


Welcome to...

Creating Positive Client Interactions


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Purpose

- In this training you will learn about ADP service culture and how to deliver exceptional service including managing the client experience and managing the service transaction.

How You Will Learn




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graph LR; Tell --> Show --> Do --> Review
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Agenda

- The agenda for today's course is:

MODULE 1 | ADP Service Process & Strategy

MODULE 2 | Delivering Exceptional Service

MODULE 3 | Selected Recorded Service Calls

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MODULE 1 |
ADP Service Process & Strategy

Creating Positive Client Interactions



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Module 1 | *ADP Service Process & Strategy*



This module includes the following topics:

- ADP Service Process
- Service Strategy
 - Understanding the Use of Time
 - Guidelines for Client Hold Times
 - Service (OODA) Loop
 - Service (OODA) Loop Activity
 - Contact and Available Service Options



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Introduction



ADP SERVICE PROCESS



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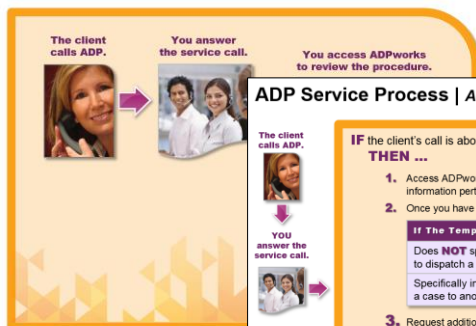
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ADP Service Process

ADP Service Process | No Additional Support Required



ADP Service Process | Additional Support Required

- IF** the client's call is about any product or feature where you require assistance ...
THEN ...
1. Access ADPworks and refer to the template within the solution to gather the information pertinent to the case.
 2. Once you have gathered the relevant information:

If The Template in ADPworks ...	Then ...
Does NOT specifically instruct you to dispatch a case to another queue	Go to step 3.
Specifically instructs you to dispatch a case to another queue	Dispatch the case and go to step 4.
 3. Request additional support by:
 - Sending a Lync message to your team (via your team's daily Lync chat)
 - Contacting a Service Support Specialist (SSS) (via Lync or the SSS Tech Line)

If you do not get a response from either a team member or an SSS, then dispatch a subcase as directed by your service center.
 4. Tell the client you will research the issue and get back to them.

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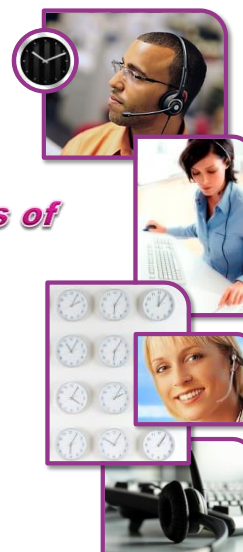


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Service Strategy | Understanding the Use of Time

- To maximize your "available" time, you are expected to work and close cases between calls and during your scheduled off-hook time.

What are some of the benefits of closing cases between calls and during off-hook time?



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Service Strategy | Guidelines to Assist with Handling Client Hold Times

Techniques to assist you in managing client hold times:

- Always ask the client's permission if you can put him or her on hold; wait for the client's response; and attempt to return to the call within two minutes or less.
- Periodically update the client while he or she is waiting and never put the client's call on mute. Upon returning to the call, thank the client for their patience.
- Reassure the client that you are working on their issue and provide an estimated time of resolution.

ACTIONS TO TAKE TO REDUCE DEAD AIR TIME

- ✓ **Make Small Talk** | How are you doing today?; How are things in New Jersey today?
- ✓ **Tell the Client What You're Doing** | I'm checking my system to see if your payroll has processed.
- ✓ **Use Your Best Judgment** | Quickly determine if the issue is something you can handle on the call in a timely manner.
- ✓ **Engage the Client in the Decision** | This will take me a few more minutes. Would you like to hold, or may I email you a response?



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Service Strategy | Service (OODA) Loop

Observe
Orient
Decide
Act



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Service Strategy | *Service (OODA) Loop Activity*

OBSERVE

ORIENT

DECIDE

ACT

Service Loop Segment	Description
	<ul style="list-style-type: none"> You inform the client you need to research the issue and will call him after his meeting. You contact the SSS tech line for assistance.
	<ul style="list-style-type: none"> You contact the SSS via phone and let the client know you will get back to him.
	<ul style="list-style-type: none"> You have not been trained on supporting Time Off inquiries and cannot locate the answer in ADPworks. The client doesn't have time to wait on hold while you track down the answer.
	<ul style="list-style-type: none"> John needs some assistance with troubleshooting a Time Off issue. It's 12:15 PM and three of your team members are at lunch. All of your remaining team members are on the phone and you only have 15 minutes before you need to attend a meeting.

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Service Strategy | *Contact and Available Service Options*

METHODS TO CONTACT ADP

phone

email

internet

fax

WHAT TO DO WHEN WORK ARRIVES?

