



Save9 Limited

## Customer Care Policy

A code of conduct for Save9 staff

Version 2.0 (02.05.2014)

**Save9 Limited**

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# Save9 Customer Care Policy (Version 2.0)

## 1. Customer Care Policy Overview

### 1.1 Purpose

Improved customer service is a key priority (corporate) objective for Save9 Limited and as such it is important that all our staff follow the customer care procedures adopted by the firm.

Customer service is an attitude, not merely a service and it is the responsibility of all staff to ensure they provide the highest quality of service that resource levels allow.

A customer can be anyone who approaches us for support, information or advice. They may also be potential customers (i.e. a sales enquiry), suppliers and colleagues.

The golden rules of Save9 customer care are:

1. Treat customers in a way that you would like to be treated.
2. Never let down a customer.
3. Never let down a colleague.

A customer's experience informs their judgement/perception of all Save9 services, not just the service they have received, so it is very important that when we communicate with customers we are always professional and positive about Save9; that includes all services and all staff that work here.

### 1.2 Customer Care Principles

The following principles form Save9's Customer Care policy:

- Be attentive and courteous.
- Be honest and fair in dealing with customers.
- Respond quickly to requests for assistance.
- Provide services that are fair and accessible to all.

- Set and publish standards for all services.
- Record, monitor and publish compliments and complaints.
- Explain our services and keep a customer informed of what is happening whilst assisting them.
- Ensure complaints are dealt with openly and fairly.
- Actively seek the views of customers and colleagues.
- Review our customer and staff care commitments.
- Share good practice.

Throughout this document the issues raised will relate to these principles. The aim of the principles is to show how we will deliver quality services by adopting consistent minimum customer care standards throughout Save9.

### **1.3 Image and Branding**

When communicating with customers by email, letter or via printed materials always ensure the correct Save9 logo is used. If you are unsure about design, print and logo standards, you should check the company's Intranet. Information about the use of the Save9 logo can be found under 'Knowledge Management' on the company Intranet service. For information about the use of capitals, punctuation, fonts and layout please refer to the Save9 Communication Policy on the Intranet under 'Knowledge Management'.

## **2. What is customer care and why is it so important to Save9?**

We are all responsible for providing services to customers - who are our main source of trading income. These customers require accessible, efficient services and we must strive to meet these demands, adapting services when and where possible to meet individual customer needs.

Customer care means providing a good quality service in a friendly, efficient and helpful way, continually striving to improve services, not least by ensuring good communication and a positive attitude to customers.

Generally customers will request a service from the company. In some instances we may need to be involved with people when they do not particularly want our involvement - for example dealing with an inconvenient technical fault. However, in all our dealings with people, customers have the right to be treated with dignity, respect and courtesy. Where possible we should offer choices and in all cases give information about what is available. If a service is not available, or a customer is not helping to resolve the situation, then a clear and polite explanation must be given.

When delivering information it is essential that we present this information in a positive, clear and easy to understand way.

### **2.1 Save9 Service Standards**

Improved customer service is a key corporate objective of Save9, each team must therefore develop and publicise service standards via their internal Service Delivery Plan.

This should be discussed during the Personal Development Discussion process by all staff with their immediate line manager. Our standards include a service commitment to customers and what customers can expect. These standards should be set following appropriate consultation with customers at regular customer meetings. Standards must include:

- Waiting and response times to telephone calls, support incidents and correspondence.
- Commitments and service standards appropriate to the service provided to your customers – e.g Support SLAs (that may be different for each customer and/or service).
- Reliability and punctuality standards.
- Branding that complies with current standards.
- The correct use of fonts, capitals and specific technical terms. Please refer to Save9 Communications Policy on the company Intranet under ‘Knowledge Management’ – this gives details on the use of capitals, punctuation, fonts and layout.

## 2.2 Procedures

Contact with customers can be in person, by telephone, letter, fax, email, text message (SMS) or through the media.

Note: all communications with the media should be via a director of the company.

