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# An Examination of Communication Competencies for Telephone and Internet Customer Service Representatives

Julie M. Powers  
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The level of service that organizations are providing to their customers is critical to customer loyalty and customer retention. Providing quality customer service should be an organization's top priority. If organizations do not pay attention to the quality of service they are providing to their customers, they may run the risk of being put out of business. To provide quality customer service, an organization must consider the needs of its employees must be addressed internally in order to project a positive image externally. Addressing the needs internally shows that an organization cares about its employees and wants them to grow both personally and professionally. An organization also wants to show a customer that they care about them. This is projected to a customer in the manner in which an organization's customer service representative interacts with that customer. Customer service representatives communicate with customers via the telephone and the Internet. Telephone customer service encompasses any individual who communicates with a customer over the telephone. The discussion of telephone customer service is not limited to call centers but incorporates any type of communication that takes place via the telephone. Internet customer service refers to addressing customer queries, problems or concerns that are brought to an organization's attention via E-Mail or by Web site queries. The purpose of this study is to determine what competencies organizations consider most important for representatives providing customer service via the telephone and Internet. In addition, data were compared to determine if there is a difference in the competencies that are required for telephone customer service representatives and Internet customer service representatives.

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The level of service that organizations are providing to their customers is critical to customer loyalty and customer retention. Providing quality customer service should be an organization's top priority. If organizations do not pay attention to the quality of service they are providing to their customers, they may run the risk of being put out of business. To provide quality customer service, an organization must consider the needs of its employees must be addressed internally in order to project a positive image externally. Addressing the needs internally shows that an organization cares about its employees and wants them to grow both personally and professionally. An organization also wants to show a customer that they care about them. This is projected to a customer in the manner in which an organization's customer service representative interacts with that customer. Customer service representatives communicate with customers via the telephone and the Internet. Telephone customer service encompasses any individual who communicates with a customer over the telephone. The discussion of telephone customer service is not limited to call centers but incorporates any type of communication that takes place via the telephone. Internet customer service refers to addressing customer queries, problems or concerns that are brought to an organization's attention via E-Mail or by Web site queries. The purpose of this study is to determine what competencies organizations consider most important for representatives providing customer service via the telephone and Internet. In addition, data were compared to determine if there is a difference in the competencies that are required for telephone customer service representatives and Internet customer service representatives.

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**AN EXAMINATION OF  
COMMUNICATION COMPETENCIES FOR  
TELEPHONE AND INTERNET CUSTOMER  
SERVICE REPRESENTATIVES**

**A Paper in  
Human Resource Development**

**By**

**Julie M. Powers**

**©1999**

**Submitted in Partial Fulfillment  
of the Requirements  
for the Degree of**

**Master of Science**

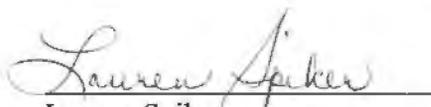
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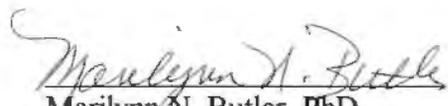
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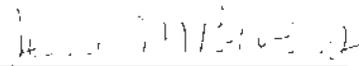
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Marilynn N. Butler, PhD  
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Julie M. Powers

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## Chapter I

### Introduction

This paper presents a research project that was conducted to identify the competencies considered most important by organizations for telephone and Internet customer service representatives. Chapter 1 introduces and outlines the background of the study. Chapter 2 provides an extensive review of the literature that supports the need to have highly skilled and qualified representatives that provide quality customer service. The methodology used to conduct the study is presented in Chapter 3. The results of the study are discussed in Chapter 4 and Chapter 5 draws conclusions and offers recommendations for future research.

The level of service that organizations are providing to their customers is critical to customer loyalty and customer retention. Providing quality customer service should be an organization's top priority. If organizations do not pay attention to the quality of service they are providing to their customers, they may run the risk of being put out of business.