A 1st Contact Resolution

- ▶ Handle the inquiry; close the case
- ▶ You know it, you own it

B Create + Dispatch

- ▶ Inquiry limited in scope
- ▶ Use template

C Create + Hold

- ▶ Team-level casework
- ▶ Use template

D Obtain Assistance

- ▶ Place the client on "hold"
- ▶ Find someone to assist you

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Review | *ADP Service Process & Strategy*



This module included the following topics:

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 - Understanding the Use of Time
 - Guidelines for Client Hold Times
 - Service (OODA) Loop
 - Service (OODA) Loop Activity
 - Contact and Available Service Options



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MODULE 2 |
Delivering Exceptional Service

Creating Positive Client Interactions

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Module 2 | *Delivering Exceptional Service*



This module includes the following topics:

- Strategies to Deliver Exceptional Service
 - Managing the Client Relationship
 - Take the Initiative
 - Be Positive
 - Make the Client Feel Special
- Strategies to Deliver Exceptional Service
 - Managing the Service Transaction
 - Seamless Service
 - Seamless Service and ADP Workforce Now
 - Multi-Product Service Issues | Warm Transfers
 - Proper Transfer Procedures
- Call Scenario



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Strategies to Deliver Exceptional Service

- To deliver outstanding service on each and every client interaction, you must manage ...



NOTE: The strategies presented in this section are from *Service Excellence!* by Price Pritchett.

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Managing the Client Relationship

- What experiences have you had where a service representative **USED** or did **NOT** use these strategies?

1. Take the Initiative

2. Be Positive

3. Make the Client Feel Special



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Take the Initiative

- Make the first move – take the lead – be proactive.

The best defense is a good offense!

- Taking the initiative can assist in:
 - Influencing behavior early on
 - Acquiring a strategic advantage
 - Guiding actions in a preferred direction
- To act or react?
 - Hesitation = having to react
 - Reacting is a common mistake.



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Be Positive

- You have three options on how you can behave:
 - ✓ **Positive:** Optimistic, friendly, supporting, attentive, courteous, and caring
 - **Neutral:** Indifferent, dull, matter-of-fact, unremarkable, or detached
 - **Negative:** Unfriendly, difficult, defensive, unpleasant, annoyed, or impolite
- Being positive/staying optimistic:
 - Gets, and keeps, the relationship moving in the right direction
 - May not be easy for each and every interaction – each and every day
 - Involves some leniency – especially when the client is mistaken



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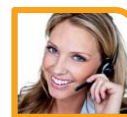
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Make the Client Feel Special

- Make each client feel preferred. Provide such incredible service that you literally amaze the client.
- Go beyond what is required. Give the client more than he or she anticipates in the way you relate and the service you provide.

Provide the client with a positive defining moment!

- This is easier to accomplish if you approach each and every client as if he or she were your only client, as if this were a person you must become familiar with, delight, and keep satisfied.
- In some circumstances, managing the client relationship may be the only way you can really shine.



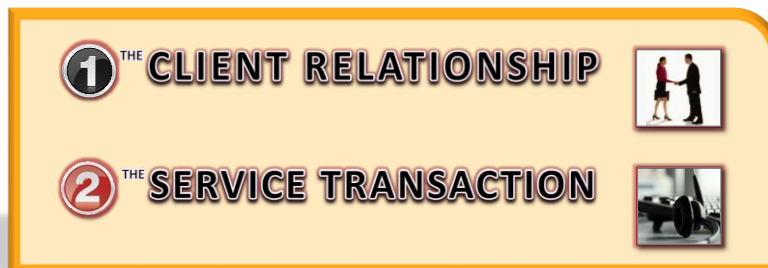
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Strategies to Deliver Exceptional Service

- To deliver outstanding service on each and every client interaction, you must manage ...



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Managing the Service Transaction

Seamless Service

- Seamless Service is the ability to manage service factors that are invisible to clients.



Seamless Service and ADP Workforce Now

- WFN clients expect one ADP service associate to assist them when they call ADP with multiple issues.

If ...	Then ...
A client's issue deals with an area/topic you are not responsible for supporting (for example, TLM, HR, or ADP 401k)	Warm transfer the call to the appropriate service partner and/or business unit or initiate a conference call.

- How you manage the client before these processes take place may determine if the client has a positive, seamless service experience.

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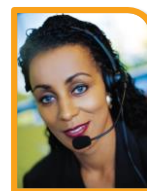


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Managing the Service Transaction *(Continued)*

Multi-Product Service Issues | Warm Transfer

- Contacting multiple service partners can become frustrating.
- Use the internal transfer extension for:
 - Warm transferring to another service partner
 - Initiating a conference call
- You should never give any internal transfer extensions to a client.
- You should never warm transfer any payroll related service calls.



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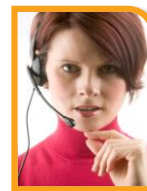


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Managing the Service

Proper Warm Transfer Procedure

- Before you warm transfer a call, it is crucial that you speak with the service partner's support associate.
- Once initiated – do **NOT** hang up on a transfer or conference call before the other associate answers.
- **NEVER** blind transfer a client to an internal transfer number.
- Coordinate your efforts with those of other associates, to create a seamless experience. The goal is to provide assistance – not deferment.