Here are some tips on plain written language, particularly useful for explaining complex technical matters in an easy to understand format:

- Stop and think before you write – make a note of the points you want to make in a logical order.
- Imagine you are talking to your reader. Write in a tone and style that suits the reader. It is OK to be sincere and personal - but do not patronise.
- Get to the point quickly – the beginning must be of interest to your readers and give them the incentive to continue.
- Be understood – obscurity, highly technical words, technical abbreviations, Latin, foreign and legal words will not impress readers or help your writing style. Everyday language is more likely to help people understand your ideas or message.
- Do not use technical jargon unless you are absolutely sure your readers will understand it – avoid using overly technical wording where possible.

- Explain any technical terms you use and suffix an abbreviation the first time you use one in a communication – e.g. WAN (Wide Area Network).
- Keep your sentence length down – try to stick to one main idea in a sentence. Use paragraphs and always insert single line spaces between paragraphs so your message is broken down into chunks of relevant information.
- Be direct and accept responsibility – for example, say “I/We will do it” and not “it will be done by us”.
- Be clear – do not waffle or stray from the main point or message. Make sure the words or phrases you use are not vague.
- Promote the right image – send helpful guides and forms.
- Read and check everything you write - is the grammar correct? Does it read clearly? Will the reader understand?
- Always use the question mark symbol ‘?’ at the end of a typed sentence if you are asking someone a question.
- Always use a spellchecker for any written communications – you can save time by turning on your software’s auto-spell checking.

### **2.3 Dealing with Correspondence**

- All correspondence that is not covered by a SLA (Service Level Agreement) must be responded to within three working days. If a full response is not available you must send an acknowledgement to the customer outlining any progress made, why there is a delay and give the name and contact details of who is dealing with the query plus a new timescale for a full reply - ideally within two working days of receipt.
- The corporate style template must be used for all Save9 letters and is available from your ‘Save9 Document Templates’ mapped folder.
- Inconsistent font usage and lack of paragraph-spacing is a typical characteristic of poorly written communications.
- When writing a letter use customers’ names and job titles when known, for example Miss/Ms/Mrs or Mr rather than Sir/Madam. Where you personalise the letter by using a name

you should sign off with “Yours sincerely”. Where you address the letter with Sir/Madam the sign off should be Yours faithfully”

- Avoid jargon, technical language and abbreviations.
- If you are going on annual leave ensure someone checks your letter in-tray for new mail and deals with urgent messages.
- Avoid the use of impersonal standard letters wherever possible – also ‘stock answers’ can give the impression they are being treated as a number; not a valuable customer.
- If a colleague goes on sick leave ensure that you check their in-tray and deal with urgent messages and correspondence.
- Make sure responses are printed to a good quality and portray the high quality image of Save9.

## **2.4 Dealing with Emails**

When sending/replying to an email ensure you adhere to the corporate email policy, attached as **Appendix A**.

Before going on leave, use the out-of-office assistant facility, explaining where help can be obtained whilst you are away. Ensure that you display the dates you will be absent.

## **2.5 Answering the Telephone**

All internal calls must be answered with your first name, for example - “Good morning/afternoon, John speaking”.

All external calls must be answered with “Good morning/afternoon - Save9. How may I help?”.

- Telephones should be answered within ten seconds of ringing (four rings).
- Where you are unable to help the caller straight away, you should take the caller’s name, address and telephone number. Tell the caller when you expect to come back to them, for example within 30 minutes, with a response or, alternatively, ensure that the appropriate member of staff contacts them.
- If you are going to be out or unavailable, make suitable arrangements to deal with telephone queries, for example voicemail (see Protocol attached at **Appendix B**) or diversion of your calls to an appropriate extension in the company.

- Keep a notepad by your telephone and offer to take a message if you are answering a call for someone who is not available or help them yourself if you are able to.
- Try to resist the temptation to interrupt and ask the caller to repeat a message if you do not understand it.
- The company believes that employees should not be subject to verbal abuse and/or threats of violence.
- There will be times when you need to be firm with the caller in order to help them. Be polite rather than aggressive.
- Don't be afraid to say no.

