

Appendixes

We would like to offer you some specific examples of real-world communication to employees about service standards and company philosophy. Here are three concrete examples of the way a company's staff can be encouraged to anticipate the needs of their customers. Each was crafted for the company's individual situation and the special relationship it has with its customers. We hope that these examples will spark your own explorations into the art of anticipation.

The *Oasis Disc Manufacturing Customer and Phone Interaction Guidelines and Lexicon Excerpts* demonstrate telephone and in-person customer interaction guidelines, language choice pointers, and general principles in abbreviated form. It is for use by employees with direct contact with the public. This example shows how our principles apply to Micah's business, Oasis, a relatively informal company. It is of an appropriate length to form a tri-fold brochure for easy workplace reference and to be excerpted for even readier reference in pocket form.

The *Capella Hotels and Resorts "Canon Card"/Service Standards and Operating Philosophy* illustrates how a luxury organization with a relatively formal service style distills its service standards and operating philosophy into a brief, portable set of instructions and examples. The card that they're printed on is small enough to accordion-fold and carry in one's pocket. These principles and action points can keep employees

focused on their overall purpose in the organization (the Canon side of the brochure) and the key steps/building blocks for different situations that involve working with customers and with other employees (the Service Standards side).

The *CARQUEST Standards of Service Excellence* is the most concise and least formal example we have provided. It shows how a brief, portable set of principles and action points can be transformative for a company within an informal customer relations context. It is short enough to post at various locations in a workplace.

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Oasis Disc Manufacturing: Customer and Phone Interaction Guidelines and Lexicon Excerpts

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Customer Interaction Guidelines

- **Preferred acknowledgements and greetings**

- "Absolutely"
- "I'll be happy to"
- "Right away!"
- "It will be my pleasure"
- "My pleasure"
- "Thank YOU!"
- You are very welcome!
- You're welcome.
- Good Morning/Afternoon/Evening
- You bet! (but don't over-use!)

- **Discouraged acknowledgments and greetings:**

- No problem! (this is appropriate only when you are trying to convince a customer that they truly haven't inconvenienced you)
- OK!
- Hi.

- **Unacceptable acknowledgments and greetings:**

- Sure.
- Uh huh (and other similar vocalizations)
- Yes? (as a response to a comment by a customer like "Hi. This is Jerv Customer.")

- **There are dozens of better and worse ways to use language.**

MANY times it's truly "not what you say but how you say it." Keep this in mind and choose your words carefully.

Examples of good and bad language:

- Not acceptable: "you owe..."
- Good: "our records show a balance of..." (note: rough collection methods are an EASY way to lose customers).

- Not acceptable: "You need to..."
- Good: "We find it works best if you..."

- **Answering the telephone (external calls):**

- Welcome to Oasis, this is (name), how may I assist you?
- Thank you for calling Oasis, this is (name), how may I help you?"
- Oasis--good morning, this is (name) how may I assist you?
- Oasis--good morning. May I please place you on a brief hold? (caller is in control)

(If you are going to use time-specific greetings, be sure you can get it right not answer "good morning" at 1 PM or "good afternoon" at 10 AM!)

- **Answering the telephone (internal calls):**

- Reception, this is (name), how may I assist you?
- Reception, May I please place you on a brief hold?

- **Apologies:**

- I am so sorry you experienced this problem, please forgive us. What can I do to assist you and make it right?
- I am sorry to hear that, please forgive us! Let me attempt to correct this issue right away.....
- I am terribly sorry, please forgive us. What can I do to help?
- I am sorry to hear that, how can I help?

- **Pleasant Departure:**

- Have a wonderful day, good-bye
- Thank you for working with us today
- Thank you for calling Oasis, good-bye

Telephone Interaction Guidelines

Key Concepts:

