

# **Salt Lake County Planning and Development Services**

## **Customer Service Rules 6/17/2011**

### **Philosophy**

We are in the service business. While we have rules and procedures that must be followed, those rules and procedures are no different than the rules and procedures at any other organization or business. Our goal is to provide our services while complying with our own rules and procedures. Every contact with the customer is an opportunity to meet the expectations that the customer has for us and that we have for ourselves.

### **Greeting the Customer**

There is no other time to establish the correct customer relationship! If we start the conversation incorrectly, we may permanently damage our ability to achieve a successful outcome.

When a customer signs in at the front counter:

1. Stand up and walk to the front counter to greet the customer. Do not speak to them from your chair! It reflects badly on you. Smile! Say: "Hello, how may I help you?"
2. If you are using the phone at the time and can't greet the customer, acknowledge them with a smile and a professional hand gesture such as a wave.

When a walk-in customer requests to speak to someone or is here for an appointment:

1. Locate our employee for the customer via the telephone. Let our employee know that they have someone here to see them.
2. If you cannot locate our employee, contact their team lead and let them know about the visitor.
3. If you cannot locate the team leader, contact the section supervisor.
4. If you cannot locate the section supervisor contact Kathy Hart or Rolan Yoshinaga
5. Ask if they would like to take a seat in the waiting area. Say: "If you would like to take a seat you can wait over there, someone will be with you shortly".

When a customer is angry:

1. Approach the customer in a serious manner (sometimes a smile can be counter-productive), and ask: "How can I help you?"
2. Listen to their story and avoid all temptation to cut them off and give them an answer without hearing the whole story. Good listening skills are critical in this instance. Nod, say "OK", etc. to keep them talking. Avoid taking the criticisms personally, they are angry about something the system did to them.
3. Acknowledge their frustration. Say: "I can see you are frustrated. Let's see what we can do."
4. If you can fix their problem, do it. If you can't fix it, approach your team leader with the problem.
5. Do not allow the customer to leave without some kind of a solution.

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**Answering the phone**

Initial Greeting:

Salt Lake County Planning and Development Services, <Your First Name> speaking.  
How may I help you?

Putting someone on hold:

1. Ask for permission before putting anyone on hold. Say “Do you mind if I put you on hold? I will be right back to you.”
2. Do not over share! It isn’t appropriate to share details about why you are putting them on hold.
3. If you think you can’t get back to them quickly, ask for their number and you will call them back.

Transferring a call:

1. Say “Do you mind holding while I transfer you to that number?” When they say yes, tell them the phone number you are transferring them to then start the transfer.
2. Stay on the line until the other party answers. Tell them you have a transfer call.
3. If the other party is not answering, return to the caller and say “They are not answering, can I take a message?”

Taking a message:

1. Make certain that you always have a phone note pad and pen next to your telephone.
2. Capture, name, date, time, return call number and subject matter.
3. Place the message in the employee’s mail slot.

Your voice mail message if you are in the office:

*“Hello, this is <NAME> of Salt Lake County Planning and Development Services. I am in the office today. Your call is important to me. Leave a message after the tone, including your name, phone number and the best time to call. If there is research I can do before returning your call, please include details in your message. I will return your call as soon as possible.”*

Your voice mail message if you are out of the office:

*“Hello, this is <NAME> of Salt Lake County Planning and Development Services. I am out of the office until <TIME OR DATE>. Your call is important to me. Leave a message after the tone. I will return your call as soon as possible. If you need immediate assistance please contact <YOUR TEAM LEAD AND THEIR NUMBER>.”*

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**General Customer Communication**

1. Do not over share! The customer doesn't need to know about your personal life, medical condition or your employment status. If you are unable to meet them on time or you will miss a deadline, apologize and move on to helping.
2. Meetings: If you aren't adding value to a meeting you should question if your presence is needed. Just having an opinion isn't enough of a reason to attend.
3. Unplanned customer visits: The requested employee must greet the customer and find out what they need. If you are unable to help them at that exact moment, let them know or request an appointment with the customer.
4. Always use the sign-in board to identify if you are in a meeting!

**Email Rules**

1. Be concise and to the point
2. Answer all questions, and pre-empt further questions
3. Use proper spelling, grammar & punctuation
4. If you are out of the office, your auto-reply will say: "I am out of the office until <DATE TIME> , if you need immediate assistance please contact <TEAM LEADER> at <PHONE NUMBER>
5. Answer swiftly
6. Do not attach unnecessary files
7. Do not write in CAPITALS
8. Don't leave out the message thread
9. Read the email before you send it
10. Take care with abbreviations and emoticons
11. Be careful with formatting
12. Do not forward chain letters
13. Do not request delivery and read receipts
14. Do not ask to recall a message.
15. Do not copy a message or attachment without permission
16. Do not use email to discuss confidential information
17. Avoid long sentences
18. Don't send or forward emails containing libelous, defamatory, offensive, racist or obscene remarks
19. Don't forward virus hoaxes and chain letters
20. Keep your language gender neutral
21. Don't reply to spam