



THE A - Z **OF** SERVICE EXCELLENCE

THE ESSENTIAL GUIDE TO BECOMING
A CUSTOMER SERVICE PROFESSIONAL

*"An excellent guide to not just meeting expectations
but exceeding them, regardless of the business you
are in. A hugely valuable book, wonderfully thought
out and written, and hugely practical."*

— Andrew Griffiths,
Australia's #1 Small Business and
Entrepreneurial Author

CATE SCHRECK



**THE A - Z OF SERVICE
EXCELLENCE**

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Testimonials

One of the biggest challenges facing business today is managing customer expectations. We live in a world that is moving from transactional interactions to meaningful engagement and Cate Schreck gets that. Her new book *The A-Z of Service Excellence* is an excellent guide to not just meeting expectations but exceeding them, regardless of the business you are in. A hugely valuable book, wonderfully thought out and written, and hugely practical.

Andrew Griffiths

Australia's #1 Small Business and Entrepreneurial Author

Cate is a forward thinking developer of skills and initiatives within the customer service arena and she imparts this knowledge with passionate enthusiasm. I have learnt much from Cate in relation to her determination to change the way we traditionally view the implementation of customer service skills and how she empowers employees to know their value in the workplace.

Maryanne Gardiner

Manager – Education Design

Cate is a one-of-a-kind customer service trainer. Her passion for giving individuals and teams the skills to provide consistently superior levels of customer service shows in both her preparation and delivery of service excellence training programs. If you want more customers, less customer complaints and happier staff then I highly recommend Cate.

Paul Steed – Managing Director

apd Australia

Cate designed and delivered a professional behaviours session for our team that was compelling, contemporary and highly relevant. Staff came to me with unsolicited positive feedback and I too was left feeling confident and motivated. Cate has a genuine passion for people working together in harmony in the workplace and her positive attitude is infectious.

**Anita Roseblade – General Manager
Accounting Practice**

Cate is a pleasure to work with as she listens to the needs of the business and adapts her style to suit accordingly. Cate has helped shift the mindset of how we manage and work with others and her knowledge and use of practical tools such as the DISC model, enabled individuals to gain greater levels of self-awareness and help them adapt their working and communication style to suit others.

**Aine Murphy – HR Manager
MAB Corporation**

Cate has provided over 25 fun and interactive workshops for our administrative and clinical staff across Australia. Cate goes to great lengths to understand a business and has the passion, skills and knowledge to deliver customer service skills training in a way that staff at all levels can relate to.

**Craig Pritchard – National Field Development Manager
Back In Motion Health Group**

Cate's positive approach and passion for training is contagious. Her professionalism and determination to deliver exceptional customer service is what makes Cate a dynamic and outstanding trainer, coach and mentor.

Lauren Baird

National HR Business Partner

Cate originally designed and delivered a 'first class customer service' training session for our Vic/Tas franchisees which was really well received. Since then, Cate has delivered further service skills training programs for our growing teams, including those in New Zealand. Cate has an engaging manner and delivers with enthusiasm and passion.

Ross Morley – Managing Director

GJ Gardner Homes Vic/Tas

It doesn't matter what industry you work in and your trailer load of qualifications count for little if you don't possess the skills of communication and engagement. Cate Schreck's training style and mode of delivery assist people to develop both and understand how to use them to the best of their abilities. Cate's visit to our school has allowed staff to better understand their own strengths and how to work better as a cohesive team. "Princess Fiona" as we now refer to Cate, will certainly be invited back because trainers and facilitators with high levels of emotional intelligence and a very full bag of ideas and strategies are very hard to find.

Brian Howley – Careers Manager

Victoria

Having interviewed Cate on my radio program about her training that aims to empower customer service providers, I can say you will not get a more passionate and committed advocate for the benefits of a healthy approach to helping individuals enjoy workplace interactions.

Dr Linda Wilson

Stress Management Specialist/Corporate Wellness Consultant

Cate has been vital in the rejuvenation of the Give Where You Live Foundation's 50th Loaned Executive Program. Cate's wonderful energy and professionalism has made working with her a breeze, and her ability to instil confidence in our participants has resulted in rave reviews from those involved. Cate's generosity and desire to help is outstanding and she has certainly gone above and beyond for our Foundation.

