



The Customer Communicator Web Extra



Start setting goals for 2017

Goal setting in the customer service environment involves understanding customer needs, identifying the actions or behaviors that help to meet those needs, and setting goals for improving skills in those areas. Simple, right?

It might sound simple, but there's a lot that can come between setting a goal and achieving it. To help smooth the way, *The Customer Communicator* spoke to Gary Ryan Blair, president of The GoalsGuy Learning Systems.

Set a customer-based groundwork

Before deciding what goals to set and how to achieve them, reps first have to understand the "why" of the goals that they are setting, remembering in particular that these are business-related goals. "The reason that is important, especially in customer service," Blair says, "is that we sometimes have a tendency to look at goals from our own perspective when we really should be looking at them from the customer's perspective."

Once you have an understanding of the customer's "why," says Blair, you can begin to set and prioritize goals like answering calls more quickly, being friendlier on the phone, getting more accurate information, improving your first-call resolution rate, or whatever is valuable to your customers based on their needs.

Three elements of successful goal-setting

The path from setting a goal to achieving it, Blair suggests, involves three elements. A goal needs to be specific, it needs to be measurable, and it needs to be time-bound.

Set focused goals. You can't just set vague and unspecific goals like, "I want to get better at my job." Goals need to be specific, says Blair: "Exactly what is it you are trying to achieve for the customer? Or what is it that the customer wants to achieve through you?"

It's imperative that you get down to precise standards or precise action steps in as much detail as possible."

To get to that specificity, he suggests breaking your job down into its component steps or parts — the greeting, collecting information, analyzing information and problem solving, offering solutions, follow-up, etc. "Then," Blair says, "identify the areas in which you are weak and set goals for improvement. That might be by providing a friendlier greeting, or reducing the number of calls that you have to transfer."

Set measurable goals. You have to be able to measure your progress toward achieving a goal, otherwise there's not much point in setting it. Fortunately, there's much in a customer interaction that can be measured — whether it's customer satisfaction with the call, call resolution rates, call handle time, or simply the number of times you use the customer's name during a contact.

Set firm deadlines. The last feature of successful goals is that they are time-bound, "and this is where the vast majority of reps make a mistake," Blair says. "They fail to set a time frame in which to accomplish their goals. Goals have to come with deadlines. Deadlines create a sense of commitment and urgency, and they hold you accountable to perform in a given period of time."

But be realistic with the deadlines that you set for yourself. "People often underestimate the amount of time it's going to take to reach certain goals," Blair says.

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