

[Module 5 Customer Centricity]

Lecture 6 – Relationship Management

Lecturer: Paul Gauci

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**Undergraduate Certificate in Notarial Law
Fundamentals for Office Assistants**

Objectives:

- To build strong customer relationships and foster customer retention.
- Anticipate customer needs and proactively offer assistance and solutions.



Learning Activity - Discussion

- There are several emerging key trends in the delivery of successful customer service.
- *Can you share any of such trends you are noticing or even experiencing as a Customer?*



Customer service trends

There are a number of key trends in the delivery of successful customer service. These include:

- **expectations of a faster speed of service**
- **personalisation of service, such as the use of names**
- **employees able to provide information on a wide range of topics, often beyond their own area of responsibility**
- **services available in the language of the customer**
- **services delivered to meet individual and specific needs**
- **effective use of information technology to assist customers**
- **availability of services at times convenient to customers**
- **greater value for money**



The ABC's of Customer Service

A – Your customer Service Attitudes

B – Your Customer Service Behaviours

C – Your Customer Service Convictions

“Customer Service is the collection of skills, knowledge, and attitudes presented to your customers by your staff”

Yale University



Your Customer Service Attitudes

About:

- Yourself
- The Company (products/services)
- Your job
- Co-workers
- Customers
- Your role in customer service
- Others?



Your Customer Service Behaviours

- Service & Sales targeting efforts
- Ongoing products knowledge upgrading
- Time & stress management
- Building customer network
- Creating customer value that drives business up sell/
cross sell/ add-on
- Earning and capitalizing on referrals
- Others?



Your Customer Service Convictions

- The Law of Value
- The Law of Compensation
- The Law of Influence
- The Law of Authenticity
- The Law of Receptivity

Source: Go-Givers Sell More - Bob Burg & John David Mann



Customer Service Quiz: The Five Laws

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1. The Law of Value in customer service means:

- A. Solving the customer's issue as quickly as possible
- B. Offering discounts whenever possible
- C. Giving the customer more value than they expect at every interaction
- D. Following the script exactly

2. According to the Law of Compensation, your success in customer service grows when:

- A. You handle more calls than anyone else
- B. You serve more customers and consistently create positive experiences
- C. You avoid escalating complaints
- D. You focus on upselling

3. The Law of Influence in customer service is strongest when you:

- A. Convince customers to accept your solution
- B. Use persuasive language
- C. Stick strictly to policy
- D. Put the customer's needs and interests first

4. The Law of Authenticity in service interactions means:

- A. Always sounding cheerful, even if it feels forced
- B. Sharing personal stories to build rapport
- C. Being honest, human, and genuinely present with the customer
- D. Avoiding difficult conversations

5. The Law of Receptivity teaches that great service requires:

- A. Giving help but never accepting help from others
- B. Being open to receiving feedback, support, and new ideas
- C. Always saying yes to customers
- D. Waiting for customers to ask for assistance



The Law of Value

“Your true worth is determined by how much more you give in value than you take in payment.”

Customer service means exceeding customer expectations. Service is judged by how it matches expectations. If the treatment the customer receives is better than his or her expectations, this is excellent service.

Disney Institute



The Law of Compensation

*“Your income is determined by how many people you serve
and how well you serve them.”*



The Law of Influence

“Your influence is determined by how abundantly you place other people’s interests first.”

“Customer service is a commitment of all employees in a company to make being a customer a completely positive experience one that everyone customer will want to experience time and time again”
- Jack Ferreri



The Law of Authenticity

“The most valuable gift you have is to give of your authentic self.”

“Excellent customer service is the process by which your status organization delivers its services or products in a way that allows the customer to access them in the most honest, transparent, efficient, fair, cost effective, humanly satisfying and pleasurable manner possible.”

- Jack Speer, BizWatch Publisher



The Law of Receptivity

“The key to effective giving is to stay open to receiving.”

- This can be seen in the number client referrals received.





“To my customer:

I may not have the answer, but I’ll find it.

I may not have the time, but I’ll make it.”

