



CUSTOMER SERVICE MANAGER CERTIFICATE

CUSTOMER SERVICE MANAGER CERTIFICATE (CSMC)

STUDY GUIDE

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Please use this guide to assist in preparation for your Customer Service Manager Certificate (CSMC) exam.

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I. BUSINESS TRAINING:

BusinessTraining.com is the leading online program for specialized niche business certification programs. The team behind BusinessTraining.com is comprised of industry experts in niches including online marketing, project management, public relations, consulting, and many more.

This experience, combined with our advisory board's expertise in online education and training, is what makes it possible to provide the training and certification programs found on our website.

BusinessTraining.com is part of the G.T.C. Institute, a global training and certification organization that has provided practical industry-specific certification to over 1,000 clients from the United States, Europe, and more than 30 other countries around the world.

We provide high value training programs that provide function knowledge on very specific business topics such as public relations, online marketing, project management, international business, and consulting.

BusinessTraining.com's Mission: To provide professionals with high impact business training and certifications in niche subject areas that are functional and immediately beneficial.

BusinessTraining.com helps you to:

- Quickly gain specialized knowledge in highly valuable business niches.
- Enhance your credibility, resume, and overall value in the marketplace.
- Complete our training programs in 5 months from anywhere in the world.

Our programs accept participants year-round and are flexible to work with your current work schedule and academic constraints. You can complete one of our programs in 2 months or 2 years; the choice is yours.

II. CSMC DETAILS AND TIMELINE:

PROGRAM DETAILS:

The **Customer Service Manager Certificate (CSMC)** certification program is unique in that it is modeled after many online courses offered at Ivy League institutions today, offering more value for a more cost-effective program. The CSMC Program is a self-study program that includes educational multimedia resources in video form, a study guide, required readings, and a flexible online examination process, accessible around the world.

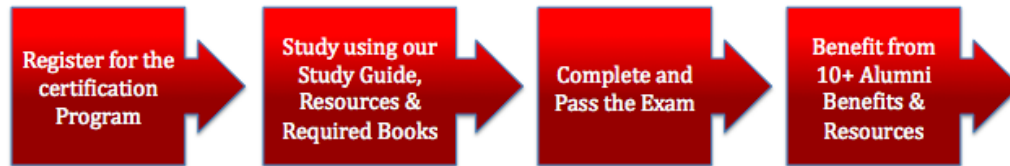
The online exam is structured so that in order to complete the exam within the 2-hour time frame one must read through all of the assigned materials and conceptually understand the majority of the material to score well enough to pass the exam.

Our goal is to offer the most challenging program in the industry while also providing all of the learning tools possible to ensure participants get the most out of the experience. By testing the knowledge depth and comprehension from the materials digested, the CSMC certification prepares individuals for successful, real-world application.

The Customer Service Manager Certificate (CSMC) program is sponsored by the GTC Institute and offered by BusinessTraining.com. This certification program is designed to show and certify that you have gained an in-depth understanding and high-level, specialized knowledge.

In addition to the benefits of gained knowledge, growing industry recognition, more knowledgeable career choices, and networking, our organization is also developing additional resources for CSMC Participants. This includes video and MP3 recordings on Q&A or strategies and tactics, webinars, access to interviews with internet marketing professionals who have more than 10 years of experience in the industry, among many more benefits.

4 STEP CERTIFICATION PROCESS



TIMELINE & EXAMINATION DATES:

Programs are offered through open enrollment, making our programs 100% flexible with your current work or academic schedule. After joining you may select an examination date that works well for you from the following dates we offer annually: January 10th, April 10th, July 10th, and October 10th.

BusinessTraining.com exams are administered 100% online. When you have completed the strategic project (outlined later in this study guide), please follow the project submission instructions. Once you have submitted your completed project, you are welcome to schedule your exam date.

Please note that your exam date request must be received at least 3 weeks before the exam date. For example, if you would like to sit for the January 10th exam, we would need to receive your request no later than December 20th.

To register for an examination date:

- 1.) Email your completed CSMC project (*explained in detail in this study guide*).
- 2.) Include your desired exam date in the email with your completed project.

BENEFITS OF THE CSMC:

- Specialized knowledge and instructions on how to attract, retain and create loyal clients so that you are building the business through exceptional customer service.
- Confidence, an improved resume, and the right tools to use when facing customer service challenges.
- Training on customer service fundamentals and best practices that may be used in phone, in-person, email, or click-to-chat settings.
- Proof that you have mastered a certain level of customer service and loyalty specific knowledge by passing our online examination, all alumni receive a certificate showing their accomplishment within our program.
- Exclusive Access to tools and multimedia training resources found online within the CSMC Certification Program.
- Add the CSMC Designation to your resume, assuring employers that you are dedicated to working in the industry, passionate about learning more, and able to work more efficiently after being promoted or hired.