## **2.6 Site Visits**

When making customer site visits, you should always remember that you are representing the company and are expected to remain professional at all times and act in accordance with the Save9 Code of Conduct.

You should also:

- Follow the company's lone working policy.
- Check with the customer that you are in the right place, with the right customer, before proceeding with the purpose of your visit.
- If taking technical notes check with the customer for accuracy and explain why you are taking these notes.
- Offer help if there are forms to explain or complete.
- Reflect and sum up at end of visit - ensuring that the customer is aware of any outstanding matters and proposed action.
- If you are unsure about some things, say so but find out the answer as soon as possible and let the customer know.
- If you are running late, ensure the customer is informed why this is happening and consider offering a revised time. Try not to postpone or cancel visits.
- If you are on sick leave and are able, ask a colleague to contact any customers with appointments to let them know.
- If a colleague goes on sick leave ensure that you check their diary and in-tray and cancel or postpone any appointments as appropriate and deal with immediate appointments, as appropriate.



- Make sure you read any background information, technical documents or correspondence prior to visiting. Find out beforehand if you are likely to need company support services, documentation, equipment, tools or replacements items.

## **2.7 Visitors or customers entering the office**

All staff must ensure that the offices are welcoming and that customers are greeted in a warm and friendly way.

- Remember first impressions are important - be friendly and welcoming.
- Staff must wear identity badges at all times.
- If you have visitors or customers attending site who will be passing beyond the general office areas they need to have a visitor badge issued.
- Ensure wait times are kept to a minimum, maximum wait time should be no more than ten minutes. If this is not possible, explain to the reception team why there is a delay.
- When meeting customers or prospective customers for a group discussion use a private meeting room.
- Make sure you follow up all enquiries and ensure action has been taken.
- Ensure Save9 leaflets/posters/packs for our products and services in the customer waiting areas are up-to-date.
- Offer customers assistance, for example with completing forms.

## **2.8 Complaints, Compliments, Comments and Suggestions**

The company is very keen to hear the views of customers. We are a diverse organisation sometimes dealing with very complex technical issues - so sometimes things do go wrong.

It is our responsibility to listen to customers and apologise if we do get things wrong and take action to ensure such issues do not recur. We also need to listen when people say things are going well or make suggestions about the way we deliver services and where we prioritise services.

Monitoring this information will highlight any problem areas as well as identifying areas of good practice. Conducting surveys and encouraging customers to give us feedback (compliments, comments and complaints) will help customers feel that the Save9 is committed to listening to them.

We must deal with complaints openly. It is important to remember that complaints can be presented as being about an individual member of staff. However, those individuals are acting in their capacity as representatives of the company and therefore on behalf of the company. In most cases it is the action of the company that is being complained about - not the individual member of staff.

## 2.9 Complaints

- Complaints must be acknowledged within 48 hours.
- If possible, deal with complaints 'on the spot'. If this is not possible full responses to corporate complaints must be completed within 5 working days.
- When responding to complaints remember to answer all points raised by the complainant.
- You should record all complaints on the Feedback Log attached as **Appendix C** – available on the SharePoint Intranet. This should be copied to one of the company directors.
- Ensure that you listen to the complainant and check that you have interpreted the complaint correctly. Ask the complainant how they feel the matter should be resolved.
- Customer Feedback Forms are available on the SharePoint Intranet (Please see **Appendix D**).
- Take the opportunity to learn from complaints to improve services. Trends need to be monitored and appropriate action plans instigated.
- Staff often ask for a definition of a complaint, who can complain and what about. A complaint can be defined as 'a dissatisfaction expressed by an end-user or someone on their behalf which needs a response'. More information is available in the complaints procedures.
- Some customers may prefer that their dissatisfaction be dealt with initially as a comment or query. If this happens it should

still be recorded. If people remain unhappy after this process they will, in most cases, still have a right to make a formal complaint.

- Colleagues must follow grievance procedures, where this is appropriate.

#### **2.10 Compliments**

It is equally important that compliments from customers are recorded within the Service Area on the Feedback Log provided at **Appendix C** - again, this should be copied to a director of the company.