UNKNOWN

“Customers feel more comfortable with organizations that they can trust in case of problems with their products and services.”

(Sarah Cook)



Meeting Customer's Needs and Customer Retention



*Customer service is more than just smile training - -
it's about treating people the way you want to be
treated.*

It's also about giving clients what they want, when
they want it and how they want it.

It really comes down to the fact that good
communication and human relations skills equals
good customer relations.



Understand and Provide



The 'Customer-Centricity Paradox'

- *By focusing on a specific segment of customers, you actually become more broadly successful.*



CUSTOMER RETENTION



Retention for Revenue

- Customer Retention is being perceived as an alternative method of building revenue...it is now a principal source of revenue for services organisations
- It is increasingly difficult to attract good quality business due to ever increasing competition
- Customers are becoming more and more expensive to acquire...it is cheaper to retain the loyalty of a current customer than to acquire a new one



The Need for Customer Retention

- Outstanding companies go all out to retain their customers
- Many markets have settled into maturity with not many new customers entering most categories
- Competition is increasing and the costs of attracting new customers are rising



- Offensive marketing typically costs more than defensive marketing, because it takes effort and time to coax satisfied customers from competitors
- Previously emphasis in marketing was solely on attracting new customers rather than retaining existing ones...on creating *transactions* rather than *relationships*



Cascading the Message:

ALL staff need to be aware of who your top customers are...

- It is very embarrassing for a top customer to walk in and be asked to give his name. He expects to be known, even by most junior staff.
- We cannot afford to recognise all of our customers, but we can make an effort to recognise all our **Top Clients**.
- The present situation is that often we only recognise the frequent visitor



Retention...

is not, of course, simply about staying in touch.

Regular communication may be the vehicle through which incremental sales continue to be made – including the cross selling and up-selling of higher value alternatives to goods already purchased.

For example clever companies assist the renewal of periodic contacts (premiums; term products etc) with well-timed and anti-attrition direct mail and attractive offers designed to head off any chance of the customer deciding against renewal when it fall due.



The key to **repeat business** and customer retention is an **enthusiastic** customer not just a satisfied one.

Quality service...is the service which satisfies a customer needs beyond his/her expectations...*and*



**The most valuable
selling tool
is
yourself**

“A relationship that has been deepened with a needs based approach significantly enhances the probability of retention through increasing value”

On the other hand “a product focused” approach to deepening relationships often destroys value

...when a customer buys a product that he/she will not need and therefore will not use.



Best Advice

Give top customers the full picture...tactfully

...not only in terms of product features and benefits but also conditions, price, product or service limitations...

...stating 'best deal' on offer pays in the medium and long term – ensuring integrity.



Put yourself on the other side
of the desk

Win the customer's confidence...
Through avoiding hard selling...

and
THINKING

“we need to cater for customer needs!”

A customer needs to feel good about
what he/she has
just bought (or not bought)
And how it was offered to him/her



Giving Best Advice to our 'Partners'

*"The customer is truly in
partnership with effective
companies...*

*Every act on his/her behalf
ups the odds for repeat
business, add-on business
and priceless word of mouth
referral."*

Tom Peters



Customer Development

- *Cross-selling related products that increase the customer's success or satisfaction.*



Some Issues:

1. **FRAGILE**: Handle With Tact

We cannot send them over to competition if we have a pricing disadvantage, but we can **emphasise other benefits** e.g. our quality service

2. The **PARADOX**

Try to achieve a balance between giving best advice which may be detrimental to us and doing your best to **retain** our customers. **We must increase sales. We must not hard sell.**



Final Note:

Best Advice may be characterised by a short-term loss of transaction profits...

But long-term gain in terms of improved loyalty and relationship management.