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Call Scenario

- You've assisted a client with their issue, but now he or she has an additional issue that requires you to transfer the client's call to another service partner for additional assistance.

What is your response to the client?

What are some responses you should avoid?



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Review | *Delivering Exceptional Service*



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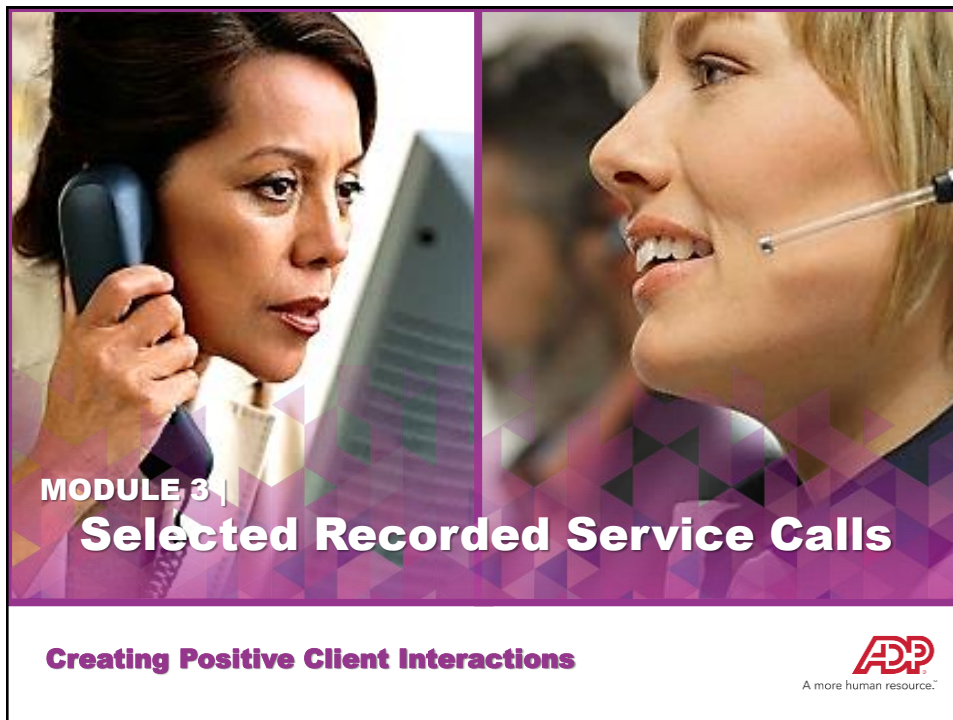


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Module 3 | *Selected Recorded Service Calls*



This module includes the following topics:

- Preview | Discussion Follow-Up Questions
- Service Associate Client Call
- Discussion Follow-Up Questions | What Do You Think?



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Preview | *Discussion Follow-Up Questions*

- 1** How did the associate take the initiative during this call?
- 2** How did the associate make the client feel special?
- 3** How did the associate manage the service transaction?
- 4** How did the associate manage the client relationship?
- 5** How did the associate demonstrate seamless service on this call?
- 6** What, if anything, would you have said or done differently during this call?
Were there any areas of opportunity?



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Service Associate Client Call

SAMPLE RECORDED CALL

KAREN UNDERWOOD




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Discussion Follow-Up Questions | *What Do You Think?*

1. How did the associate take the initiative during this call?
2. How did the associate make the client feel special?
3. How did the associate manage the service transaction?
4. How did the associate manage the client relationship?
5. How did the associate demonstrate seamless service on this call?
6. What, if anything, would you have said or done differently during this call? Are there any areas of opportunity?

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Review | *Selected Recorded Service Calls*

This module included the following topics:


- Preview | Discussion Follow-Up Questions
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- Discussion Follow-Up Questions | What Do You Think?



MODULE 4
Selected Recorded Service Calls
Creating Positive Client Interactions
ADP
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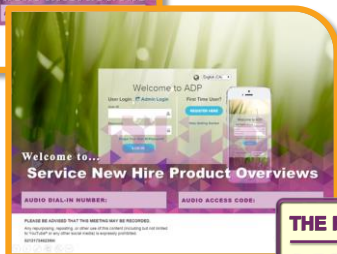
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Course Conclusion | *What We Covered + Where We're Going*



- ADP Service Process & Strategy
- Delivering Exceptional Service
- A Selected Recorded Service Call



- ADP Product Overviews
- Scenario-Based Role Plays

THE RESULT...

A POSITIVE CLIENT EXPERIENCE!

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ADPworks Resources



Additional Information for the following topics is available on ADPworks:

#	TOPIC	SEARCH PHRASE
1	ADP Service Process	Service Process
2	Service (OODA) Loop Basic Illustration	Service Loop Basic
3	Service (OODA) Loop Complex Illustration	Service Loop Complex
4	Contact and Available Service Options	Contact Options, or Service Options
5	Managing the Service Transaction	Service Transaction
6	Correct Language Response Examples	Correct Language
7	Recorded Service Calls	Recorded Calls

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Course Conclusion | *Thank You + Evaluation*



Training Evaluation

1. First Name:

2. Last Name:

3. Role:

4. Implementation or Service Center:

Next >>



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