. They are testing their relationship with the organization. What is the test? Customers want to see if they will be treated as an individual or a “one size fits all”. Welcome to the center of exceptions!

The center of exceptions is geared to providing customers with the sense of uniqueness, individualism and caring for their one of a kind problem. It possesses the capability to solve “out of the box” complicated issues at the first point of contact by the first person they speak to. Its staff is informed and empowered to solve the problems and can adapt the rules to delight customers.

In a center of exceptions the guiding principle is that every request is recognized as unique and is treated as such – to allow for immediate resolution. All human interactions should incorporate this principle so that employees are willing and capable of delivering on the promise of delivering a personalized customer experience.

Moreover, the center of exceptions needs to recognize that human interactions offer customers (and the company) unique value that cannot be generated through self-service media. Such interactions have the capability of exceeding customer expectations while delivering a compassionate and caring touch. The litmus test for success is whether service personnel were able to surprise customers by exceeding their expectations.

The characteristics for successful centers of exceptions include the following:

- Every interaction is recognized as different and requires unique resolution
- Any interaction that is cannot be resolved through self service is seen as an exception and is treated accordingly
- Employees are empowered and are expected to solve any issue without the need for escalation
- Resolution is always personalized for the customer
- Employees ensure that each experience is exceptional by consistently demonstrating knowledge, urgency and caring during every customer interaction
- Unique customer requests and challenges represent an opportunity for innovation
- Primary objectives should be to surprise and please customers during every interaction

During live customer interactions, companies are able to highlight competitive differentiators through the quality and service they provide. A center of exceptions should consistently demonstrate to customers its ability to address exceptions, resolve unique issues and combine them with emotionally engaging service.





# Principles for Designing a Center of Exceptions



## ~ Defining an Outrageously Delightful Experience ~

In a multi-year customer experience management study of nearly 24,000 participants, Strativity Group has explored the customer experience from both the perceptions of experience creators (employees) and experience recipients (customers).<sup>3</sup> The study concluded that as a rule, experience creators and experience recipients have widely differing perceptions about the quality of the experience. The vast majority of employees claimed that they delivered great experiences and exceeded customer expectations, while the majority of customers stated that their expectations were not even met.

Similarly, a majority of experience creators believed that they used common sense and discretion when dealing with customers, while experience recipients stated that common sense and discretion was not felt by them. Topping the findings was the assertion by customers that those individuals responsible for creating and delivering the experience had minimal

3 *Excellence Every Day* (2008) by Lior Arussy

understanding of their lifestyle, pains, challenges and aspirations. In the absence of this understanding, employees will never be able to deliver the quality of service expected by customers.

The customer experience needs to be defined, specified, explained and communicated by companies to their employees. This makes every employee responsible for creating and delivering the experience and will have the means to deliver it and by that execute the brand promise. Merely explaining and communicating the experience to employees will not differentiate an organization from its competitors. Successful organizations need to embed the experience into the corporate culture, hiring criteria, education programs, employee objectives, compensation plans, and incentive programs.

When explaining and communicating the experience to employees, companies should avoid the concept of “following a script”. Rather they should provide their employees with inspirational and tangible guidelines that demonstrate the general principles that one should adopt when delivering the experience. Moreover, these guidelines should incorporate a description of different customer profiles as well as their lifestyles, challenges, aspirations and frame of reference as they relate to the company’s products and services.

Imagine a hotel with employees that are unfamiliar with jetlag. During a consulting engagement with a hotel chain in Europe, we found that employees at one of its premier properties had never heard of jetlag and, consequently, did not appreciate their guests’ challenges in dealing with lengthy flights and different time zones. Hotel employees believed that these jetlagged guests were simply grouchy and difficult. Rather than provide these tired guests with rapid, warm and caring service, they were often snubbed and even placed in hotel rooms above a night club where they were unable to get a good night’s sleep.

Put yourself in the shoes of a jetlagged guest. Ask yourself whether you would consider staying at a hotel where after repeated visits, you were snubbed and placed in rooms that afforded you little opportunity to get a good night sleep. Aside from eventually making a decision to frequent another

hotel, chances are also slim that you would ever recommend such a hotel to your friends and colleagues. People generally do not want to stay in a hotel or conduct business with individuals who are experts at following processes and policies, but care little about their impact on customers.