*"In the past 300 years we've managed this
business to suit ourselves.
Now we are managing the business to suit our
customers."*

Paul Barber - Barclays



CUSTOMER RETENTION

THE RULE OF THUMB

FOCUS CONVERSATIONS ON
CUSTOMER'S
REQUIREMENTS AND
IDENTIFIED NEEDS



- OFFER YOUR SUPPORT AS AND WHEN REQUIRED
- OFFER CUSTOMER ADVICE, CROSS-SELLING TO MEET EMERGING NEEDS THROUGH ANTICIPATION..... DON'T LET HIM/HER ASK FOR IT!
- DELIVER WHAT YOU PROMISE...BE COMMITTED TO ACTION NOT LIP SERVICE



- ALWAYS APOLOGISE IF YOUR CUSTOMER IS KEPT WAITING. AN APOLOGY IS NOT AN ADMISSION OF FAULT.
- YOU ARE SIMPLY SORRY FOR THE INCONVENIENCE CAUSED



PUT YOURSELF ON THE OTHER SIDE OF THE
DESK. WIN CUSTOMER'S CONFIDENCE.

AND

THINKING

“WE NEED TO CATER FOR HIS/HER NEEDS”!



Be aware of the 'Churn Rate'

The percentage of customers who stop doing business with a firm; it indicates a failure in centricity.



Myth

“Use relationship skills to get the deal.”

Today's Truth

“The relationship is the deal!”





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Break-Out Work

Case Study: Retaining Clients at Meridian Notarial Services

Background

- Meridian Notarial Services is a reputable firm offering document authentication, certification, property transfer witnessing, and corporate notarisation. The firm has built its reputation on accuracy, confidentiality, and compliance with legal standards.
- Over the past year, however, the firm has noticed a **decline in repeat clients**, especially among small businesses and international clients who previously relied on Meridian for ongoing notarisation needs.
- **Key Characters**
 - **Clara**, Senior Notary and Client Relationship Lead
 - **Evan**, Junior Notary
 - **Mr. Rossi**, Owner of a small import–export business
 - **GlobalTech Ltd**, a corporate client requiring frequent notarisation for cross-border transactions



1. Declining Repeat Business

- Data shows that repeat visits from small business clients have dropped by 25%. Feedback:
- Long waiting times
- Inconsistent communication about required documents
- Limited appointment availability
- A perception that the firm is “transactional rather than relationship-focused”

2. A Critical Incident

- Mr. Rossi arrives for a scheduled notarisation of shipping documents. When he arrives:
- Evan informs him that one document is missing a required apostille.
- Mr. Rossi insists he asked in advance what was needed and was told “everything is fine.”
- The notarisation cannot proceed, causing a delay in his shipment.
- Mr. Rossi leaves frustrated, saying:
- *“I’ve been coming here for years, but lately it feels like you don’t care whether I return.”*

3. Corporate Client Concerns

- GlobalTech's legal team emails Clara:
- They appreciate the accuracy of the work
- But they are considering switching to a competitor offering:
- A dedicated account manager
- Faster turnaround
- Digital reminders for upcoming notarisation deadlines
- They request a meeting to “discuss service expectations moving forward.”

4. Internal Challenges

- Clara is overloaded and struggles to maintain personalised communication.
- Evan is technically competent but inexperienced in client management.
- The firm has no CRM system, relying on manual notes and email chains.
- Staff focus heavily on compliance but less on the client experience.
- Meridian now faces a risk: excellent technical service but declining customer loyalty.



Questions

1. What customer service issues are affecting client retention?
2. How should Clara respond to Mr. Rossi's frustration?
3. What steps can Meridian take to improve customer retention?
4. What indicators would show that customer retention is improving?
5. How can the firm balance legal accuracy with a more customer-friendly experience?



I Was Seduced By Exceptional Customer Service | John Boccuzzi, Jr. | TEDxBryantU

<https://www.youtube.com/watch?v=GH1TXfQSwUQ&list=PLBsUgucNQ8G-IKQu42nMhK1Smp-CrLznc>