To provide quality customer service, an organization must consider the needs of its employees and assess the needs and wants of the customers. The needs and wants of the employees must be addressed internally in order to project a positive image externally. Addressing the needs internally shows that an organization cares about its employees and wants them to grow both personally and professionally. An organization also wants to show a customer that they care about them. This is projected to a customer in the manner in which an

organization's customer service representative interacts with that customer.

Customers enter the store or transaction with certain expectations that are based on their previous experiences. If the level of service they receive does not meet these expectations, they will take their business elsewhere. It is imperative that an organization recognize the need to meet the customers expectations.

In order to meet these expectations, highly skilled customer service representatives must provide quality service. These representatives should be highly skilled in a variety of areas. With the rapid growth in information technology today, the representatives not only need to be able to communicate via telephone, they must also be proficient in basic computer skills. Use of the Internet is growing by leaps and bounds. Consequently, with this growth, there is a need for organizations to focus on customer service via the Internet.

Customer service representatives communicate with customers via the telephone and the Internet. Telephone customer service encompasses any individual who communicates with a customer over the telephone. The discussion of telephone customer service is not limited to call centers but incorporates any type of communication that takes place via the telephone. Internet customer service refers to addressing customer queries, problems or concerns that are brought to an organization's attention via E-Mail or by Web site queries.

In order to properly address these concerns, highly skilled and qualified representatives must deliver quality customer service. The purpose of this study is to determine what competencies organizations consider most important for

representatives providing customer service via the telephone and Internet. In addition, data were compared to determine if there is a difference in the competencies that are required for telephone customer service representatives and Internet customer service representatives. In the following chapter, a review of related literature provides insight into the scope of the study.

## Chapter II

### Review of the Literature

Customer service representatives must be well versed and highly qualified in a number of skills. Determining the specific competencies and its level of importance for telephone and Internet customer service representatives is the purpose of this study. Organizations must have qualified representatives delivering quality customer service.

In today's competitive market, quality customer service is essential if an organization wants to retain its customers. Keeping customers happy and having new business referred is important and impacts the profitability of the business. According to a recent study reported in The Customer Service Advantage, 45% of customers who leave a service provider leave because of poor customer service ("Top Service News," 1998). This finding implies that organizations should pay close attention to the relationship they have with their customers and the level and quality of service they are providing to their customers.

An organization must evaluate and assess what type of experience they are creating for their customers and what the customers expectations are of the organization (Wilhem & Rosello, 1997; Zemke, 1997). If a customer has a positive experience in dealing with an organization, typically that customer will continue to do business with an organization. This positive experience also helps to secure customer retention. If a customer has a negative experience in dealing with an organization and the level of service does not meet expectations, that

customer normally will not chose to do business with that organization again.

When dealing with customers, an organization must strive to create value in the transaction for both the service provider and the customer. Part of creating value within the organization is continually improving the internal processes, the employee and the quality of the services offered. It is hoped that a positive experience that meets the customer's expectation will maximize customer retention. Customer satisfaction and retention is a primary goal of total quality management (Mears & Voele, 1994).

In order to be successful in the implementation of total quality management, continuously communicating to all key players is essential. Effective communication is a skill and must be reassessed and refined over time. Analyzing the communication process allows the communicator to assess how he or she is interacting with customers (Conrad, 1990). Customer service representatives work with the company's customers every day. The telephone and the Internet are two primary means in which customers communicate with organizations. The type of experience the customer has with the representative is critical to whether or not the customer will return. Highly skilled customer service representatives must be providing high quality customer service.

This literature review offers a six part discussion which brings the issue of customer service communication competencies into focus. First, the value of the customer is discussed. Second, the concept of total quality management is explained. Third, a communication process model is presented. General Systems

Theory, the fourth component and theoretical framework supporting the study, is analyzed. The fifth and sixth components, telephone customer service and Internet customer service are examined. A combination of all of these components creates highly effective communication between the customer, the organization and keeps the customer coming back.