#### **2.11 Customer Comments and Suggestions**

Comments and suggestions are a valuable source of feedback on service delivery. These should be recorded and should be included in the monitoring/analysis of complaints figures compiled by team managers.

#### **2.12 Staff Comments and Suggestions**

There is a Save9 suggestions scheme which is available to all staff. This is managed by the managers and directors of the company - assessing suggestions and agreeing those to be progressed. Suggestions can be made via email.

#### **2.13 Equality and Diversity**

We are committed to promoting fairness, equality and diversity. We must ensure equal access to all services for all customers and should be mindful of how services can be offered in alternative forms.

#### **2.14 Physical Design**

Consider the needs of disabled people when arranging meetings. Always consult with a director if you are unsure.

#### **2.15 Common Courtesies for Disabled Customers**

- Treat disabled people as you would treat any other person – as any individual in his or her own right and recognise any special needs.

- Do not assume that an offer of assistance will automatically be welcome. Wait until your offer is accepted. Even then do not assume you know the best way of helping. Instead, request how we may help and listen to any instructions you are given by the expert (the one who receives the assistance).
- Do not ignore a disabled person by talking to them through a companion – the “does she or he take sugar” syndrome.
- Relax, speak normally and stand in front to allow contact to be made, in the same way you would when talking to anyone else.
- Be prepared to sit down or crouch to speak with a person in a wheelchair rather than tower over the person, as this can be intimidating.
- Even when it is the companion you wish to speak to, take up a position so that the wheelchair user, who may be unable to turn, can also join in the conversation and does not feel left out.
- A wheelchair is part of the body space of the person using it - do not lean on it or assume you have permission to adjust the position of a person’s wheelchair.
- However, do not be afraid to make physical contact with a disabled person in the same way as you would with anyone else - for example offering a handshake.

## **2.16 Training and Staff Development**

Recognition of the crucial importance of customer services and the vital role of everyone working within the business has prompted the development of training courses specifically on customer care issues. These courses will support staff in their work. As a matter of course Save9 staff are expected to attend the following courses to keep themselves refreshed in these areas. Courses should be requested from your immediate line manager:

- Customer care induction.
- Conflict management.
- Disability awareness & understanding of blindness/deafness.
- Assertiveness.
- Lone working (where appropriate).
- Complaints procedure (covered at company induction).
- Diversity/equality training.

National Vocational Qualifications (NVQ) training in customer services is available. Employees are encouraged to gain recognition for their level of expertise to a national standard.

## **2.17 Information and Communication**

In order to provide good customer care, employees must be aware of information available regarding Save9 and its products and services. The more knowledgeable you are, the better the service we can provide to customers.

You should know about information relating to our company history, product ranges and services and where to re-direct customers if their need is for an alternative service. The company website at [www.save9.com](http://www.save9.com) has lots of information about our range of products and services.

It is important that Save9 managers pass information to staff and it is essential that a slot is set aside in regular staff meetings for information sharing and technology awareness briefings. It is also the responsibility of all staff to read company policies and procedures and to read material such as newsletters and information sheets.

## **2.18 Consultation**

It is a vital aspect of customer care to actively seek the views of customers to ensure we are meeting their needs – the opportunity to do this at customer meetings and site visits should be taken. Managers should also put in place systems to enable staff to make suggestions about service change and service delivery. It is important that consultation takes place at an early stage. After any consultation exercise it is vital to provide feedback to participants and inform people about any action being taken as a result of the consultation.

## **2.19 Whistleblowing**

Save9 has demonstrated its commitment to the highest standards of openness and accountability with its confidential reporting policy, commonly known as our whistleblowing policy.

This is designed to give employees the opportunity to raise any concerns they may have, directly with a company director, about issues such as unacceptable behaviour, corruption, malpractice or fraud. Such individuals will be given protection from possible reprisals or victimisation if disclosures are made in good faith.

## **2.20 Measuring Performance**

The last few years have seen a substantial increase in the number of indicators that we have to measure our performance against. These are required by the ISO (International Organisation for Standardisation) standards that we are working towards certification for. At times, this may feel overwhelming. However, it is important to remember that the process of auditing our policies and services will enable us to continually improve the business so that our customers receive the best levels of customer service in the industry. In order to do this effectively, all staff are encouraged to contribute to this process.

