

# WHY EMPLOYEES NEED GUIDELINES NOT JUST RULES

BY BILL HOGG

*This is the second in our series of six articles that looks at different aspects of excellent customer service and how it leads to increased overall profitability. The full series will be available for download as a white paper once it is completed.*

In our last article we covered four foundational elements that every employee needs to provide superior customer service. But once we have the foundations of a strong customer-focused employee in place, we need to continue to build on the on-boarding training they receive.

Rules are an essential part of any business. Rules are necessary to ensure we make intentional decisions. Rules are written to make sure people are treated equally and consistently.

While there's nothing wrong with this in principle, there are always going to be situations where a certain degree of flexibility is essential because people are unique. The way they react to situations is also unique and if you're trying to offer great customer service, you have to be flexible enough to respond to their needs.

So, apart from rules that tell an employee what they can or can't do, it's also essential that employees have guidelines as well. These guidelines will provide the boundaries that allow your employees to make decisions for the benefit of the customer -- and the organization -- without having to seek a supervisor's approval every time.

Guidelines enable employees to exercise personal judgment which may mean all the difference between retaining and losing a customer. Customer satisfaction often leads to loyalty which greatly improves the company's overall profitability.

It's impossible to make rules to govern every possible scenario that may occur. When dealing with customers, situations will arise where an employee may have to use some initiative to solve a problem but they can't do that if there's no latitude with regards to the rules they have to follow.

## **Empower Your Front Line**

It's essential that customer service staff are empowered with a certain level of authority. It's pointless if they have to check with a supervisor before making every little decision.

While a company may have a strict policy of no refunds or exchanges without a receipt, there may be times when it's impractical for the customer to provide one. If a strict policy applies and there's no flexibility to allow the employee to use their discretion and bend the rules in such a circumstance, they may lose that client and everyone they choose to tell. However, if a refund, exchange or gift card is granted, the customer would be happy and word of mouth would be positive.

## **Common Sense should Prevail**

Employers should respect and trust their staff to make decisions based on their merit. Often it's these types of quick decisions that will mean the difference between keeping or losing a customer. There are plenty of examples where guidelines would be more appropriate.

If meals are late in a restaurant, offering a bread basket or some free drinks may quell the customer's frustration. A heartfelt apology would also be appropriate. There are times when things don't run smoothly. Perhaps even a

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discount on their total bill may be necessary and the front-of-house staff need to have the autonomy to do what is necessary.

Restaurants regularly replace spilled drinks; their rules might indicate no free drinks but they replace a spilled drink because that's good customer service. The drink doesn't cost much but is worth much more than the cost in positive customer response.

In any customer-focused organization, we must look at the situation from the customer's perspective to discover an appropriate solution. Often, asking the customer what they feel would be an appropriate solution will provide some direction. Experience tells us that when asked, a customer often expects far less that we would be prepared to give to remedy a situation -- so it make sense to ask.

### **Cut the scripted responses**

Have you faced the situation, whether on the phone or in a retail store, of asking questions and receiving responses from staff members that are robotic or scripted? If you ask a question they don't know how to answer, do they seem stuck or confused? Do they just repeat what you have already been told or give you information you never asked for?

If the problem doesn't have a "cookie cutter" response, they can become lost. This is because their training hasn't prepared or empowered them to think for themselves.

Staff should be trained to handle customer service enquiries and provided with specific language that you would like to see used. But not all scenarios can possibly be covered during this training. Although many of their problems are similar, customers and their expectations are unique -- so you can't treat everyone the same way. It's up to the employer and staff to realize there's an unknown human element to dealing with people.

It's imperative that staff understand the rules but they should be allowed to use their initiative where possible -- within the agreed guidelines. Most problems can be solved if someone demonstrates they care enough to understand the issue and look for a solution; even if it requires a slight adjustment of the rules, but still within company guidelines

Without rules, chaos would govern the workplace. There's no doubt about that. However, management must trust their staff enough to establish guidelines with a degree of autonomy/flexibility when it comes to making decisions in the workplace.

When customer service staff takes the initiative, ask a few sensible questions and pay attention to the answers, more problems get solved and more customers leave happier.

Now we understand why customer service staff should have guidelines, not just rules, our next article is going to talk about ***4 Steps to Give Exceptional Customer Service***.

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*Bill is recognized as the **Performance Excelerator™** because of his uncanny ability to create profound change and deliver extraordinary results with the most demanding organizations. He works with senior leaders to inspire and develop high-performance teams that deliver exceptional customer service, higher productivity and improve profits.*

*Bill is passionate about results and works only with clients who share that passion -- ready to take steps to achieve immediate, significant and continuous improvement. Whether working with boards or operations teams and employees, his no-excuse approach breaks down the silos and gains consensus and clarity throughout the organization.*

*Bill Hogg provides dynamic keynote presentations, transformative workshops, and world class executive consulting.*

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