PARTICIPANTS OF THE CSMC PROGRAM CAN INCLUDE:

- Individuals interested in furthering his/her education and knowledge in business, customer service, and management of a customer service team
- Business owners looking to improve their company's customer service
- Seasoned management professionals looking to enter the customer service industry
- New business professionals who have just taken a position as head of a customer service team
- Customer service managers looking to improve their customer service knowledge and leverage the changes the customer service industry has experienced in the past 10 years

LEARNING OBJECTIVES/GOALS OF THE CSMC

- To obtain broadest spectrum of knowledge regarding the behavior and strategies needed in securing a loyal customer base.
- An understanding of the intricacies of customer loyalty.
- The right information needed to manage the people who your customers interact with.
- Successful, proven tactics from the best sources that are applicable for the real world.

THE CSMC EXAM WILL TEST PARTICIPANTS IN 6 MAIN AREAS:

1. Customer Service Overview:
 - a. Industry trends
 - b. Common practices
 - c. The current landscape
2. Customer Loyalty:
 - a. What defines it
 - b. Why it's the ultimate goal of any service provider
 - c. Practices to pursue and secure it.
3. The Customer:
 - a. What creates and influences their perceptions and expectations.
 - b. Their needs and wants; how to uncover them
4. Problem Solving
 - a. How to handle issues
 - b. Work within acceptable terms to satisfy the customer
 - c. Dealing with difficult situations and people
5. Company Culture and Organizational Leadership
 - a. How company culture, attitudes and leadership impact customer service
 - b. The existing skewed perceptions and what companies must do to improve
6. Effective Communication Skills
 - a. Phone
 - b. Email
 - c. Phrases
 - d. Evaluation techniques

III. REQUIRED READING

1. Delivering Knock Your Socks Off Customer Service by Kristen Anderson and Ron Zemke. ISBN :0814479707
2. Building Great Customer Experiences by Colin Shaw and John Ivens. ISBN 1403939497
3. Customer Satisfaction is Worthless, Customer Loyalty is Priceless by Jeffrey Gitomer ISBN: 188516730X

IV. CUSTOMER SERVICE MANAGER CERTIFICATE (CSMC) STRATEGIC PROJECT:

The Customer Service Manager Certificate (CSMC) Program requires participants to complete a Strategic Customer Service Project in order to graduate from the program. This plan is worth 100 points and accounts for 50% of the total grade within the program.

As such, non-submission of this strategic plan will result in an automatic failing grade for the CSMC program. If you have any questions, please email us at **CSMC@BusinessTraining.com**.

Project Goal: For this Strategic Project, please use the following information for each scenario to create a solution. Please be sure to provide a solution that will not only appease the customer but prevent further complaints (internal) or word-of-mouth (external). There is no length requirement, so long as you provide a solution. Please keep answers under 500 words.

Requirements/Grading: Your answers will need to be written in a Word Document and sent to CSMC@BusinessTraining.com *before you schedule your exam*.

Once you have completed this project, please send it and your request to take your desired exam date at least 3 weeks before the scheduled exam date. **To schedule yourself for an exam date**, this project must be received, completed, at least 3 weeks before the exam date. For example, to take the October 10th exam date, this project must be received (as well as a request to take the exam) no later than September 19th.

The information for the CSMS project is outlined below. Please use the following scenarios to answer the questions that follow.

SCENARIOS:

1. Ms. Childs:

The Scenario:

You are a customer service manager for a large software company's customer service centers. One of the largest sellers you offer support for is a computer software product for photo imaging. You and your customer service representatives are not certified to give technical support, but you have all gone through training of installation, activation, and registration of the program, so you all know the basics.

You get a call from one of your reps about an upset customer, Mrs. Childs.

Mrs. Childs is a retired widow who lives alone. She is using your product, but is unable to make a simple change to some files on her computer, and is now calling to ask for your assistance. She is hard of hearing, not familiar with technology, and very afraid of being taken advantage of. She is also threatening to refund her product.

She is calling today in the hopes of getting some technical support, and would like to utilize the free support the product says is available to purchasers of the product. She has not yet registered her product, however, a requirement to receive the free support. Registration is normally optional, and not a requirement to use the product, but is required to receive the technical support.

Since it is optional, she does not want to register (and she will tell you this again), but still wants to get her free support for the program she is unable to use. She does not fully understand what

registration is, and does not want to give out her personal information. This information is required, however, for Tech Support to offer her any support.

Registration ensures that, should the customer lose their CD Jewel Case or Serial Number, they can access it through a simple phone call to your company. It also ensures that you have a record of their calls so that they do not have to repeat themselves over and over again, and the next time they call, you can pick up where you left off. It also means that she can call up to 2 more times with the same issue (if it is not solved, reoccurs, etc.) and continue receiving support for the same case (which is already comped.) If she does not complete registration, follow-up support calls cannot be made (since there will be no record), and future support calls will be charged at \$50/case.