Relationship Building Model

TIME



VALUE/
GENUINE
ASSISTANCE

=

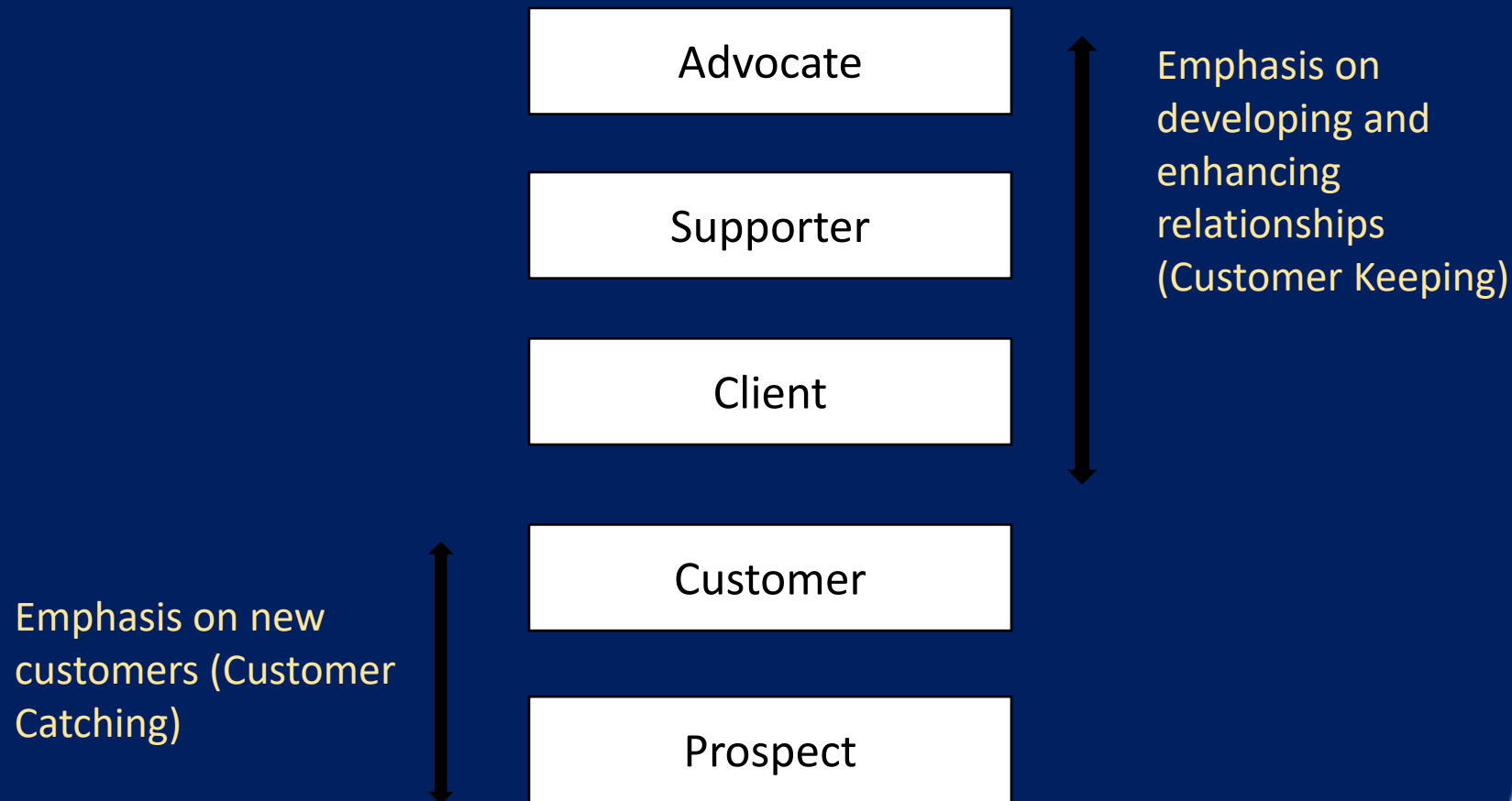
TRUST BASED RELATIONSHIP

=

COMMITMENT FROM BOTH PARTIES

Developing Relationships = Loyalty

The Relationship Marketing Ladder of Customer Loyalty



Activity: Creating Loyalty

Question: *What specific things can be done to create and enhance client loyalty?*



Creating Loyalty

*“Start by making loyalty an explicit objective.
Measure it, monitor it, and plan activities to help you achieve it.”*

- Actively solicit customer suggestions for improvement
- Communicate regularly with regular customers
- Treat complaints as gifts
- Say thank you
- Provide products and services that develop as your customers develop
- Adopt an image that clients like to be associated with
- Reward customers who are loyal
- Access to additional services
- Access to preferential services
- VIP status



Customer Service Excellence

“If a brand is a promise then it is imperative that we deliver on and exceed the expectations of our brand.”