### Value of the Customer

Who is the customer? According to Drucker (1974) the customer is “. . . the ultimate user of a product or a service . . .” (p. 94). Every organization needs to define who its customers are and do whatever it takes to satisfy their wants and needs both internally and externally. The customers need to be served with top notch service in order to keep the customer coming back. The customer is one of the key players that allows the organization to stay competitive in business and industry. Zemke (1997) notes:

According to the Strategic Planning Institute of Cambridge, Mass., organizations that focus on the quality of customer care keep customers up to 50 percent longer, have 20 percent to 40 percent lower marketing costs and experience 7 percent to 17 percent better net returns. (p. 12)

With these proven statistics every organization’s primary focus should be on the quality of customer care it is providing. To uncover what forms of customer care philosophies exist, Coopers and Lybrand surveyed over 60 companies in a variety of industries. They found that some companies “. . . still regard service to customers as little more than an obligation . . . [and] . . . others are coming to see

customer care as a real business opportunity” (Wilhem & Rosello, 1997, p. 20). Customer care is seen as a powerful tool and it works to the organization’s advantage. It creates new opportunities to promote products and services, establishes customer loyalty, builds relationships and creates feedback mechanisms (Wilhem & Rosello, 1997). Paying close attention to each of these opportunities brings meaning to the true value of the customer and demonstrates that the organization is devoted to serving its customers.

Struebing (1996) notes that “Today’s customers have a lot of choices; they expect to be satisfied and companies must continually find ways to give them something extra to win their loyalty and keep them as lifetime customers” (p. 30). With the level of competition that exists in today’s market, customers base their opinions on expectations, experiences and value. The customers enter a transaction with high expectations and “. . . have high standards for routine transactions” (Struebing, 1996, p. 25). In other words, with every transaction, the customer strives to have a positive experience communicating and interacting with the service provider. When a positive experience is accomplished, the value of the product and the entire way in which the customer views the organization increases immensely. By placing an emphasis on value “. . . organizations gain strategic advantage by focusing on customer retention and creating value” (Zemke, 1993, p. 46). It is through this creation of value that an organization achieves customer loyalty. The concept of value must be incorporated into the organizations mission statement and strategic plan in order to gain an edge over the competitors.

According to Zemke (1993), there are three value strategies that organizations can implement to achieve customer loyalty: (1) operational excellence, (2) customer intimacy and (3) product leadership. Operational excellence means having a quality product available and deliverable at a competitive price. Customer intimacy is having the right kind of products available for the targeted population. Finally, product leadership is offering state of the art products and excellent customer service to outshine competitors. Not all of these strategies need to be implemented simultaneously but in order to influence the customer, some form of each strategy should be implemented. The end result of utilizing a combination of all three strategies is a customer who values the quality of the product and the level of the service provided. This creates customer loyalty and customer retention. The principles of Total Quality Management capitalize on creating value for the customer.

#### Total Quality Management

Quality is an important component that helps organizations retain customer's satisfaction. "Quality is judged by the customer; [therefore] firms should consider current and future, potential and lost customers" (Neves & Makhai, 1993, p. 125). To achieve higher customer satisfaction and retention levels, organizations have embarked on a mission of total quality. The concept of Total Quality Management (TQM) was originally introduced to managers in Japan by W. Edwards Deming and was then brought to the United States in the late 1970's, became popular in the 1980's and today still plays an integral role in

corporate America. “TQM is a management philosophy that institutionalizes continuous improvement of all processes in the sociotechnical systems of organizations” (Swanson, 1992, p. 113). Today, the concept is fully realized in the Continuous Quality Management (CQM) movement. CQM is a long term philosophy by which all members of an organization work together to improve the quality of goods and services offered. CQM strives for “. . . ‘continuous improvement in satisfying customers . . . and . . . reducing variation in the products for services produced’” ( Mears & Voele, 1994, p. 19). Customer satisfaction is the key to customer retention and must be addressed by organizations in the customer service industry. Covey (1990) asserts that “people who don’t make quality their number one priority won’t make it through the United State’s tough economic times . . . ” (p. 253). In order to survive, organizations must commit and focus on identifying areas that need to be continuously improved.