Jessica Young – Business Partnerships Manager

Give Where You Live Foundation

Cate's time with our opportunity shop volunteer teams was inspirational. Engaging our teams, who choose to be with Lifeline to support our life-saving work, can be quite a challenge especially when many volunteers have no previous retail experience. Cate's interactions were respectful and inquiring, building the trust and confidence that encouraged our volunteers to learn, actively participate and have fun.

Meredith Ericson – Chief Executive Officer

Lifeline South West Victoria

About the author

My first customer service job was in a local variety store in a small country town in Western Victoria, Australia. I was 15 years old and employed to work after school on Friday nights and again on Saturday mornings. My role initially was to tidy the store and show customers where products were, but eventually I graduated to the cash register and processing purchases. In my induction to the role, I was told to be bright and friendly and always ask if I didn't know the answer to customer questions. Customer service at this stage was easy: be nice, be polite and ask if you don't know what to do. This seemed like common sense to me – and so began my customer service journey.

The following provides a peek into my career so far and the steps I have taken that motivated me to start Lightbulb Training Solutions and become a Service Excellence Coach.

Climbing the ladder and finding new ladders

After working in the variety store, my next step was into full-time employment. For 18 months I worked as a pharmacy assistant, and then moved on to work in one of Australia's largest banks. The bank provided staff with many avenues for learning both sales and service skills, and over a career of more than 16 years with this employer, I progressed to become a customer service manager, commenced a diploma of business in frontline management and was regularly awarded and rewarded for my high level of service provision. During this time I also discovered my passion for educating and motivating people, and I was routinely appointed to design and deliver internal staff training sessions.

As time went on, however, the banking industry and I were no longer a good fit and I was ready for new challenges. I applied for and achieved a role as a disability employment consultant. My customers now were referred to as clients, and I was also working with their family members, the relevant support services and, of course, their employers. The role required me to gain training and assessment qualifications and I also chose to study a diploma of counselling.

When I applied for this job, I was competing against over 30 candidates, many of whom had previous experience in the disability industry. So why did they choose me? According to my new employer, it was my positive attitude, my clear desire to help others and my professional and confident demeanour. In other words, I had successfully transitioned from banking to disability employment on the strength of my soft skills – or, as I like to call them, my people skills.

I now felt unstoppable. I knew what my strengths were – soft skills – and I knew what I was passionate about – helping people achieve career success. I completed my diploma of business in frontline management and used my Workplace Trainer and Assessor qualification to become a contract trainer and assessor working for universities, registered training organisations and TAFEs. I was soon being contracted to train and assess business and retail qualifications for individuals and businesses of all sizes across Victoria.

Helping people up the ladder

In light of what I had learned so far in my career, and especially while I was providing training and assessment services to various businesses, one thing was clear: specialist customer service skills training available to businesses was lacking. Businesses ached for tailored and

practical customer service skills training that educated and motivated their employees to be better than good. They wanted employees to be customer service professionals. Equally, employees ached for the skills that would help them deal with difficult customers, improve their job satisfaction and help them self-manage stress – and still have energy after work. They wanted to know how to become customer service professionals.

So in 2010, myself and my husband Steve, commenced Lightbulb Training Solutions (LTS). LTS is a specialist customer service training provider that uses a six-step ACTION method to help businesses across Australia create teams of customer service professionals. I love what I do so you, the customer service provider, can love what you do, too.

Author acknowledgements

Thank you to my friends and family who listened to me waffle about this book and also allowed me to say ‘No’ to getting together. ‘I’m busy writing’ must have sounded so lame but my husband, Steve, will confirm that I was completely unable to engage – on any level – when the book decided it needed attention.

To my husband, Steve: every day in every way you remind me it’s okay to be me. You also make me laugh until my sides hurt and I know you would move mountains to keep me safe. I can’t guarantee I won’t write another book but I will – at least for now – stop getting up at 3 am to write and saying the words, ‘Can’t talk – writing’.