“Do what you do so well that they will want to see it again and bring their friends.”

-Walt Disney

“A leader tells a story about what he or she values from their actions. In the world of customer service we’re on stage all of the time.”



7 Core Values of Client Centricity

“Delivering & Exceeding the promises of our brand”

1. Every interaction with customers (or lack of interaction) tells customers how much they are truly valued.
2. Customer interactions are moments of truth when a customer learns if promises made to them will be honoured or not.
3. Experiences must watch the level of importance/value/meaning of the interaction. That is, a ‘wow’ experience is NOT always required, in fact it might be viewed as wasteful by the customer.
4. In order to create great experiences for customers, organizations must define what they want customers to think, feel, and do at every stage of the customer life cycle.
5. Process must be developed with business goals AND customer experience in mind.
6. Customer experience “failures” are analysed to learn how to create great experiences and value WITH – not for – customers.
7. Communities of customers and prospects are actively fostered and supported, this creates advocates.



4 Customer Centric Service Myths

1. All we need is excellent staff to provide excellent service
2. Service is mainly the responsibility of frontline staff
3. Only customers who buy our products deserve high quality service
4. *“A smile is sufficient”*



Activity: C's of Customer Centric Service

C

C

C

C

C

C

C

C



C's of Customer Centric Service

1. Commitment & Consistency
2. Customer Solutions
3. Concise, Confidential, Courses of Action
4. Communication
5. Competent & Courteous Care
6. Convenience & Comfort
7. Clear, Competitive Cost
8. Cleanliness & Creativity



Four Critical Needs of Every Customer

1. To be understood
2. To feel welcome
3. To feel important
4. To be comfortable



Scenario activity: Managing High-Pressure Situations with Empathy

Emma, a notarial assistant, is helping a client, Ms. Taylor, who urgently needs to notarize a document for an international business transaction.

Ms. Taylor appears stressed, as the deadline is less than an hour away, and she's worried about making mistakes that could delay the process.

As Emma begins assisting her, another client arrives with an appointment scheduled at the same time. Emma must handle both situations efficiently without compromising the quality of service.

Questions:

- What can Emma do to ensure Ms. Taylor's urgent request is handled smoothly?
- How can Emma manage the overlapping appointments while maintaining professionalism and empathy?
- What long-term strategies can the notarial office adopt to manage high-pressure scenarios effectively?





For notarial assistants,
providing excellent customer service
is key to creating a smooth and positive experience for clients
building strong customer relationships and fostering
customer retention.

Here are some tips to keep in mind...



1. Be Friendly and Approachable:

Greet clients warmly, make eye contact, and offer a welcoming smile.
Create a comfortable environment by being calm and patient.

2. Communicate Clearly:

Explain the notarial process in simple, easy-to-understand terms so clients feel confident and informed.

If clients seem confused or have questions, take the time to clarify things without rushing.

3. Be Professional and Respectful:

Maintain professionalism at all times, even when dealing with difficult situations or clients.

Show respect for their time and needs by being prompt and prepared.



4. Be Organized:

Ensure all necessary documents are in order before the appointment to avoid delays or mistakes. Double-check your notary journal and make sure everything is filled out correctly.

5. Maintain Confidentiality:

Always respect client privacy and keep any sensitive information confidential. Reassure clients that their documents and personal information will be handled securely.

6. Stay Calm Under Pressure:

Notarial assistants may encounter stressful situations, especially when clients are in a rush or the documents are urgent.

Keep your composure and stay patient. Provide reassurance if clients seem anxious or in a hurry.



