

# SERVICE REP

# RALPH

## GET TO KNOW HIM:

Ralph acts as one of the faces of a medium size organization. He fields issues and corresponds with customers and clients every day. Each interaction is much different, so he's learned how to adapt to every unique situation.

Helping customers is rewarding, but he can burn out from time to time. He's eager to learn and grow in his department, and he knows the best way to do that is by further developing vital skills, like conflict resolution, communication, and time management.

He reports directly to management, and his team regularly help each other with specific customer inquiries.

## TITLES:

Customer Service Representative, Front Desk Agent, Guest Service Agent, Support Specialist, Member Services Representative, Customer Support Representative, Customer Service Specialist, Customer Support Specialist, Customer Success Associate

## LOCATION/MARKET:

Customers living in the U.S. and other English-speaking regions (e.g., Canada, UK)

## INDUSTRY/COMPANY SIZE:

Healthcare, Manufacturing, Technology, Travel/Real Estate, Services, Financial, Education

10-500 Employees



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## PAIN POINTS & CHALLENGES:

- Resolving conflict with unsatisfied customers.
- Finding time to manage various customer accounts and keep documents up to date.
- Understanding performance reports and identify areas they can improve.
- Learning new technologies introduced by service leadership.
- Delivering reports on customer data to other reps, management, and senior leadership.
- Staying engaged and motivated in the day to day.
- Streamlining the customer orientation process so they can learn fast and experience less obstacles in the future.
- Boosting the NPS score to turn customers into advocates.
- Staying informed on other KPIs, like customer engagement.
- Handing off cross-sell and upsell opportunities to sales.
- Breaking down silos between service, sales, and marketing.
- Achieving their performance goals, like ticket response time.
- Encouraging customers to complete feedback surveys so the team can find ways to improve the customer experience.
- Keeping tickets organized to ensure all issues are addressed in a timely manner.
- Staying engaged on customer forums.
- Handling common service errors, like dropped calls, poor live chat UX, etc.

## WHERE HE SEEKS KNOWLEDGE:

- Blogs
- Podcasts
- Books
- Online courses

## OBJECTIONS:

- No buy in from management.
- Unfamiliar with inbound service.
- Not interested in learning a new program like HubSpot.
- Not enough time to learn HubSpot.
- Bad experience with previous agencies.

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## GOALS:

- ✓ Maintain accurate customer accounts to ensure comprehensiveness.
- ✓ Resolve problems with products and services in a timely, effective manner.
- ✓ Collect and analyze customer data to look for upsell and cross-sell opportunities.
- ✓ Keep informed on product and service offerings to ensure accuracy.
- ✓ Use communication and conflict resolution skills to keep customers satisfied.
- ✓ Conduct customer feedback surveys to find where to improve the customer experience.
- ✓ Deliver reports to service management.
- ✓ Manage incoming calls, chat conversations, emails, and other communication channels.
- ✓ Build positive rapport and maintain great relationships with existing customers.
- ✓ Manage documentation and contact properties to stay organized.
- ✓ Provide effective customer orientation to get new customers up to speed on products and services.
- ✓ Collaborate with content team to build a comprehensive knowledge base.
- ✓ Engage customers in online community forums to provide solutions and helpful information.
- ✓ Learn how to use new technologies to streamline their process.

## MARKETING MESSAGE

Bluleadz is the world's first inbound agency, helping organizations fully implement the inbound methodology throughout marketing, sales, and service to fuel sustainable business growth.

Inbound service helps you attract existing and future customers, engage current customers' to solve their issues, and delight them to boost customer retention and activate them as advocates. Our team is here to guide your service team members through each step, from learning the HubSpot service hub to building effective service strategies based on the latest best practices.