Registration takes 2 minutes and requires the program serial number, a first and last name, email address, phone number, and address. For this promotion, the code on the box for the free support is also needed.

The solution with Tech Support may be an easy one (since she most likely misread the instructions), but she is also a slow computer user and technicians are paid a higher hourly wage. They can only be sent paying (or registered) customers, unless approved by the manager. Too much free support is something the company cannot offer, but the manager does have the ability to approve free support.

You tell your rep that you will take the call.

Questions: *What do you tell Mrs. Childs? What is your solution? Please write your "script" of what you would tell Mrs. Childs. You want to avoid her hanging up unhappy. Please feel free to rationalize and explain the reasoning you used for saying one thing or offering one solution over another.*

2. Ms. Childs, Part 2:

The Scenario:

Please read the information from Scenario #1. Mrs. Childs decided not to register her program and is now calling for the same issue. She was given free support, though she didn't register her program, and now wants to talk to Tech Support again. Since she didn't register her program, there is no record of her call, and she must now pay for support.

Question: *What do you tell Mrs. Childs this time?*

3. Mr. Smith:

The Overall Scenario:

You are a manager of a large hotel chain in Portland, Oregon. You have been instructed by your boss (who has just completed the CMSC) that customers should be treated with great respect (even the difficult ones). You're told that you can go above and beyond your normal duties, or at least what is provided in a service or product purchased by a client. For example, normal delivery time on a room service order is 30 minutes. Delivering it in 20 or less is going above and beyond. Also providing something on the menu for free that costs little to add, such as an extra sauce the customer asks about, is something you can do. So long as the actual cost of the product is outweighed by the possibility of a loyal customer telling others about your service, you've been told you can do it. (The owner will, however, step in if someone is going overboard with giving things away for free.)

Your boss mentions “fixed costs”, and how you can use them to your advantage. Fixed costs are things like rent, which will not change depending on how many guests the hotel has. That loss margin can decrease, however, if more rooms are full.

With your new instructions, you’re presented with some ideal opportunities to try out the new customer service strategy.

The Customer Scenario:

Mr. Smith comes in to your hotel once a month for business. He stays for 4 nights and 5 days each time. He stays in a single room with simple amenities and doesn’t cause trouble. He never seems overly thrilled with service, but your low rates, coupled with the hotel’s location, seem to keep him coming back. Your competitors across the way, however, are offering a promotion: the same room, *for less*. Smith tells you about this as he’s checking in. He mentions the flight was terrible this time, and the rental car wasn’t what he was hoping to get. He also asks if the hotel bar is closed; you say it is, and that he just missed it closing 15 minutes ago. His flight was delayed, he says, and he looks noticeably disappointed.

Question: *Within reason (so you don’t lose your job), what are some things you can offer to Mr. Smith to ensure he continues coming to your hotel?*

V. CSMC EXAM PREPARATION

EXAM COMPOSITION:

There is a total of 100 points available to earn for the exam, 80 of which can be earned from the multiple choice or true/ false questions that are worth 2 points each, and 20 of which can be earned from 2 short answer questions that are worth 10 points each.

Please see below for the composition and distribution of the points in-depth.

Topics and Weights	
Customer Service Overview	14 MC questions (14 pts)
Customer Loyalty	12 MC questions (12 pts)
The Customer	14 MC questions (14 pts)
Problem Solving	14 MC questions (14 pts)
Company Culture & Organizational Leadership	12 MC questions (12 pts)
Effective Communication Skills	14 MC questions (14 pts)
Case Study Examples/ Situational 2 Essay Questions	2 Questions (20 pts)

You will have 2 hours to complete the exam. Those who have not made the effort to read the materials will have a hard time completing the exam within the allotted time, but for participants who have read the required readings 2 hours will be sufficient.

In order to pass the CSMC certification and earn the CSMC title, participants must earn a minimum grade of 80%.

TERMS AND CONCEPTS TO KNOW:

Below, please find the exam topics and the corresponding terms and concepts that you should be able to define after having read the required readings.

Please define the terms from the required readings rather than a dictionary. You will be tested on the definitions that authors have written.