- Calling Oasis is a pleasant experience for the caller that adds value for the caller.
- External callers should always experience a three-element response:
 1. *A pleasant greeting*
 2. *A self identification (identify Oasis and the person answering the phone)*
 3. *An offer of assistance*
- The interaction with the caller should be warm, sincere and spirited (full of character)
- We always adjust and conform to the pace of the caller
- Oasis' preferred terminology should be used at all times. However, each person can choose his or her greetings within the guidelines
- Once we are aware of the name of the caller, we use it when possible, within reason. (But do not extend this too far beyond what would be natural in everyday speech.)
- The caller is always in control of the phone conversation.
- Every call is ended with a warm farewell and the use of the caller's name, if possible.
- Internal call standards are consistent (but not identical) with external calls:
 - *Internal callers should experience, at minimum, a self-identification and a greeting, or a self-identification and an offer of assistance. For example.: Good morning, this is Steven! or: This is Steven, how may I help you? Or simply "Hello, this is Steven."*
- **Example 1: (Caller in italics)**
 - Welcome to Oasis, this is Michelle, how may I help you?
 - *Hi. I'd like to speak with Jane...*
 - Absolutely! I'm happy to connect you. While I'm connecting you would you mind if I check your customer information so that we're sure your profile is up to date?
 - *No prob.*
 - [CSR prompts caller to update file]
 - Thank you for helping me with that! Please hold.... (CSR informs Jane that she has a call) Mr. _____, go ahead please.
 - *Thank you!*
 - You're welcome! (Operator disconnects)
- **Example 2: (Caller in italics)**
 - Thank you for calling Oasis, this is Penny, how may I assist you?
 - *Hey, this is Bill Smith, I'd like to speak with Marty....*
 - You bet! I am happy to connect you. While I'm connecting you would you mind if I check your customer information so that we're sure your profile is up to date?
 - *No, I just want to talk with Marty!*
 - Absolutely, Bill! (Operator does not find Marty)
 - I am so sorry, Marty is not answering his line, may I offer you his voice mail?
 - *Can you just tell him to call me at 404 555 1212.*
 - Absolutely. I'll put the message where I know he'll get it. Is there anything else I can do for you?
 - *I'm good, thanks.*
 - You're welcome, Bill... have a wonderful day!
- **The caller is always in control:**
 - No surprises! (e.g. automatic transfer to empty line/voicemail)
 - Agrees to be placed on hold (except momentary hold for connection)
 - No extensive holding of the line (1 minute max without explicit permission)

Call screening, if any, must be done in a way that is completely hidden from the caller.

Never ever ever say "and the purpose of this call is?" "who are you with?" "Will she know what you're calling about?" or other insulting questions. Instead prompt for info as scripted on page 3, or in a faster situation say "You bet--may I get your name so I can pass it on to him?" (Note how this brief, invisible screening includes both a request AND the reason for this request, and the reason must clearly not be that he or she is screening calls).

(NOTE--this is a KEY point. Customers despise having their calls screened, so this wording is critical. You need to give them the feeling that they ALREADY have made it through the screening process BEFORE they are asked to divulge their names; the info you ask for must be requested for professional purposes, not to get them past the velvet rope.

No speaker phone (unless agreed upon)**Wait until the caller hangs up before disconnecting**

Always have "the last word" (e.g., as follows): Caller's in italics:

- Thank you for calling Oasis! This is Steven. How may I assist you?
- *Good Morning...*
- Good morning Steven!
- *.....Could you please connect me with Jerry Seinfeld?*
- I will be happy to! Please hold.
- *Thank you!*
- You are welcome!Jerry is on the line, please go ahead.
- *Thank you!*
- You are very welcome!

