



## Customer Focus Module Outlines

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# Customer Focus Modules

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## 1. INTRODUCTION

Happy Atom offers two customer focus modules:

- Strategic Customer Focus – for leaders and managers
- Customer Service Excellence – for customer-facing staff

The modules have been designed to complement each other but may be run as stand-alone workshops. Senior leaders may benefit from participating in the Customer Service Excellence module to gain a greater understanding of the issues experienced by customer-facing staff.

The modules are starting points; the content can be adapted and any workshops will be tailored to meet the specific needs of your organisation and wherever possible real-life or organisation-specific case studies and examples will be used.

## 2. STRATEGIC CUSTOMER FOCUS

This course looks at the impact of customer service on the financial bottom-line and how it fits with an organisation's overall strategy. It provides the rationale for leaders to invest time, energy and resources in achieving customer service excellence and participants will learn how customer service is the foundation of sustainable competitive advantage. The module links customer service to shareholder value, branding and culture and sets it within the context of marketing in its widest sense.

The course also emphasises the role leaders and managers have in translating customer focus strategy into practical action through processes, scorecards and people leadership.

### 2.1 Course Outline

- Strategic context – gaining *sustainable* competitive advantage
  - customer focus, culture and brand – how they enable companies to achieve higher margins, retain customers and enter new markets
- Financial context
  - why conventional accounting misleads managers and destroys companies
  - understanding the value of a customer – acquisition, retention, churn and revenues
  - shareholder value and customer lifetime value – the new measures of success
  - how to measure the impact of customer service on customer lifetime value
- Understanding customers
  - customers are not equal – segmentation – the route to excellence and profits
  - how to find out what customers really think, want, need, dislike, feel ...
  - what customers want – physical and emotional elements of products and service

- Moment mapping
  - defining and understanding the customer touchpoints throughout the organisation:
    - across different departments: sales, accounts, service, complaints etc
    - through different channels: face-to-face, telephone, email etc
    - in different circumstances – new purchase, upgrade, question etc
  - identifying improvements at every touchpoint
  
- Culture and brand
  - developing appropriate attitudes and embedding customer excellence in the culture of the organisation
  - brand – “it’s not about advertising, it’s what your employees do” – how to align branding messages with how customer-facing staff behave; how to ensure that everyone “lives the brand”
  
- Making it happen
  - understanding and overcoming barriers – attitudes, processes, resources
  - translating customer focus strategy into action through processes
  - scorecards – identifying key measures and performance drivers throughout the organisation, from senior leaders to customer-facing staff and developing initiatives and targets
  - creating a systematic approach, including sharing of customer data across the organisation



**Strategic Customer Focus**

**Making It Happen**

**Culture & Brand**

**Moment Mapping**

**Understanding Customers**

**Strategic Context**

**Financial Context**

overcoming barriers

processes

key performance drivers

measures

cascaded

scorecards

systematic

developing

embedding

attitudes

dimensions of brand

living the brand

brand

defining

understanding

customer touchpoints

departments

channels

purpose

customer touchpoints

identifying improvements

segmentation - the foundation of excellence

understanding what customers think, want, need, dislike, feel

physical and emotional elements of products and services

sustainable competitive advantage

customers as assets

deficiencies of conventional accounting

understanding the value of a customer

shareholder value

customer lifetime value (CLV)

impact of customer service on CLV

acquisition

retention

service

churn

revenues

## 3. CUSTOMER SERVICE EXCELLENCE

This module will help customer-facing staff to deliver service that creates the “Wow-factor” and leads to customer delight rather than mere satisfaction. The course is extremely practical and focuses particularly on building and managing relationships with individual customers.

### 3.1 Course Outline

- Perception is all
  - there is no such thing as reality – what participants think and believe has an impact on how they treat customers
  - questionnaire to identify participant’s own style and how it may impact relationships with customers
  - managing customer perceptions
- Understanding customers – personality
  - what do customers *really* want
  - the impact of personality on customer wants and matching service to personality
- Understanding customers – emotions
  - emotional intelligence – recognising, understanding and managing our own and customers’ emotions
- Essential communication skills
  - building trust and credibility
  - how to gain empathy – active listening
  - the power of questions, paraphrasing and summarizing
  - body language – gestures, matching and pacing
  - voice – tone, emphasis, volume
- How to say “No”

- Dealing with difficult situations
  - allowing the customer to vent
  - staying calm
  - empathy
  - reframing and taking control
  - active, mutual problem solving
  
