NUTS: Southwest Airlines Blog

"Being Proactive—The Next Generation of Customer Service"

Part Two—Proactive Customer Service Basics

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(In the first installment, I outlined the need for Proactive Customer Service. Now, we will drill down a bit deeper to review the basics.)

Stay Informed

There's no excuse for not being prepared.

Understand how our business process works. I'm not talking about breaking it down to the chemical elements or physics, but a good understanding of our Company's Mission, principles, and goals; department structures and purposes; and how the Players, Teams, and Departments fit into the mix makes a big difference in the way we work together to resolve any situation.

Be aware of the circumstances that could interrupt our operations and where to turn for information if a disruption occurs.

Be prepared to implement a contingency plan (whatever that may be) if things don't go according to plan.

Take Ownership

Approach every situation like you are the last beacon of hope.

Be empowered to do everything you can to resolve a situation on your own. If others are called on to help implement a gameplan, then it's imperative to make sure they follow through.

Take the opportunity to turn a negative into a positive.

Find Win/Win Solutions

Trust that you'll do the right thing.

Try to make decisions as if you are in the Customer's shoes. Always listen to learn what the Customer wants (sometimes you have to have a thick skin in order to see through disappointment and anger). Be open; let the Customer down gently if you have to be the bearer of bad news; and always tell them what you can do (even if they're not the most flattering options).

Think about the Company's rules and policies as starting points (they're not the end of the road unless they have to be). And, be very flexible (as long as you're not jeopardizing Safety, security, or our Fellow Employees' integrity).

Followup Reporting

Taking ownership of a situation also means you have to report it.

Timely reporting is a key element to jumpstart the awareness of an event. Always keep your Leaders (on your Team and those to whom you report) in the loop (via whatever means necessary: phone calls/messages, e-mails, hand-written notes, and what have you). This is when being a pest is a good thing (even with the small stuff).

Keep all Teammembers and Key Contacts in other departments who might encounter the same person/situation clearly informed about the facts so everyone is on the same page. Be positive; lighthearted; logical; and quickly get to the point. Provide followup information if necessary.

Without going into the details of effective report writing (that could be a separate blog by itself), here are some "rules of thumb":

- Bullet point and timeline formats (when fitting) quickly outline the facts.
- Be sure your report includes the date, time, location, name of the people involved, and a brief description of how you participated in what took place.
- Include your subjective opinion if it helps the reader understand the Customers' reaction to the situation.
- Always promote your Team's positive efforts.
- Be open/humble about your pitfalls.
- And, make sure you note what corrective actions are being taken (if necessary) on your end.

(*In Part Three, I'll share with you what I think are the key elements of effective proactive communication.)*