#### Four Areas of Total Quality

According to Covey (1990) “Total quality is an expression of the need for continuous improvement in four areas: 1) personal and professional development 2) interpersonal relations 3) managerial effectiveness and 4) organizational productivity” (p. 250). A closer examination of these four areas provides some definition that will anchor the rest of this discussion.

Personal and professional development. Personal and professional development focuses on empowering the employees to continually develop and strengthen their skills. Focusing on the employees and showing them that the

organization cares should be a priority in order to project a positive image to the customer. This can be done internally by concentrating on developing employees' skills and creating a career development path. The beginning of this path starts with career motivation. "Career motivation includes being resilient in the face of change, having insight into one's self and the environment, and identifying with one's job, organization, and/or professions as career goals" (Hall, 1986, p. 25). The three elements of career motivation are career resilience, career insight and career identity (Hall, 1986). Career resilience focuses on how morale and attitude hold up when something does not go as well as anticipated. The individual is able to react in high stress situations, resolve problems and move on.

Career insight, the second element, refers to how objective the individual is about set career goals and how the two are perceived by the individual. Constructive feedback is essential for this component of career motivation and to individual career development. Feedback mechanisms allow an individual to see how they are viewed by others and shows a desired behavior that is preferred (Wimer & Nowak, 1998).

The third component is career identity. This component is the means by which an individual describes themselves by his or her work. Rewards and opportunities guide the direction of career goals and advancement (Hall, 1986). Organizations need to pay close attention to the individual needs of their employees. They must be empowered and a career development path must be planned. In order to project a positive image externally, there must be internal

mechanisms established to keep the individual growing both personally and professionally. “Employee attitudes are related to customer satisfaction. If employees are not happy, this will be reflected to the customers” (Struebing, 1996, p. 29). It will also impact a customer’s overall expectation and experience in dealing with the organization and determine whether or not that customer will return.

Interpersonal relations. The second area of total quality is interpersonal relations. This area focuses on praising and encouraging an employee. The interpersonal aspect also establishes a level of trust between the individual and the organization.

Managerial effectiveness. Managerial effectiveness is the third component of total quality. This component focuses on building a winning relationship with employees. Building winning relationships ensures that individual objectives are aligned with management objectives and also empowers the individual. The people are the key to the organization’s success and the contributions the individual makes to the organization must be recognized by management. Each employee must be recognized as an asset to the organization. Encouragement to take on additional responsibility should be promoted along with satisfying the customers wants and needs (Cocheu, 1992).

Organizational productivity. The fourth component is organizational productivity. Organizations must listen to their stakeholders, solve problems and work toward continuously improving the quality of the organization. It can not be

a one time or crisis effort. It must be done continuously in order to ensure all parties involved are satisfied. A synergistic approach to improving the organization is a critical component to continuous quality improvement.

All four areas of total quality must be instituted on a personal and professional level. If total quality is not addressed it can impact the long term profitability of the organization. "Quality will give an individual or organization a long-term competitive advantage" (Covey, 1990, p. 260). The principles of total quality are devised and developed around the people in the organization and the customers. "Deming defines quality as meeting the customer's needs. He argues that the way to do this is to improve continuously the processes that produce the products and services" (Brinkerhoff & Gill, 1992, p. 122). Deming's fourteen points serve as a means to improve these processes and change the organization (Chizmar, 1994). The fourteen points are as follows:

1. create constancy of purpose for the improvement of product and service
2. adopt a new philosophy
3. cease dependence on inspection
4. end the practice of awarding business on price tag alone
5. improve constantly and forever the system of production and service
6. institute training and retraining
7. institute leadership
8. drive out fear

9. break down barriers between staff areas
10. eliminate slogans, exhortations and targets for the workforce
11. eliminate numerical quotas
12. remove barriers to pride in workmanship
13. institute a vigorous program of education and retraining
14. take action to accomplish the transformation.

(Presutti, Buzzi & Heckman, 1995, p. 136)

These fourteen points strive to change the process. However, the individual is also a critical component of the process that must be considered.