- Influencing skills
  - moving beyond logic
  - Cialdini's six principles of persuasion and how they can be used to win over customers
  
- Making it real
  - transferring learning to their jobs – committing to positive action



## 4. HAPPY ATOM CREDENTIALS

Paul Taylor is an accredited facilitator on the Ericsson Leadership Core Curriculum (LCC). The LCC is a comprehensive leadership programme comprising 3 dimensions:



- leading self – personality (DiSC), values, personal effectiveness, trust
- leading others – Blanchard’s Situational Leadership II, coaching, leading teams
- leading the organisation – leading change, innovation, performance management

Paul has worked with Ericsson since 1997 and in 2008 has been the lead developer on a new version of the LCC for “Individual Contributors” (key staff without direct reports) that emphasises influencing skills. He has worked in over 15 countries for Ericsson, including Egypt, Turkey, Romania, Sweden and Lebanon. He is currently involved in the development of a Senior Leaders program and regularly delivers a series of two-day courses on finance, strategy and customer focus.



Paul has also worked extensively with Virgin Media, developing and delivering a programme of modules ranging from Customer Focus and Implementing Change through Leadership Communication to Leading Teams and Financial Awareness.

Other recent projects undertaken by Paul include:

- developed and delivered a flexible leadership programme for Bausch & Lomb
- measuring marketing effectiveness workshop for Cisco
- influence and negotiation skills courses delivered for Akzo Nobel, Maersk and Philips
- strategy workshops for Rajawali senior managers in Indonesia
- marketing finance courses designed and delivered for Centrica (British Gas)
- leadership program designed and delivered for UK television station, five
- marketing courses designed and delivered for EDF Energy
- finance course for senior managers at Gulf News in United Arab Emirates



- strategic management courses designed and delivered for Oxford University Press
- living the brand workshop for the British Council
- presentation skills courses for Barnett Waddingham and Ericsson

## 4.1 Differentiators

Happy Atom is different from other training providers:

- extensive knowledge and experience delivering **both** soft skills training and workshops focusing on strategy, marketing and finance. This means that our soft skills courses are always set in the context of improving business performance and sustaining competitive advantage, whilst our hard skills courses emphasise the importance of people, culture and the role of leaders.
- customer service programmes run with blue chip clients, including: Ericsson, Virgin Media, British Council and May Gurney.
- experience across a wide range of different industries, markets and cultures enables us to provide new approaches and help managers to break free of old paradigms. Technical training benefits from industry specialisation; leadership and strategic thinking requires a much broader perspective.
- our Learning Management System (LMS)<sup>1</sup> greatly increases your return on investment. It provides participants with knowledge prior to training so that expensive classroom time is spent on the practical application of knowledge and techniques. Following workshops, knowledge and skills are embedded via continued access to the LMS – summary reminders of key principles, new articles, interactive multimedia content etc.
- a further benefit is that the LMS can be used to evaluate learning through quizzes, case studies and questionnaires, with results analysed and used to justify investment in training and to provide feedback for future training development.
- WYSIWYG – what you see is what you get – unless discussed and agreed in advance, the facilitator will be Paul Taylor.

## 4.2 Paul Taylor

- MA in law, Oxford University
- MBA, City University, London
- Member of the Chartered Institute of Marketing
- Member of the Institute of Management Consultancy

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<sup>1</sup> The LMS simply requires internet access. It is hosted on Happy Atom' server. No software of any kind is installed on client computers. (Acrobat Reader for PDF articles and Adobe Flash Player for multimedia presentations are required; both of these are usually installed as standard on most PCs.)

- Blanchard Situational Leadership II, DiSC and Profilor 360 accredited

Paul first worked in sales and marketing for the largest UK telecommunications company GPT (later Marconi) and then Boeing. Following his MBA he moved into consulting for a number of years before becoming the Business Marketing Manager for London Electricity (LE). At LE, he was responsible for developing the competitive strategy as the UK energy market was liberalised. This period of intense activity saw Paul involved in: brand development, managing culture change, financial projections and managing a team of marketing professionals and a multi-million pound marketing budget.

Having successfully managed the transition of LE into the competitive marketplace, Paul returned to training and consultancy and established Happy Atom.



Paul Taylor with Ken Blanchard (chairman of the Blanchard organisation and author of the One Minute Manager books) and Joselito Rivera, Director of Ericsson LCC