To my mum and dad, my brother, Anthony, and my sister, Sue. I’m sure Tim would find something amusing to say about what we have been up to and he would still ruin the family photo with his inability to keep a straight face and keep his hands down. Thank you for always encouraging me to try, always catching me when I fall and always seeing the positive in everything.

I have been totally surrounded by amazing entrepreneurs and people I call my ‘book buddies’ – Paul, Cathy and Mel, in particular. Many more of you have helped and I thank you all for answering my questions, keeping me on track and supplying me with your wisdom. Writing a book can be lonely but not with these people ready and willing to cheer you on.

As research for this book, I have had the great pleasure of interviewing some incredibly passionate customer service professionals from

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across Australia and New Zealand. You all not only gave me your time but also allowed me into your workplaces and proudly gave me your wisdom – and you should be proud. Customer service professionals work hard – often for little or no recognition. I recognise you and I, and all of your customers, thank you.

And then there is you: the person reading this book. Thank you for reading and thank you for wanting to make other people's days just a little bit better. I wish you nothing but success in your career and with your goal to become and remain a customer service professional. You cannot fail.

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INTRODUCTION

Everyone you meet will no doubt have a ‘horror’ story about dealing with a business and their customer service representative. Since you are a customer service person yourself, you know every story has two sides, but in your heart you’d like to think you could have prevented such a horror story ever occurring. Indeed, you’d like to be considered, and regularly complimented for being, an excellent customer service person.

Regardless of the industry you work in, the products or services your business provides, or the age, gender, cultural background, hat or shoe size of your customers, your employer and all your customers want you to be confident, motivated and focused on providing excellent service to every customer, every day.

With over 30 years’ experience in providing customer service across various industries, more than 20 years spent designing and delivering customer service training, and 15 years managing customer service teams, I know what it takes to become a highly valued and consistently complimented customer service person. I call such a person a ‘customer service professional’ – and it’s exactly this person that this book is aimed at.

Defining a customer service professional

A customer service professional is a very special person – and someone who is highly valued in every workplace. Customer service professionals have the skills to interact with people so well that customers and employers alike rave about them for all the right reasons.

Customer service professionals have increased levels of job and personal satisfaction, and lower levels of stress. They know that nothing sells and nothing satisfies like excellent service, and they have a well-stocked ‘toolbox’ of customer service skills, knowledge and experiences so they are prepared to handle every customer service situation – including the good, the bad and the ugly.

To clarify further, here are the top 10 attributes of a customer service professional:

1. They have high-level people skills.
2. They can adapt their communication style to suit and delight every customer.
3. They willingly help other staff provide excellent service.
4. Their customers regularly compliment them on their service.
5. They handle customer complaints with ease.
6. They can be relied upon to represent a business professionally.
7. They are top sellers, because customers willingly buy what they offer.
8. They proactively keep their product and service knowledge up to date.
9. They seek to find solutions to service problems.
10. Their employers want to keep them and keep them happy.

This book is all about offering you insights into how you can become a customer service professional.

Defining a customer

Every business has two types of customers: internal and external. The following sections outline these two types.

Internal customers

These are the people who wear the uniform of the business. They include your co-workers and anyone who delivers a service on behalf of your employer. You provide service to your internal customers – usually referred to as the ‘internal chain’ of customer service. This chain captures the people carrying out tasks that ultimately produce the product or service for an external customer.

External customers

These are the people who choose to do business with you – and are the customers this book is designed to delight. Of course, the term ‘customer’ is not used in every workplace. You might find your ‘customers’ are referred to by one of the following terms:

- attendee
- buyer
- client
- consumer
- guest/visitor
- parent/guardian
- patient
- patron
- prospect/lead
- purchaser
- shopper
- student.

Regardless of the term that is used in your industry, however, the meaning is the same: they are people who need your help to access the products or services your business provides.

For continuity and to minimise confusion, I use the term 'customer' throughout this book when referring to all these types of people.

Who this book is suited to

Whether you are seeking your first customer service role, a new customer service role or have been providing customer service for many years, this book is for you. Indeed, many jobs include aspects of customer service, even if they are not clearly stated in the position title or role description.

