

How to Get the Right Customer Service Representative

PRESENTED BY

Spencer Frazier - *EVP Sales and Marketing*

Tami Allensworth - *Sr VP of Customer Experience*

What Makes a Great Customer Service Representative?

- Strong Communication Skills
- Analytical Skills
- Ability to Adapt
- Negotiation Skills
- Interpersonal Skills
- Proactive
- Strong Listener
- Solutions Minded
- Forward Looking
- Business Owner Mindset

What questions should a customer ask themselves to identify what attributes they require in a CSR?

- Where does the CSR need to engage?
- Do you want a challenger?
- Personal relationship or business only?
- Communication preference?
- Do you want to self serve?
- What type of work is needed?
 - > Transactional or Strategic
 - > Maintaining or Building?

What questions should a shipper ask their carrier about the process of assigning a CSR during the onboarding process?

- What makes this CSR perfect for your account?
- Does the CSR have experience in their vertical?
- Single Source?
- Training Program?
 - > On-Boarding
 - > Cross-Training
 - > Location Visits
 - > Customer Meetings
- Can They Travel?
- How do they on-board to their company?

How can shippers maintain a relationship with supervisor to give feedback on their CSRs on a recurring basis?

- Establish 3X3 Communication Cadence/Tree
- Jointly created SOP with signoff and review cadence
- Quarterly/Biannual Business Review
- Survey Opportunities
- Lean on them vs Sales
- Be Transparent



How should shippers communicate their expectations of a CSR during the onboarding process?

- Mutually Created SOP
- PIA
- Require Weekly/Monthly/Qtrly Business Reviews
- Define expectations on how CSR shows up to calls/meetings
 - > Data before the call?
 - > What to cover?
 - > Agenda?
- Define after Hours Expectations

Strong CSRs often get promoted. How do carriers ensure there is a pipeline of CSRs that can seamlessly take over their account?

- Understand Retention Strategy
- Hiring Pool
- Multi Level Positions
- Elevate the Role—Destination Job
- Joint On-Boarding



What role do CSR's play in breaking down the silos between divisions?

- Internal Influence Critical
- Joint Business Reviews - Internal
- Easy Button



What You As A Customer Should Expect

- Hiring the Best
- Continual Training
- Joint On-Boarding
- Joint Investment In Success
- Extension of Your Company
- Understand What's Important to YOU!
- Solutions
- Help Drive Out Waste
- *Your Voice Inside Their Company*
- Drive Change
- Understand Your Network
- Continuous CVD/Improvement
- Meet You Where You Are

Questions?



Thank You