As consumers, we seek to do business with companies that are constantly elevating the quality and consistency of their customer experiences. We want to deal with empowered employees who not only have the tools and authority to solve our challenges, but have the knowledge and background to truly understand our challenges and how we perceive and appreciate value.

### ~ Education as a Journey ~

Companies that excel in customer experience spend far more on training and educating their employees than typical industry averages – in some cases double the industry average! The Ritz Carlton hotel, the perennial customer experience vanguard among hotel chains, invests an enormous 10 percent of its payroll on employee training.<sup>4</sup> At the Ritz Carlton, training is not perceived as a destination to be reached at the conclusion of orientation but is recognized as a journey that never ends. Ritz Carlton continually refreshes their employee training almost as rapidly as they refresh their food and flowers!

The Ritz-Carlton hotels, along with other customer-centric organizations, recognize that only by employing a multi-faceted and extensive training program will their employees be able to consistently deliver the highest quality customer experiences. The multi-faceted program includes elements such as customer lifestyle analysis, emotional engagement, and communication

4 Training Magazine, March 2007

techniques for disseminating bad news to customers.

These programs routinely include scenario-based coaching and role playing so that employees can visualize, practice and perfect (to the extent possible) their conduct during these interactions. This training does not stop when initiation is complete. They employ extensive education programs that incorporate regular refresher and ongoing training that is not relegated to weak performers (though they may receive additional training), but to all employees irrespective of performance. A growing number of companies are buttressing their core training programs by incorporating inspirational or motivational training to ensure that their employees remain motivated and do not regress to “auto- pilot” mode.

## ~ Emotionally Engaging at Every Touch Point ~

Emotional engagement sounds like an obvious and integral element of the customer experience. In reality, however, few companies succeed in emotionally engaging their customers through direct or indirect company-customer interactions. Employees at many organizations simply adhere to corporate policies and follow the process. This sends a clear message to customers – “we care more about our policy than we do about you”.

During human interactions customers provide us with cues. They bring up personal matters such as vacations, funerals, investments, and other issues at home. When these cues are given, it is incumbent upon employees to recognize the opportunity to make a human connection with customers. If a parent’s child is graduating school and is applying for his or her first credit card – recognize this achievement. If someone is requesting a change of address because she is moving from an apartment to a house – recognize this milestone.

Employees can also pass along this information to other groups in the organization so that cross and up sell offers can be made to the customer

to the benefit of the organization. Additionally, these dates can be filed in a database by the company for sending messages of congratulations in the future. They can also be used for targeted marketing campaigns which are far more efficient and generate better results for companies than blanket mass mailings.

Simply following processes and adhering to policies might get the job done but will rarely, if ever, establish an emotional connection that customers will remember and cherish. At the most basic level all that employees need to do is listen, pay attention and react in a manner similar to when their family and friends share news with them. However, most employees do not act this way. They ignore such cues and leave their customers disappointed and disillusioned.

Too many companies leave it to their individual employees to define emotional engagement. Without corporate definitions and guidelines, this leads to personal definitions and varying outcomes of employee performance – some with absolutely no emotional engagement at all. In order to effectively and consistently engage customers emotionally, companies need to define this principle and educate their employees accordingly.

Employees need to recognize and accept the opportunity to make human contact as a personal opportunity to help someone. In order to do this and be successful, companies must ensure that they have the right people, those who are able to establish an emotional connection with customers. To that end, companies must adapt their hiring criteria so that they select individuals with a strong service orientation and who see serving people as a personal and inspirational mission.

Emotional engagement cannot be considered a chore and cannot be mandated from above. Employees need to internalize the beauty of having the ability to help another human being through good and bad times. Organizations can illustrate this principle through stories and examples that demonstrate how employees can emotionally engage customers during every interaction.

## ~ All the Information I Need ~

Imagine a help desk devoted exclusively to handling employee challenges with BlackBerrys, but where service representatives do not actually possess or have access to BlackBerrys. Sound crazy? It is not. During one of our customer experience audits we discovered this very situation – a BlackBerry helpdesk without sample BlackBerrys for training and reference purposes.