Covey's seven habits of highly effective people focuses on empowering the individual "... to work more effectively together in a state of interdependence - the condition required for maximum communication, cooperation, synergy, creativity, process improvement, innovation and Total Quality" (Covey, 1990, p. 267). The following list states Covey's seven habits of highly effective people (Covey, 1989):

Habit 1 - Be proactive - the Principle of Self Awareness, Personal Vision and Responsibility:

- The individual must take the initiative to move forward both personally and professionally.

Habit 2 - Begin with the End in Mind - the Principle of Leadership and Mission:

- Establish and work toward long term goals and objectives.

Habit 3 - Put First Things First - the Principle of Managing Time and Priorities Around Roles and Goals:

- Once Habits 1 and 2 have been established Habit 3 is implementation of the goals.

Habit 4 - Think Win Win - the Principle of Seeking Mutual Benefit:

- All key stakeholders are in it to win.

Habit 5 - Seek First to Understand Before Being Understood - the Principles of Empathic Communication:

- One must understand one another before being understood in return.

Habit 6 - Synergize - the Principle of Creative Cooperation:

- A healthy environment entails trust and communication and each individual is encouraged to work independently and contribute to the group in their own individual way.

Habit 7 - Sharpen the Saw - the Principle of Continuous Improvement:

- This habit defines the four needs or characteristics of people and the organization. They are physical and economic, intellectual or psychological, social or emotional and spiritual or holistic. Further developing all of these needs or characteristics helps both the individual and the organization grow personally, professionally and impact's the organization's bottom line.

It is through a combination of Deming's fourteen points and Covey's seven habits of highly effective people that objectives and strategic plans are devised and developed to help the individual, the organization and the customer. The key element to the individual, the organization and the customer relationship is effective communication. A dissection of the communication process offers further insight on how to successfully communicate with customers.

#### Communication Processes

Communication is the process by which information is exchanged. Janosik & Davies (1986) refer to D.K. Berlo's model of communication. This model simplifies the basic complexity of how human beings communicate and exchange information. Specifically, it offers an understanding of the process of communicating with customers. A basic awareness of this process assists in further developing the skills of the customer service representative. This model consists of five components: (1) the need to communicate or the referent, (2) the sender, (3) the message, (4) the medium in which the message is sent, and (5) the receiver. A brief discussion about the way the model works through these 5 components provides an understanding of this process.

First there is the need to communicate or the referent, which originates the communication process. The sender transmits the information in the form of a message. This message is sent through an appropriate channel or medium. The message is then received by the receiver who decodes and interprets the meaning of the message.

This model simplifies the basics of the communication process. As communicators, we utilize this model continually on a day to day basis without really thinking about it. How messages are sent and interpreted is an important process to any working relationship. Because communication is such an integral part of our daily life both personally and professionally, this process is critical to the success of the individual and the organization. An examination of interpersonal communication further breaks down the communication process.

#### Interpersonal Communication

According to Ralph (1998) interpersonal communication involves the exchange of two types of messages: content and relational. Content focuses on a subject, goal or topic while the relational refers to the emotional element that is based on feelings, values and beliefs. When sending a message it is important to take these factors into consideration. “In the communication act human feelings are as important as the intellectual processes involved; that individual’s responses in interactions are determined not only by what is communicated, but how it is interpreted by the receiver . . .” (Ralph, 1998, p. 20).

It is important to understand the basics of the communication process and interpersonal communication. Both components are a critical part of communicating with customers. If the customer service representative is not sending a clear message to the customer, the customer will be unable to decode the message and interpret its meaning. The interpersonal aspect of the message is also another critical element of the process. When sending a message, it is important

to take into consideration the feelings of the person receiving the message. An analysis of the communication process assists in refining the basic communication skills that would be required for a customer service representative. The development of communication skills is an art. It is something that must be worked on daily and may take an entire lifetime to develop and to refine. Kaye (1998) offers several easy and proven techniques that can be used to further develop the communication skills. Suggestions include: listen to understand, assist the sender and adjust your focus.

