

CUSTOMER SERVICE PROGRAM TEMPLATE

New Hire Information

- **Role:** *[Enterprise Customer Support Specialist]*
- **Manager/Reporting To:** *[Name]*
 - **Email Address:** *[name@company.com]*
 - **Phone Number:** *[000-000-0000]*
- **Department Head:** *[Name]*
 - **Email Address:** *[name@company.com]*
 - **Phone Number:** *[000-000-0000]*
- **Coach/Mentor:** *[Name]*
 - **Email Address:** *[name@company.com]*
 - **Phone Number:** *[000-000-0000]*

Welcome to the Team!

[Write an introductory message that ignites excitement for this new hire in joining your company. Clearly state that this is not a contract nor a full list of their expected tasks. Rather, explain that this is a collection of resources that will walk the new hire through the onboarding and training process, and guide them through long-term success in their new role.]

What You'll Learn in This Course

[Write a brief description of each of the main topics outlined in this course, including the following:]

- **Who We Are**
- **Customer Profile**
- **Customer Service Etiquette**
- **Channels We Use**
- **Our Policy**

Let's get started!

Who We Are

[Optional for digital format: You can add a video of your key leader explaining the great things about your team, their own vision and philosophy, and why they are proud to be leading this group.]

Our Team Structure

[Introduce your customer service team structure and let the new hire know that you are excited to have them on your team. Assure them that they will be well acquainted with the names of their new team members over the next few days.]

[Insert organizational chart here]

Our Vision

[Add a vision statement that clearly describes the type and quality of service that you want to deliver to your customers at present and in the future.]

Our Philosophy

[Add a customer-first philosophy that inspires your team members to adopt a proactive rather than a reactive approach to customer service. Provide a brief description of each of the elements enumerated below.]

We Believe In:

1. Respect
2. Understanding
3. Listening
4. Responding
5. Serving

Recap: Who We Are

[Add flashcards that summarize the things discussed under “Who We Are”]

Test Your Knowledge

[Create three to five questions about the main points discussed under “Who We Are”]

Customer Profile

[Optional: Add a video of the head of your customer service team explaining the importance of understanding your customers.]

Demographics

[Fill out the template below to define your customer demographics]

- Age
- Gender
- Level of education
- Occupation
- Address
- Marital status
- Other details

Psychographics

[Fill out the template below to define your customer psychographics]

- Common concerns
- Motivations
- Goals
- Frustrations
- Other details

Recap: Customer Profile

[Add flashcards that summarize the things discussed under “Customer Profile”]

Test Your Knowledge

[Create three to five questions about the main points discussed under “Customer Profile”]

Customer Service Etiquette

[Add a video of a key company leader educating your team on the importance of customer service etiquette in delivering high-quality customer service. Provide details for each of the elements outlined below.]

General Elements of Basic Customer Service Etiquette:

- Transparency about your products and services
- Support assistance
- Customer feedback
- Active listening
- Gratitude toward customers
- Professional attitude

Recap: Customer Service Etiquette

[Add flashcards that summarize the things discussed under “Customer Service Etiquette”]

Test Your Knowledge

[Create three to five questions about the main points discussed under “Customer Service Etiquette”]

Channels We Use

[Orient your employees on the different support channels that your organization uses and provide details for each channel listed below.]

Our Communication Channels:

- Phone
- Live chat
- Email
- Social media (Facebook, LinkedIn, etc.)

Recap: Channels We Use

[Add flashcards that summarize the things discussed under “Channels We Use”]

Test Your Knowledge

[Create three to five questions about the main points discussed under “Channels We Use”]

Our Policy

[Add a brief overview of your customer service policy to guide the new hires on how to ensure customer success. Include details of your customer service policy playbook below.]

Customer Service Policy Playbook

Product Overview

Purpose

Policies

- Return policy
- Reimbursement policy

Communication

Recap: Our Policy

[Add flashcards that summarize the things discussed under “Our Policy”]

Test Your Knowledge

[Create three to five questions about the main points addressed under “Our Policy”]

Thank You!

[Add a closing statement thanking your team member for participating in this training.]

Chapter Feedback

[Add a customized Customer Service Team course survey to check your learner engagement and feedback.]