For companies planning to empower their employees to deliver great customer experiences, they must first be granted unfettered access to the tools and information they need to answer customer questions and resolve their challenges. Only a fully informed employee base will be able to turn a traditional customer service department into a center of exceptions. Knowledgeable employees will be able to answer and resolve complex queries and problems. Uninformed employees will look utterly helpless in front of customers – not exactly the impression that most companies wish to convey to those who keep them in business.

Customer experience vanguards like Virgin Atlantic and Ritz Carlton go even farther. They provide their employees with financial data, such as customer spending levels along with service and product costs, so that they will be empowered to provide the appropriate resolution that will both delight customers and at the same time be profitable to the organization.

One example of a financially driven decision took place on a Virgin Atlantic flight where the in-flight entertainment system was broken. A flight attendant provided passengers with a choice of free air miles or duty free products because she knew the likelihood of customers calling into the customer service center and the associated costs of these calls and subsequent escalations. The flight attendant also segmented passengers by seat type so that passengers in first and business class were offered more miles or more money to spend on duty free items as their resolution would ultimately

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cost the company more. Presenting passengers with this choice in real-time not only satisfied disgruntled passengers but saved the company money by preventing the likelihood of mass complaints to the call center.

Virgin Atlantic and a number of other companies truly trust their employees to make the right decisions for customers and the company. Those organizations that do not trust their employees would do well to not put them in front of customers. Organizations which claim that they trust their employees should encourage them to engage customers and try to solve their sensitive and complex challenges at the moment of truth.

## ~ Empower to Differentiate ~

At the center of exceptions, employees will have complete authority to answer customer questions and resolve problems without the need for transfer or escalation. Organizations will simply be unable to consistently provide high quality experiences without employees who are empowered to deliver them. While customer service and related agents have the authority to answer self-service type questions, many are unable to resolve complex questions. Instead, the inquiries require supervisor approval or transfer to another more empowered department.

The scope of authority granted to employees in the center of exceptions needs to be redesigned to include broad decision making authority to resolve complex or tier two and three type issues. Inevitably, there will be employees unwilling or unable to accept this transition. As organizations transition from traditional customer service functions to a center of excellence, they will need to determine which employees should be retained and which should be let go or moved to other areas of operation

Ultimately, companies should hire and retain employees that want to be empowered and also act empowered during customer interactions. The philosophy behind broadening the scope of employee authority is to minimize escalations and transfers to ensure first contact resolution. The guiding principle for organizations truly wishing to empower their employees should be that they grant the same knowledge and authority to front-line employees as they do to supervisors. There should rarely, if ever, be a need to escalate a problem to someone with more authority.



## ~ Recognize the Stars ~

At centers of exceptions, companies align employee performance with incentives that appropriately reward the desired performance and also encourage other employees to strive to obtain these incentives. The size and type of the rewards and the frequency with which they are disseminated correlates with the performance standards established by the organization. If your company seeks mediocrity, the occasional pair of movie tickets will suffice. If your company seeks excellence, the rewards must reflect this.

If the goal is to establish or maintain a center of excellence, you will have to go much further and recognize employees as the stars they are. If they are recognized and treated like stars, they will behave accordingly with your customers. If the incentives are inspirational, employees will aspire to do even more.

To that end, it is incumbent upon companies to offer incentive and recognition programs that promote and reinforce this standard of excellence. Reinforcing the concept of exceeding customer expectations should be done by offering rewards and incentives that *exceed* employee expectations. A plaque, gift certificate or a couple of movie tickets will not suffice to reinforce much of anything. Rather, companies should offer meaningful incentives such as a week in their dream car, courtside tickets to a basketball game, VIP seats at a premiere fashion show, or a visit to the pit at a NASCAR race.

However, incentives and recognition do not have to be costly, particularly during challenging economic times. A parking spot next to the CEO, lunch for a week in the executive suite, handwritten letters from senior executives, a company wide broadcast thanking a particular employee for exceptional work would also have tremendous impact. There is no limit to the type of recognition and incentives that can be used. The only limit is the imagination and creativity of the organization.

The impact of an incentive and recognition program will be determined by employee perception of the program. If they can see (through the type and frequency of incentives) just how serious their organization is about exceeding customer expectations, they will alter their work performance to deliver those exceeded expectations. If they do not believe that the company is serious, their performance will not change.