### **3. Appendix A – Email Protocol**

#### **3.1 Email Protocol**

Any members of staff who will be expected to respond to customer emails need to consider customer expectations and ensure a consistent approach to responses from Save9.

#### **3.2 Speed of Response**

A customer should receive an acknowledgement of safe receipt of their email as soon as possible ideally within 24 hours, with an idea of timescales expected for a full response.

#### **3.3 To, CC (Carbon Copy) and BCC (Blind Carbon Copy)**

Only send a copy to the appropriate persons and take account of 'Out of office' messages. This will mean using 'distribution lists' with care. In the same context, when responding to emails, use the Reply All option sparingly.

A common 'netiquette' mistake when emailing a list of email users who have no relationship with each other is to identify all recipients to each other by not inserting their email addresses into the BCC (Blind Carbon Copy) field of your email message. It is considered a breach of confidentiality by some email users when they discover that their email address is inadvertently made public to other email recipients without their permission. To counter this, make sure you utilise the BCC when sending circular emails of this nature (e.g. multi-customer service downtime warnings).

#### **3.4 Subject**

Always include a brief descriptive subject line - this is particularly useful for ongoing topics and helps prioritise dealing with emails. If the topic changes direction, you can amend the subject detail.

#### **3.5 The Body (of the email)**

Only use the standard Regular, Black, Verdana font, size 10 in the main body of text (excluding the Save9 signature). Other font typefaces that appear attractive to the sender can be

irritating to the recipient. This is a clean and sharp corporate font that will always be readable by the recipient and other electronic systems.

No logos, 'business card' style images, icons etc. should be included in the body of an email. In all cases objects such as photographs and other images, and of course text, can be included in an attachment.

Considerations are:

- Consistency of presentation to our customers.
- Consistency if internal documentation with our electronic document management systems.
- 'Bandwidth' issues and the unnecessary load placed on external network systems.
- Images, icons, etc may not be interpreted and 'seen' in the same format on recipient email systems. Attachments resolve these issues, provided that the applications we use are also used by the customer – please see comments under attachment below.
- Ensure the Caps Lock key on your keyboard is off. A recipient can regard emails sent entirely in capitals as 'shouting'!
- Do not use exclamation marks.
- Ensure the correct punctuation is used at all times. This includes capital letters at the start of a sentence, use of commas, full stops and question marks when asking a question.
- Avoid using jargon and abbreviations.

### **3.6 Salutation**

When responding to a customer enquiry address them by Mr/Mrs/Miss/Ms/Dr or the name they have offered. Then thank the customer for their enquiry. Apologise if it has taken some time to respond and advise them who to contact for further assistance if required.

### **3.7 Save9 email signature**

A standard company Save9 email 'signature' must be embedded in all your emails. Do not attempt to recreate the



company's email signature as it has been specially designed and tested on multiple email systems and will appear automatically in every email.

### **3.8 Attachments**

Be aware that some of our customers do not have high performance networks and messaging servers, so restrict file sizes wherever possible. This may require converting files to another file format or using compression software to reduce file sizes. Compression utility software is rarely 'free' and also depend on the recipient having the decompression software installed. It is quite possible that, depending upon operating systems installed and preferred security settings; certain file types, images, etc will be blocked by the recipient email system.

Do not try to send 'executable' files - .exe. Often Internet Explorer 'files' are blocked and are best sent as a 'link', for example [www.save9.com](http://www.save9.com). Try to restrict attachments to Adobe Acrobat PDF or standard Microsoft document formats wherever possible. It cannot be guaranteed that the recipient uses applications that we use. Adobe Acrobat PDF files are fine if you have the PDF software to create PDFs from other documents and the recipient also has the Adobe Acrobat Reader application. Customers can be directed to the Adobe website for the free Acrobat Reader software. Give the attachment a meaningful file name - particularly important when you are sending more than a single file.