Customer Service Overview

- Competitive advantage
- Brand
- Differentiation
- Customer experience (CE)
- The physical CE
- The emotional CE
- Expectations
- Word of mouth
- Embodying the brand
- Commoditization
- Call centers
- Product
- Perception
- Brand promise

Customer Loyalty

- Loyalty
- Trust
- Transparency
- CRM –Customer Relationship Management
- Tangibles
- Responsiveness
- Reliability
- Reassurance
- Reassurance
- Internal customers

The Customer

- Stages of the customer experience
- Attitude
- Motivators

- Closed ended vs. opened-ended questions
- Asking questions
- Emotional intelligence
- Motivations
- The catch point
- Consistency
- Standards
- Initiatives

Problem Solving

- Emotional awareness
- Empathy
- Business objectives
- Benchmarking
- Internal communication
- Rule breaking-types of rules
- Measures
- Targets
- Satisfaction
- Promises
- Taking responsibility
- Apologies
- Recovery

Organization and Culture

- Culture
- Empowerment
- Operations
- Awareness
- Overlaps
- Transactional costs
- Ownership
- Involvement
- Consistency
- Inside-out culture
- Outside-in culture
- Defined Culture
- Aligned culture
- Signed culture
- Designed Culture
- Leadership
- Multi-channels of communication

Effective Communication

- Greetings
- First impressions

- Visual impressions
- Accountability
- Non-verbal communication
- Listening
- Trigger words
- Rapport building
- Transferring calls
- Satisfactory
- Policy
- Rules
- Voice tone and pace
- Body language
- Sympathy

SAMPLE QUESTIONS:

1. Which one of the following is NOT a reason for current poor customer service?

- a. No written principles
- b. Infrequent employee training
- c. The goal is to satisfy customers
- d. Fierce competition

2. The key Customer Experience Differentiator is:

- a. Price
- b. Features
- c. Feelings
- d. Quality

3. One of the major evaluations of customer service is responsiveness. An example of responsive service that goes above and beyond to provide the ultimate experience is:

- a. A short call queue
- b. Asking the customer their time needs and then agreeing to and delivering on that request.
- c. Giving the customer a time window for product/ service delivery, aka. 'ready next week...'in order to not over promise and under deliver.
- d. Providing a comfortable waiting area with beverages, magazines, etc.

4. Which of the following is NOT a major evaluation of exceptional customer service?

- a. Reliability
- b. Assurance
- c. Satisfaction
- d. Tangibles

5. Often overlooked, competitive advantages aren't the most obvious. An example of a clothing retailer's would be:

- a. Best value
- b. The most prevalent advertising

- c. Celebrity endorsements and expert accolades
- d. A non-expiring return policy

6. What is the fundamental aspect of great customer experiences that result in long-term competitive advantage?

- a. Emotional connection
- b. Proven reliability
- c. Actualized value
- d. Ultimate convenience

7. The value of retaining existing customers is undeniable. According to the Technical Assistance Research Programs, Inc (TARP), at least how much more does it cost to obtain a new customer than to keep a current one?

- A. 5 times as much
- B. Double the amount
- C. Up to 2 percent more depending on advertising quality
- D. 10 times as much

VI. BOOK REVIEWS

To read the book reviews for the CSMC Program, please download the CSMC Book Reviews document from the classroom area. If you have trouble locating these, please let us know.

VII. FAQ (FREQUENTLY ASKED QUESTIONS):

Have more questions or need more information? Please see our constantly updated FAQ (Frequently Asked Questions) section on the BusinessTraining.com website here at <http://BusinessTraining.com/FAQ.html>.

You can also get in touch with the BusinessTraining.com team over email at Team@BusinessTraining.com, by phone at 503.664.0678, and through our ClickAndChat tool, accessible from our homepage: <http://BusinessTraining.com>.

Thanks for joining BusinessTraining.com! Please let us know if you have any questions.

-The BusinessTraining.com Team & G.T.C. Institute

VIII. SAMPLE QUESTION ANSWERS:

Please see the following answers to the sample questions provided. A brief explanation was given for each answer and why the other options were incorrect. If you didn't do as well as you thought you would have, please consider re-reading the books or supplementary readings as the sample questions were drawn directly from them.

1. **D** - Customer service is how companies gain the edge over that fierce competition; it isn't a hindrance but a necessary reality that exceptional customer service is critical.
2. **C** - Feelings: Emotion is what comprises an experience and differentiates it from the classic components of a customer's purchase.
3. **B** - Determining the customers' specific needs is a critical in delivering the best of service. Instead of giving them your timeline, work as best you can (without under promising) around their schedule. The more specific the time, the better... widows of time are frustrating, even if you have to make it a little longer, it's best to be as exact as possible.
4. **C** - Satisfaction is just that...it does not denote loyalty, the ultimate result of exceptional customer service. Just because a customer is satisfied, doesn't guarantee they'll continue to be a customer.
5. **D** - While importance of the other factors certainly exists, it's the extras that add to the experience for a customer, such as the ability to return a good whenever. The feeling of security and concern the shopper has as a result of that term will carry them toward the loyalty level.
6. **A** - The emotional aspect is what reigns in repeat purchasers; all the other elements can be sought elsewhere, however, a feel-good interaction will steer a customer back above all else.
7. **A** - It costs at least 5 times as much to win new customers that to maintain current customers, and in certain industries the ratio can be as high as 21.