7. Be Knowledgeable and Prepared:

Stay up-to-date on notarial laws and procedures in your state or jurisdiction.

Be ready to answer any questions clients might have, or guide them to the appropriate resources if you don't know the answer.

8. Offer Additional Services:

If your role allows, let clients know about any additional services you can offer, such as document copying, traveling notary services, or legal document assistance.



9 Follow Up:

After the notarization is complete, consider following up with clients to ensure they are satisfied with the service and see if they have any further needs. This builds trust and keeps your services top-of-mind for future notarial needs.

10. Manage Time Wisely:

Respect the client's time by being punctual and keeping the notarization process moving efficiently.

If delays are expected, communicate them promptly and provide alternatives or options.

By practicing these customer service skills, you'll help ensure that clients feel valued and have a positive experience, which could lead to repeat business and referrals!



Case Study: Enhancing Customer Service at a Notarial Office

Background:

- A notarial office, “NotarizeRight,” provides notarization services to individuals and businesses in a busy urban area.
- The office handles a variety of documents, including property deeds, legal contracts, wills, and powers of attorney.
- Despite the growing demand for notary services, NotarizeRight faced significant challenges with customer satisfaction.
- Clients frequently complained about the long wait times, unclear service pricing, and difficulty in making appointments.



Key Issues Identified:

- Long Wait Times: Clients often experienced delays due to walk-ins, overlapping appointments, and the notary's limited working hours. This led to frustration, particularly for clients with tight schedules.
- Unclear Pricing: Many customers were confused by the pricing structure, especially when additional charges for extra services (such as travel fees for mobile notary services) were added without prior notice.
- Lack of Communication: Clients felt uninformed about the progress of their document processing or when there were issues (e.g., a document being incomplete or needing additional verification).
- Inadequate Appointment System: The scheduling system was outdated, resulting in double bookings, missed appointments, and inefficiencies in the office's workflow.



Customer Service Strategies Implemented:

- Online Appointment Booking and Scheduling System: Problem Addressed
- The outdated system and walk-in clients led to inefficiencies.
- Solution: NotarizeRight introduced an online booking platform that allowed clients to choose specific time slots. This helped manage appointments and reduced wait times. The platform also sent automated reminders via email and text, reducing the chances of missed appointments.



- Clear and Transparent Pricing: Problem Addressed: Clients were often confused by the hidden charges.
- Solution: NotarizeRight revamped its pricing structure, listing all charges clearly on the website and in the office.
- They also created a standardized price list for different types of services (e.g., standard notarization, travel notarization, document drafting assistance), which was shared upfront before service was rendered.



- Improved Communication Channels: Problem Addressed: Clients were left in the dark about the status of their notarization process.
- Solution: They implemented a customer service helpline, dedicated email support, and a live chat option on their website.
- This ensured that clients could easily inquire about their documents and receive real-time updates. The office also provided clear timelines on when clients should expect to receive their notarized documents.



- Problem Addressed: Long wait times and limited availability were significant pain points.
- Solution: NotarizeRight hired additional staff during peak hours, allowing them to handle more customers simultaneously. They also extended business hours to accommodate clients after regular office hours and on weekends. This made it easier for clients with demanding schedules to access services.
- Mobile Notary Services: Problem Addressed: Customers with mobility issues or who were unable to visit the office were often underserved.
- Solution: NotarizeRight expanded its mobile notary service, offering on-location notarizations for individuals unable to come to the office. The office provided a streamlined process to book mobile appointments and offered transparency on travel fees, which were calculated based on distance.



Results:

- **Improved Client Satisfaction:** After implementing these changes, NotarizeRight saw a 35% increase in customer satisfaction scores, particularly around wait times and communication. Reduction in Missed Appointments: The online appointment booking system reduced no-shows by 50%, as clients were more likely to remember their appointments due to automated reminders.
- **Higher Repeat Business:** Clients who had a positive experience were more likely to return for additional notarization services. The office saw a 25% increase in repeat clients within six months of implementing these changes.
- **Positive Reviews and Word of Mouth:** The improvements in service quality led to more positive online reviews and referrals. Clients appreciated the transparency in pricing and the convenience of flexible hours.