Roles that require customer service skills include the following:

- accountant/financial planner
- administrator/receptionist
- advisor/evaluator/salesperson
- help desk operator/support person
- agent/consultant
- aid/carer/support worker/nurse
- beauty therapist/hairdresser/nail technician
- call centre operator
- clerk/teller
- coach/personal trainer
- concierge/maître d'/host
- developer/manager
- officer/representative
- shop or store assistant
- waiter/waitress/wait staff.

If your job title is included in the preceding list, this book is for you. Even if your job title is not included, still consider if you are required to interact with customers. If you do, this book is also for you.

If you have been providing customer service for many years, or even decades, in the same business or across several businesses, you may think you have nothing more to learn. Maybe you have even started to find customer interactions quite demanding, or the idea of a job without customers has become rather appealing. Perhaps you are simply tired of dealing with people.

If you relate to or agree with these sentiments, congratulations for being honest. I too reached a point in my career where the idea of a job with no customer interactions was so appealing that I spent time searching for that job. (If you're inclined to do the same, I'll save you some time here – no job is without interactions with people.)

My customer service journey brought up some serious questions:

- What happened that made me want to consider a job with no people interaction?
- Why, when I am generally a friendly and happy person, did customer service become hard work?
- What changed so that I now find interactions with people the most rewarding and satisfying part of my work day?

All of these questions and more are answered in this book – along with how you can take a similar journey.



If you've lost your passion for providing excellent service, please read on. I was you once and I wrote this book to help you.

How to get the most out of this book

This book contains everything you need to know about customer service – it is an ‘A to Z’, after all. So think of this book just like other reference books (although hopefully not as dry as some reference books can be). You can read the book cover to cover or you can dip into certain areas, based on what you need help with right now. You can also take this book with you on your career journey, rereading certain topics as needed, because the information and skills contained within these pages suit all industries and all levels of customer service. Even if you move out of a predominantly customer service role, you will still be dealing with people and that’s what this book is full of – help with building skills to deal with people.

Every chapter begins with some wise words and I’ve also included what I like to refer to as ‘light bulb moments’ throughout chapters. These are summaries or specific tips or strategies, and are highlighted by a light bulb icon (just like the one a little earlier). I find these quotes and light bulb moments inspiring, and I refer back to them when I need to be reminded that the skills I have are valuable – and that to keep them sharp I too must take the time to refresh them. I hope they provide the same help to you.

So now it’s time to jump in. Pick a topic that you need help with or simply start at the beginning and launch into attitude.



A

IS FOR ATTITUDE

A bad attitude is like a flat tyre;
you're not going anywhere until
you change it.

ANONYMOUS

When was the last time you received amazing customer service? I mean, really amazing. When you were so impressed that you told friends and family, and knew you would happily go back to that business again and again. What was it about the service that was so amazing?

And when was the last time you had a terrible customer service experience? I mean the type that left you so frustrated or angry that you told your friends and family all about it, and vowed to never return to that business. What was it about that experience that was so bad?

Most of the things we assess as excellent customer service are related to the attitude of the customer service provider. Similarly, most of the things we assess as terrible service also relate to the attitude of the service provider.



The good news: your customer service attitude is 100 per cent within your control.

The power of a positive attitude

I grew up in a small country town in Western Victoria and when I went shopping, customer service was almost always provided by someone I knew. So the experience was very much like having a conversation with a friend. Friendly greetings were exchanged, along with pleasantries about family and perhaps a quick discussion about a current event in the town, and then you gave the other person payment for what you wanted to purchase.

When I started shopping outside of my small country town, strangers provided the customer service and that made the interaction a little different. Some strangers were nice and straightaway treated me like a friend, and so the interaction was positive. Others barely looked at me, didn't want to talk to me or were insincere in the way they greeted me. Their service provision made me feel like I was an interruption to their day. Sound familiar?

Can you remember the first time you were a customer and what the experience was like? If you were like me, your first experience as a customer was when buying lollies. I was the kid that stood at the glass

cabinet and asked for, '1 of those, and 2 of those and, no, maybe 3 of those and – how much is that and how much do I have left?' Mixed lollies may indeed be the reason there were so many grumpy customer service providers in the 1970s and '80s. How we were treated in our formative years as a customer may have had an impact on our current expectations of customer service providers, and our perception of whether or not it has a valuable role in society. And everyone tends to remember the negative experiences over the positive ones.

