

# Experience Matters

empowering the 50+

*Mike is a recently retired partner of a major accounting firm who now has a portfolio of public and private sector roles where his experience can add value.*

## 'Taking on a new role and how to make it a success'

### Do not forget the obvious

A young person who works in one of the organisations I am involved with asked for some advice. She is taking on a new role and was concerned about what sort of things she should do to make it a success. In response I went through some general steps that struck me as pretty general in making a go of a sale or a new job - creating a satisfied customer or boss.

She seemed to be really appreciative and it struck me that all I was doing was passing on some experience that seemed fairly obvious but worth sharing. I have set out my advice as a ten point plan- I have described it as if the delivery is to a customer but it is more or less just the same with a boss or colleagues as they are internal customers.

1. Clarity about what it is that you are selling or providing. Always sounds a bit obvious but how many times have you as a customer been frustrated because the shop staff did not quite get what it was you wanted? The key here is for you to have a clear vision as to what the customer wants and expects- after all if someone wants a pair of shoes and you are selling mobile phones- do you try and sell them a pair of shoes disguised as a Blackberry?
2. Make sure the terms are clear- what will it cost and what will be supplied for that price? Even in a shop the pricing can be unclear. With a service it can so easily be the case that the customer is in the dark about what it is going to cost and often in the dark about what they are buying as well. How often have you been given a bill and you were not sure the job had been done?
3. Collect all the relevant data. You need to make sure that the customer can be supplied with evidence of what you agreed and what has been done.
4. Use the data collected to ensure the customer is clear about what is

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being done and when and for how much. We all know what builders are like but when we deal with garages or professional firms as customers we expect then to have a correct and complete record of what has been done and to have checked out with us in advance how much it will cost. This is both good commercial sense and good customer relations- you get the variation orders for extra work and keep a regular dialogue going with the customer - always a good thing.

5. Check how things are going. This is not just about asking the customer if things are OK - essential as that is. After all we might be utterly offended these days if a waiter did not check that everything was OK during the course of a meal. It is also doing a self check on how you are doing- asking yourself whether you are doing what has been agreed with the customer.

6. Make sure there are clear payment terms. We are all used to how retailers set out a price and credit terms but when the boot is on the other foot we have to make sure our customers are clear what is due to be paid and when. There is nothing so annoying as being told something is payable when we thought we had more time- it can be embarrassing to customers and suppliers alike and can cause lost future business.

7. Make sure you get paid. Again we are familiar with retailers having much better means of ensuring they get the cash these days through the use of PIN numbers but with services provided on credit I do sometimes wonder if we Brits are too embarrassed to ask for cash. If goods are supplied on credit speedy paperwork and then professional but assertive systems for collecting your cash are as part of excellent customer service as quality. When you have provided the goods or services as agreed, the money due is yours, not your customers just because it is still in their bank.

8. Get feedback on how you did. This is again a basic of customer service and when we have that conversation- that increasingly these days is done on line by say Survey Monkey- we have an opportunity to remind the customer that we care and to find out what we might do better in the future

9. Use all the information we have to debrief the team -or if is just you to ask yourself some basic questions. How did I do? What did I do

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well? What should I have done differently? The purpose of course is to learn so that you do better next time. A key here is actually to share what you find out with the customer either by a newsletter or if you are in a certain kind of business, directly with the customer. This creates customer loyalty and a feel good factor in the team.

10. Last but definitely not least- involve the team in every step reminding them how important they are in creating satisfied customers and to the organisation. All people in an organisation are important in creating satisfied customers. I have a personal mantra here that I learnt from a person called Jack Dash- a firebrand union leader in the London Docks during the 60's- who said there is no such thing as unskilled labour. It is true and can be extended to say that in any organisation there is no such person as someone who does not make a difference to the customer.

Some pretty obvious stuff but my young colleague wrote a lot of it down! I also think these ten steps can be adapted to help you define how you create positive feelings towards you as a work colleague or with your boss because it is plain common sense informed by experience.

Written by Mike Burrows