- Conclusion:
- By focusing on efficient appointment scheduling, clear pricing, improved communication, and expanding service offerings like mobile notary services, NotarizeRight was able to address key customer pain points.
- The changes led to a significant improvement in customer satisfaction, a reduction in operational inefficiencies, and an increase in repeat business.



In summary

What is a



?

- A Customer is a person who comes to us because he/she needs certain goods or services. It is our job to provide them in a way profitable to him and ourselves.
- A Customer is the most important person in the company, whether he/she comes in person, writes to us or telephones.
- A Customer is not dependent upon us... We are dependent upon him/her for our living.
- A Customer is not an interruption to our work... he/she is the purpose of it. He is doing us a favour by giving us an opportunity to serve him.



- A Customer is not someone with whom to argue or match our wits... no one ever won an argument with a Customer.
- A Customer is not a cold statistic. He is a flesh and blood human being with emotions and prejudices like our own.



“WITHOUT THE CUSTOMER THERE IS NO BUSINESS”

What does the Customer want?



- TO BE ACKNOWLEDGED
- TO BE GREETED PLEASANTLY
- TO FEEL IMPORTANT... USE HIS/HER NAME
- TO BE GIVEN FULL ATTENTION
- TO BE ADVISED ON PRODUCT FEATURES - BENEFITS/PITFALLS
- TO SATISFY HIS/HER NEEDS
- TO BE LISTENED TO



- **TO HAVE ACCESS TO YOUR EXPERTISE BUT BE LEFT IN CONTROL**
- **TO BE GIVEN A FAST, FLEXIBLE, CONVENIENT AND EFFICIENT SERVICE**
- **TO FEEL THAT YOU ARE ON HIS SIDE**
- **TO BE THANKED FOR HIS/HER CUSTOM**
- **TO FEEL GOOD ABOUT WHAT HE/SHE HAS JUST BOUGHT...AND HOW IT WAS OFFERED TO HIM/HER!!!**



Always Ask

**HAS MY BEST TODAY
BEEN GOOD ENOUGH FOR THE CUSTOMER?**



**IF YES - Tomorrow MY
BEST will be EVEN
BETTER**



**IF NOT -
WHY?**

4 People named; **Everybody**, **Somebody**, **Anybody** & **Nobody**

“There was an important customer service task to be done and **Everybody** was sure that **Somebody** would do it. **Anybody** could have done it, but **Nobody** did it. **Somebody** got angry about that because it was **Everybody**’s job. **Everybody** thought that **Anybody** could do it, but **Nobody** realized that **Everybody** wouldn’t do it. It ended up being **Everybody** blamed **Somebody** when **Nobody** did what **Anybody** could have done.”



GOOD TEAM-WORK IS IMPORTANT BECAUSE:

- WORK IS DONE MORE EFFICIENTLY
- PRESSURE POINTS AND BOTTLE-NECKS ARE AVOIDED
- THE CUSTOMER RECEIVES TOP-CLASS SERVICE AND IS MADE TO FEEL WELCOME AND SPECIAL



'Single View of the Customer' (SVOC)

Ensure a profile that aggregates all customer interactions across every department and channel so the Team can be in synch.



ENTHUSIASM SELLS

THE KEY TO REPEAT BUSINESS IS AN
ENTHUSIASTIC CUSTOMER NOT JUST
A 'SATISFIED' ONE.



“The benefit of a strong relationship with your customer is that it is very difficult for your competitor to imitate.”

Jules Goddard

London Business School



Quiz: True or False

1. Value in customer service is created only through solving the problem.
2. Influence grows when customers feel you genuinely care about their situation.
3. Authenticity means being honest while still maintaining professionalism.
4. Receptivity includes being open to learning from customer complaints.
5. Compensation is only about financial reward or KPIs.



**Popsicle Moments: Finding A New Flavor of Customer
Service | Darren Ross | TEDxSantaBarbara**

<https://www.youtube.com/watch?v=CfZrgej03As&t=75s>





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