### **3.9 Out of Office Message**

Please make these simple. These are also received externally and reflect upon the company. Nothing light hearted please. For example:

*I am out of the office until Monday 1st January 2016. If you require an urgent response to your email please contact [info@save9.com](mailto:info@save9.com) or telephone <a person> on telephone number 01723 817999 or 0191 4324999. Thank you.*

You can implement a 'rule' that forwards your emails to a colleague but you will need to take care that you are happy for all emails to be forwarded and that the recipient is made aware beforehand. If you need help with setting up these functions, please contact the IT Help Desk in the Save9 Support Team.

### **3.10 Spell Checkingg**

The Microsoft Outlook email application includes an automatic spell checker which should always be used. The text is checked at the moment you hit the send button. Our company 'image' must be protected externally. Poor spelling and grammar gives the impression that you do not place any importance on business communications; the very business we profess to be experts in!

Please ensure the spell checking language is set to UK English in Microsoft Outlook. Again, if you need help implementing this feature please contact the IT Help Desk.

General Issues:

- It is quite possible that internal emails will be read by the public or customers.
- Please do not alter the Microsoft Outlook settings implemented by the IT Support Team.
- Avoid 'Flame' emails – emails that are inflammatory or contain critical messages.

### **3.11 Process and Contact Email Address for Abuse Email**

The company contact email address for informing Save9 about abuse emails is [abuse@save9.com](mailto:abuse@save9.com). Refer to Section 2.3 (Dealing with Correspondence) for advice on response times. Save9 staff must create an IT Helpdesk job ticket for any genuine complaints about email abuse.

If you or a customer encounters something you think might constitute abuse (for example – excess spam or inappropriate content) which you believe has come from our network or systems, please read through the information on this page

carefully. It explains how we should deal with it. This policy covers the following types of abuse on the internet:

- Spam
- Hacking attempts
- IRC activity
- Phishing
- Web space abuse

We work to minimise the amount of abuse that is generated on our servers. Customers can help us by reporting any abuse they spot which they believe has come from the Save9 network.

Please report all abuse by emailing [abuse@save9.com](mailto:abuse@save9.com). Please include as much information as you can about the type of abuse encountered. Please also provide log files (if applicable), URLs for site abuse and email headers for spamming.

Once we've received the customer email, the IT Support Helpdesk will raise a job ticket and investigate the issue thoroughly, contact any relevant customers and work to resolve the issue as quickly as possible.

## **4. Appendix B – Voicemail Protocol**

### **4.1 Voicemail Protocol**

Voicemail is available to all staff, subject to your line manager's approval. When accepting this telephony service, you must agree to adhere to the Save9 Voicemail Protocol below:

1. If you are at your desk, answer your telephone rather than allowing it to transfer to Voicemail.
2. Always ensure that there is an up to date message recorded on your Voicemail service. Changing the message daily is advisable:

*“Hello this is <name and job title> from Save9. Sorry I cannot take your call at the moment. (If you are on annual leave or at a meeting, say so and advise when you will be back). Please leave a message after the tone and I will return your call as soon as possible, alternatively if you wish to speak to a colleague please dial 0 now. Thank you for calling”.*

3. Remember to access you mailbox daily. Listen and respond to messages promptly and delete them once actioned.
4. Each Voicemail user is issued with a detailed guide to using the Voicemail facility. If, however, you do require further assistance, please contact the IT Support Team.
5. You can access your Voicemail box from outside of the company by dialling 01723 817999 or 0191 4324999, \*, extension number and security code.
6. Routine checks are carried out on Voicemail messages to ensure regular message retrieval and for clarity of outgoing messages.



## 6. Appendix D – Feedback Form

### FEEDBACK FORM

Feedback Received from:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Telephone Number: \_\_\_\_\_

Media Type:

Letter	
Email	
Complaint Form	
Telephone	
Web	

Nature of complaint:

Resolution offered:

Handled by:

Staff Name: \_\_\_\_\_

Job Title: \_\_\_\_\_

Manager approval:

Signature: \_\_\_\_\_

Date: \_\_\_\_\_