Choosing the right customer service attitude is exactly that – a choice. Every day we make choices. From the moment we wake up we choose what to wear, what to eat, who to associate with and what to buy. Some choices we make without really considering the consequences of the decision. And sometimes that's okay. Choosing to come to work with a negative attitude, however, can definitely have negative consequences. Customer service professionals make a conscious effort to choose a positive attitude every day, because they know how powerful the right attitude can be – not only for them, but also for everyone they interact with.

When you make the choice to be positive, you can look forward to five things:

1. fewer complaints – customers prefer to do business with happy people
2. more sales and/or better business outcomes – customers trust people who can focus
3. reduced stress – customers never complain about genuine smiles
4. increased productivity – co-workers prefer to work with positive people
5. job security – employers want positive and productive staff.

Proving you have a great customer service attitude

Customer service excellence is as much about projecting a positive attitude as it is about your actions. The more positive your attitude towards your role as a service provider, the more positive the attitude you project to your customers. But remember: saying you have a positive attitude is great, but actions speak louder than words.

Here are some examples of a great customer service attitude:

- apologising for a delay or a mistake
- being punctual
- ceasing conversations with a co-worker when a customer needs your help
- ceasing unrelated activities when interacting with a customer
- giving eye contact to a person who is talking to you
- listening without interrupting
- offering a seat for the frail or elderly
- opening the door for people
- refraining from eating or drinking in the view of customers or when talking on the phone
- remembering and acknowledging customer events (for example, birthdays and celebrations)
- saying please when you ask for something
- seeking and using your customer's name
- smiling when you greet people
- thanking customers for waiting
- wearing neat and clean clothes or uniform.

It's important to remember that not all workplaces will deem everything on the preceding list as necessary or, in some cases, possible. To prove

to your employer that you have a positive customer service attitude, ask which items on the list they believe are possible and best suited to the customers of the business. Your employer may also have other ideas to add to the list.

Staying positive when you feel negative

Rude or angry customers, unexpected changes, delays or errors can all have a negative effect on even the most positive customer service providers. This means on some days you will be required to make a greater effort to remain positive, and those are the times when choosing the right attitude will serve you very well. Customer service professionals find when they make a conscious effort to change their own negative attitude, the feedback and thanks they get from customers and co-workers is well worth the effort.

When we choose to remain calm and professional in the tough times, we can effectively help change the mood of those around us as well. Customer service professionals have the skills to handle difficult people, balance the day-to-day demands of their role and still keep themselves and those around them calm. To help them with this, customer service professionals have one unbeatable weapon: a positive attitude.

At times, situations in our personal lives and/or our mental and physical health can have a negative impact on our emotions. There have certainly been times in my career when, no matter how hard I tried, leaving those difficult thoughts and feelings at home was quite a challenge – and not one that I always succeeded in. When those times happen, be clear that your employer would prefer you to disclose your situation. Employers have a responsibility to provide every employee with a safe workplace. One employee who is not able to complete their role safely

or finds it difficult to interact with co-workers professionally can make it difficult for those around them to also remain productive and, in some cases, safe. You also have a duty of care to those you work with, so let your employer know what's going on so they can consider the best steps for the workplace as a whole.



Acknowledging when you need help is a sign of a customer service professional.

Customer service professionals know that when they're not feeling their best, their mood may have a negative impact on everyone they interact with. They also know that faking a positive attitude is hard work, and so sustainable only for a short time. Customers today can pick a 'faker' from a mile away and your co-workers, who know you so well, will easily be able to identify when you're not at your usual positive and service-focused best.

So be kind to yourself and be honest with your employer, and take the time and support you need to recharge your customer service batteries.

Attitude action

Before you start your workday, take a moment to consider how you feel and what attitude you are bringing into the workplace. Customers and co-workers prefer to interact with people who have a positive attitude.

If something negative is on your mind, acknowledge it, write it down if you have to and make a deal with yourself that you will pay it the attention it needs – after work.

Remember that a positive attitude is contagious – go and infect someone today.