Pointers and Pet Peeves

- **How you answer the query “how are you” and “how are you doing?” may set the tone for your entire interaction.**
 - Always respond to “how are you?” with both an answer as to how you’re doing and a query as to how your client is doing. Obviously this is part of the principle to “always have the last word,” but it is such a key point that it is restated here.
 - If asked, always answer with an unequivocally positive response as to how you’re doing. “I’m doing great!” or “Wonderful” or “Super” or something similarly cheery.* The only, rare exception to this is if something truly bad has happened to you and you know the client personally and it seems appropriate to discuss.
 - * (“I’m well” can sound a bit too perfect and make a client subliminally uneasy in our informal business.)
- **Use the following precise wording when transferring to voicemail:** “May I offer you her voicemail?” Also note that some people HATE to be transferred to voicemail. For this reason also consider creative options such as offering to “hand-carry a message to her when she comes back to the office.”
- **Once you have a client on hold: make sure you check back regularly.** If possible, gently encourage client to go into voicemail. If the client insists on holding, apologize for the delay, even if you feel the client is being stubborn. NOTE: Oasis is small. We are mobile. If a note waved in front of someone’s face or an IM to someone in an other office is what’s called for, go for it!
- **Oasis has very few “policies” that are unchangeable. (And “policy” is a word you should never use with a client.)** If you find yourself quoting policy and getting more and more inflexible until you’re backed into a corner, slow down, breathe, and call for backup.
- **Oasis people are not snobs.**
 - We use carefully-chosen language in our scripts only to improve the customer interaction, never to be snooty or excessively formal.
 - We avoid pre-judging people negatively based on superficial impressions. In the music business, it is hard to tell who is “important” and who is not, so we assume everyone has importance to Oasis.
- **Try to avoid the word “No.”**
 - Even if you’re giving a client the definitive (negative) answer, there’s almost always a way to soften the blow: “That’s an interesting idea; however we have a method in place that we find works really well for us. May I go over it with you?” When “no” is the final answer, offering an alternative solution and apology makes it easier to accept: “I’m sorry, Mr. Jamison, although we were unable to upgrade the shipping of your complete project to Madagascar for free, would it help if we ship two boxes overnight at our expense?” (long story short: don’t say the “no” without having a “yes” within the same breath.)
- **Check your voicemail and email.**
 - The only excuse for not checking your voicemail is if you’re involved in some difficult “think” project that requires all your concentration. (This is also one of the only excuses for letting a call go to voicemail in the first place.) When you cannot be in the office, leave an alternate greeting on the phone that addresses this—or check your voicemail frequently during your absence.
 - **In your outgoing voicemail message or when leaving voicemails for other, don’t speed up when you’re saying the digits:** say any numbers or unusual name spellings slowly and always be sure to repeat them! People should be able to write these tidbits down ideally without rewinding the tape or calling back to hear your announcement a second time.
- **There are technical skills involved in using the phone. Learn them!**
- **Last names, extension numbers (or direct dial numbers) and email addresses are “musts”:** use them in your voicemails and emails to make it easy for a client to call you back.
- **Nothing in this document should preclude you from being “real people” on the phone** or even becoming real friends with your clients and prospective clients (assuming you remain protective of Oasis interests).
- **We aren’t just selling a product. We are paying attention: to our clients, their music and their aspirations.** Showing genuine interest in the client’s project is one of the most important parts of your job.

- **If a client or prospect is being rude, always stay polite.**
 - There are those people who are naturally rude (and your attitude won't change that) and those who are so upset they've become rude as a last resort (in which case your attitude can make a world of difference). Remember: stay polite. It's not fair, but it's the way it **MUST** be at Oasis.
- **Even if in public the Oasis customer is always supported, know that you're supported behind the scenes.**
 - Sometimes Oasis has to apologize for things that truly aren't our/your fault--don't think that management doesn't understand this.
- **Never embarrass or contradict a customer.**
 - If they get very angry over something, it is quite likely the next day they will feel badly about how they acted.
 - If they make a mistake, don't point it out to them unless it's absolutely necessary. And then make it seem like an easy mistake that anyone could have made.

CARQUEST Standards of Service Excellence

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Standards of Service Excellence

Our Motto:

*Exceptional Teammates Proudly Serving
a World in Motion*

Our Ambition:

*Providing unparalleled customer service,
innovation, teammate opportunities and
industry leadership*

Our Promise:

A Passion for Excellence



"A Passion to Serve"

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Our Standards of Service Excellence

- Providing unparalleled service is my personal role and the focus of our team efforts.
- I build and sustain customer trust by always demonstrating that I care.
- I am responsible for the cleanliness of our stores, facilities, work areas and vehicles. My appearance, behavior and language reflect our brand of excellence.
- When I see a problem I own it until it is resolved. I am empowered to ensure customer satisfaction and loyalty.
- I build relationships that create customers for life.
- I embrace and foster diversity in teammates and customers.
- I am always eager to assist my teammates by stepping out of my primary role to serve our customers.
- I always conduct myself with strong character and integrity in protecting and elevating the Company name and reputation.
- I am always gracious and treat customers and teammates with dignity and respect.
- I enjoy what I do. I have a warm, happy and caring attitude that creates a pleasant customer experience.
- I am responsible for the safety of my teammates and customers. I conduct myself safely and responsibly in the community I serve.
- I am trained and knowledgeable to provide excellent service to our customers.
- I am prompt, reliable, and responsive. I complete my commitments on time, showing dedication and professionalism. I go beyond my customers' expectations.
- I am a leader. I lead by example and I am a role model at work and in the community. I operate with uncompromising values.

