CUSTOMER SERVICE PROGRAM TEMPLATE

# New Hire Information

* **Role:** *[Enterprise Customer Support Specialist]*
* **Manager/Reporting To:** *[Name]*
  + **Email Address:** *[[name@company](mailto:name@company.com).[com]](mailto:name@company.com)*
  + **Phone Number:** *[000-000-0000]*
* **Department Head:** *[Name]*
  + **Email Address:** *[[name@company](mailto:name@company.com).[com]](mailto:name@company.com)*
  + **Phone Number:** *[000-000-0000]*
* **Coach/Mentor:** *[Name]*
  + **Email Address:** *[[name@company](mailto:name@company.com).[com]](mailto:name@company.com)*
  + **Phone Number:** *[000-000-0000]*

# Welcome to the Team!

*[Write an introductory message that ignites excitement for this new hire in joining your company.* Clearly state that this is not a contract nor a full list of their expected tasks. Rather, explain that this is a collection of resources that will walk the new hire through the onboarding and training process, and guide them through long-term success in their new role.]

# What You’ll Learn in This Course

*[Write a brief description of each of the main topics outlined in this course, including the* following:]

* **Who We Are**
* **Customer Profile**
* **Customer Service Etiquette**
* **Channels We Use**
* **Our Policy Let’s get started!**

# Who We Are

*[Optional for digital format: You can add a video of your key leader explaining the great things* about your team, their own vision and philosophy, and why they are proud to be leading this group.]

**Our Team Structure**

*[Introduce your customer service team structure and let the new hire know that you are excited to* have them on your team. Assure them that they will be well acquainted with the names of their new team members over the next few days.]

*[Insert organizational chart here]*

**Our Vision**

*[Add a vision statement that clearly describes the type and quality of service that you want to* deliver to your customers at present and in the future.]

**Our Philosophy**

*[Add a customer-first philosophy that inspires your team members to adopt a proactive rather* than a reactive approach to customer service. Provide a brief description of each of the elements enumerated below.]

**We Believe In:**

1. **Respect**
2. **Understanding**
3. **Listening**
4. **Responding**
5. **Serving**

**Recap: Who We Are**

*[Add flashcards that summarize the things discussed under “Who We Are”]*

**Test Your Knowledge**

*[Create three to five questions about the main points discussed under “Who We Are”]*

# Customer Profile

*[Optional: Add a video of the head of your customer service team explaining the importance of* understanding your customers.]

**Demographics**

*[Fill out the template below to define your customer demographics]*

* **Age**
* **Gender**
* **Level of education**
* **Occupation**
* **Address**
* **Marital status**
* **Other details Psychographics**

*[Fill out the template below to define your customer psychographics]*

* **Common concerns**
* **Motivations**
* **Goals**
* **Frustrations**
* **Other details**

**Recap: Customer Profile**

*[Add flashcards that summarize the things discussed under “Customer Profile”]*

**Test Your Knowledge**

*[Create three to five questions about the main points discussed under “Customer Profile”]*

# Customer Service Etiquette

*[Add a video of a key company leader educating your team on the importance of customer service* etiquette in delivering high-quality customer service. Provide details for each of the elements outlined below.]

**General Elements of Basic Customer Service Etiquette:**

* **Transparency about your products and services**
* **Support assistance**
* **Customer feedback**
* **Active listening**
* **Gratitude toward customers**
* **Professional attitude**

**Recap: Customer Service Etiquette**

*[Add flashcards that summarize the things discussed under “Customer Service Etiquette"]*

**Test Your Knowledge**

*[Create three to five questions about the main points discussed under “Customer Service Etiquette”]*

**Channels We Use**

*[Orient your employees on the different support channels that your organization uses and provide* details for each channel listed below.]

**Our Communication Channels:**

* **Phone**
* **Live chat**
* **Email**
* **Social media (Facebook, LinkedIn, etc.)**

**Recap: Channels We Use**

*[Add flashcards that summarize the things discussed under “Channels We Use”]*

**Test Your Knowledge**

*[Create three to five questions about the main points discussed under “Channels We Use”]*

# Our Policy

*[Add a brief overview of your customer service policy to guide the new hires on how to ensure* customer success. Include details of your customer service policy playbook below.]

**Customer Service Policy Playbook Product Overview**

**Purpose Policies**

* **Return policy**
* **Reimbursement policy Communication**

**Recap: Our Policy**

*[Add flashcards that summarize the things discussed under “Our Policy”]*

**Test Your Knowledge**

*[Create three to five questions about the main points addressed under “Our Policy”]*

# Thank You!

*[Add a closing statement thanking your team member for participating in this training.]*

**Chapter Feedback**

*[Add a customized Customer Service Team course survey to check your learner engagement and* feedback.]