## ~ Demonstrating the Value ~

The cornerstone to a successful customer experience strategy is not only providing great customer experiences but demonstrating to customers the value they receive. Through the fog of complaints, long wait times, product defects, and difficulties reaching customer service agents, it is easy for customers to forget the immense value that they receive from the companies with whom they routinely do business.

This is especially a problem with reliability-based services such as utilities, cable, telecommunications and insurance. In these industries, customers become accustomed to having electricity, cable, internet and phone service and inevitably take it for granted. After all, when was the last time that you called your internet service provider to thank them for reliable web access? Only when problems occur do customers take notice and gauge these companies on response times, ease of operator access and duration of outage. In such reliability-based industries it is the company's role to demonstrate the value and consistency of their services to customers.

Additionally, organizations should train their employees to learn how to identify opportunities to remind customers about the value they receive particularly when problems arise. However, employees should also exercise discretion when reminding customers about this value so as not to appear annoying and artificial.

Companies should develop tools that enable their employees to discuss and in some cases illustrate the value they deliver to customers. While this varies by industry, examples for reliability-based services include percentage of on-time deliveries, as well as duration and frequency of outages (expressed in percentage terms for services such as internet, cable, electricity). Sharing this information with customers will help them internalize the value provided and will foster a greater sense of understanding and tolerance when problems actually occur.

## ~ Raising the Bar – Measuring Exceptions ~

As the saying goes, “you are what you measure”. Nowhere is this saying more applicable than in the context of customer experience management. Asking customers generic questions to gauge the quality of the customer experience will yield few if any actionable results. A question asking about the courtesy of agents will likely yield an affirmative response (at varying levels) but will provide little insight on the perceived experience that customers received.

Companies that ask questions which yield insightful and actionable answers might not get the glowing responses they crave, but they will identify opportunities for growth and improvement. At the top of the list of questions to be asked of customers is whether the organization delivered an exceptional experience. While the response may not always be the desired “yes”, a low score should push the organization to discover and rectify the reasons for the failure so that they can meet, and even exceed, the high standards that their customers have set.

Beyond asking customers to rate the overall quality of the experience, companies should ask customers to define their customer experience expectations. This will enable the company to build the unique experiences their customers seek and thereby ultimately allow them to exceed their customers’ expectations.

## ~ In Short – Exceptional Performance is the New Standard ~

Between growing customer demands for great experiences and the availability of multiple interaction channels, the traditional definition of the human interaction for customer service is gradually becoming obsolete. The future definition will focus on the delivery of *exceptional* customer experiences for all types of challenges, but particularly those that cannot be resolved through self service. We all need to set higher standards and aspire to handle all interactions, particularly exceptions. Most importantly, it is critical to remember that human interactions in the customer service or retail channel is gradually evolving from being one of a series of interaction channels to eventually being *the* sole channel for competitive differentiation and value generation.

The principles listed above are the foundation for establishing a center of exceptions. Wherever there is a human interaction, organizations will have to establish an exceptional service performance infrastructure so that employees will have the means to meet and exceed customer expectations. Even in a world increasingly dominated by self service media, customers expect that when they exhaust the self-service option, companies will step up and deliver exceptional and personalized “live” service.

Organizations need to adapt business strategies, empower employees, enhance their technology and information infrastructure, create extensive training programs and deploy relevant incentive and recognition programs to meet and exceed heightened customer expectations. Those companies that do so will increase employee satisfaction and improve employee performance. The results will be reduced customer attrition and increased revenue and profit. These organizations will succeed in fulfilling their brand promises and differentiating themselves through live customer service in a world increasingly dominated by self-service channels. Ultimately, the most

successful companies will transform traditional customer service functions into a unified center of exceptions that will deliver great experiences and command customer loyalty.

We live in a new world where the usual and reliable fail to meet the ever heightened expectations of our prospects and customers. We need to excite and delight our prospects and customers to gain and maintain a competitive edge in our hyper competitive world.

Welcome to the center of exceptions where exceptional and personalized solutions for the most complex of issues is the new standard of excellence!

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# Exceptional Service

While organizations race to introduce customer self service, customers demand more personalized and customized experiences. As customer self service becomes pervasive, companies struggle to provide differentiation that will keep customers coming back.

This book examines the role of human interaction and customer service as it relates to the new world of self service.

It will propose a new way to evolve customer service into the differentiating factor of the organization through engaging exceptional customer experiences.

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