Capella Hotels and Resorts “Canon Card”: Service Standards and Operating Philosophy

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VISION

We are the Global Leader in the service business. Our accomplishments and meaningful contributions have a positive impact on society

MISSION

Our brands, our independent hotels, and our other businesses are recognized as the undisputed leaders in their respective market segments

OBJECTIVES

Keep our existing customers
Add new customers
Optimize the spend of each customer
Maximize efficiency in our service delivery

SERVICE PROCESS

1. WARM WELCOME

Eye contact and smile
Observe

Greet by name whenever possible

2. COMPLIANCE AND ANTICIPATION OF GUESTS' NEEDS

Engage and adjust to the pace of the guest
Fulfill expected and expressed needs

Anticipate
Ask if any other assistance is needed

3. FOND FAREWELL

ZEITGEIST

"The Spirit of the Moment"

We, the Service Professionals of Capella place our guests at the center of everything we do. We provide:

EXCLUSIVITY

A unique, private and luxurious environment that creates a sense of belonging where our guests and residents feel at ease

LOYALTY

Unobtrusive, gracious and unscripted service which enables and empowers our guests and residents to define and fulfill their individual experience

EXPERIENCE

Connections with the local culture and an array of activities along with friendly, respectful, caring and personalized service that is perfectly timed and defect-free

LEGACY

Memories that are meaningful and enriching extending beyond the stay of our guests and residents



CAPELLA™
HOTELS AND RESORTS

CANON

The West Paces Hotel Group is in business to create value and unparalleled results for our owners by creating products which fulfill individual customer expectations.

We deliver reliable, genuinely caring and timely service superior to our competition, with respected and empowered employees who work in an environment of belonging and purpose.

We are supportive and contributing members of society, operating with uncompromising values, honor and integrity.

SERVICE STANDARDS

1. The Canon states the purpose for us to be in business and is shared within the organization.
2. The Zeitgeist is known, owned, and energized by all. It is the cornerstone of our service commitment to our guests.
3. Our Service Process is followed for all guest interactions.
4. We assist each other, stepping out of our primary duties to effectively provide service to our guests.
5. Answer the telephone within three rings and with a smile in your voice. Use terminology that reflects Capella's image. Do not screen calls. Avoid call transfers and placing guests on hold.
6. You are responsible to identify and immediately correct defects before they affect a guest. Defect prevention is key to service excellence.
7. Ensure all areas of the hotel are immaculate. We are responsible for cleanliness, maintenance, and organization. Each hotel follows our established CARE program.
8. Always recognize guests. Interrupt whatever activity you are doing when a guest is within 3 meters (12 feet); greet them with a smile and offer assistance.
9. Safety and security is everyone's responsibility. Know your role in an emergency situation and in protecting guest and hotel assets. Report unsafe conditions or security concerns immediately and correct them if possible.
10. We are all responsible to participate in the elimination of defects in our work area for continuous improvement.
11. When a guest encounters any difficulty, you are responsible to own it and start the problem resolution process. You are empowered to resolve any problem to the guest's complete satisfaction. Follow the CIAF process to properly document issues.
12. Escort guests until they are comfortable with the directions or make visual contact with their destination. Do not point.
13. Always give guests your complete attention and focus. Be responsive, caring and timely in providing service.
14. Be respectful of our guests' personal time and privacy, delivering service that does not interrupt or interfere with our guests' activities. Never approach a guest to request a favor, such as an autograph.
15. The Capella experience is memorable and unique. Be proactive, finding ways to surprise and delight our guests.
16. Be sensitive and adjust to the guests' style, pace, situation and each unique environment to create a personal experience for them.
17. Our appearance, grooming, and demeanor represent Capella. Our attire and personal image are appropriate and impeccable. We avoid words that are inconsistent with Capella's image, such as "hi", "bk", "no problem", "guys", etc.
18. The suggested hours of operation are guidelines, not limitations for satisfying individual guest desires and preferences.
19. We are empowered and required to fulfill our guests' needs. Identify their unique requirements and preferences both prior to the arrival and during their stay in order to individualize their experience.
20. Knowledge is essential to create the Capella experience for our guests. Know all hotel services and signature activities along with local features, history, and traditions.
21. Confidentiality at Capella is paramount. Never speak to the press or anyone outside our company concerning the hotel and guests. If you are approached for information, please notify your General Manager.
22. Be positive both inside and outside the workplace. It is our responsibility to create a great environment and reputation for our hotel and each other.
23. All forms of our written communication (signage, letters, e-mail, hand written notes, etc.) reflect Capella's image.
24. As service professionals, we are always gracious and treat our guests and each other with respect and dignity.

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