#### Listen to Understand

When one listens to understand, the individual must decide to listen to what the sender has to say. Data is collected and must be continuously assessed. Messages can be sent in a variety of forms. An astute communicator takes all factors into consideration before making a sound decision. To completely concentrate on what the sender is saying, everything else must be put aside and ignored. When listening to someone speak Kaye (1998) offers the following suggestions: 1) keep an open mind, 2) all personal biases must be put aside so that a new objective opinion can be established, 3) process the information as it is heard and 4) make comparisons and check for consistencies in the information being conveyed.

#### Assist the Sender

In the second category, assist the sender, listening can be made easier by taking part in the conversation. It can be done by being and acting pleasant,

participating and asking questions, and treating others with respect. When working with a customer it is important to utilize all of these suggestions because it lets the customer know that you are listening to his or her questions or concerns.

### Adjust the Focus

Adjust the focus is when changes are made in communication style to enhance overall effectiveness as a communicator. This is done through analyzing how one is communicating and then trying to formulate responses that can be understood. Mirroring the other person's behavior helps establish a level of trust and increases rapport.

All the components addressed by Kaye (1998) assist in improving communication abilities. These suggestions also help to achieve open lines of communication within the organization. Regardless of what type of industry one works in, all the suggestions listed above can enhance the communication process of the individual both personally and professionally. To further analyze the communication process, a discussion of General Systems Theory will be presented.

### General Systems Theory

“Communication is the process by which we develop and share meaning” (Bradley, 1984, p. 6). General systems theory provides a theoretical framework in which to analyze and study the communication process. Ludwig von Bertalanffy, a biologist and philosopher, established the principles of General Systems Theory in 1968. This theory provides a framework for dissecting and understanding why and how communication processes function. The presumption is that “. . . systems

consist of many interacting subsystems, which are distinguished by boundaries that, in turn, monitor and control the rate and flow of inputs from the environment to the system and the outputs from the system to the environment” (Gradous, 1989, p. 30). According to Conrad (1990) there are three components of the theory: system wholeness, system boundaries and system process. The following discussion provides a closer examination of these components.

### System Wholeness

System wholeness outlines that every system, regardless of size, is made up of larger suprasystems and subsystems. The subsystems are part of smaller interdependent systems. For example, the customer service department of an organization is a system that is made up of subsystems, the customer service representatives and their interactions with the customers. The smaller interdependent system is comprised of the daily tasks of the representative both on and off the job. But when viewing the organizational chart, they are only one small part of the suprasystem that exists within the organization.

### System Boundaries

The second component is the boundaries which establishes the parameters of the system (Conrad, 1990). Within the boundary lines of the organization, information is exchanged among the various subsystems that exist. The boundary lines that exist are different for each organization. They are established for the flow of information between the subsystems both internally and externally. Some organizations have established boundary role elements, who monitor the exchange

of information with people outside the established boundary lines. These people, called boundary spanners, perform four critical roles for their organization: environmental scanning, information gathering, protecting people inside the organization and serving as a representative of the organization to the public (Conrad, 1990).

Environmental scanning. Boundary spanners scan the environment and report valuable information about the environment back to the organization. They obtain information regarding the organization's inputs (raw materials, personnel) and outputs (changes in consumer wants and needs) that can impact the strategic plan of the organization.

Information gatherers. Boundary spanners serve as information gatherers who obtain critical information on the daily functions of the organization as well as new product development and technological advances. The information gatherers obtain confidential information pertaining to the overall progress and status of the organization. Moreover, they must use their discretion as to when and where this information will be shared with others in the organization. In other words, they act as information control agents.

Protecting people inside the organization. Protecting people inside the organization from others who would like to influence their behavior is the third role of the boundary spanners. For example, customer service representatives are boundary spanners for the organization in which they are employed. They act as the barrier between the customer, management and act in the capacity of a problem

solver. They work directly with the customer while the management staff is able to further enhance other existing subsystems and develop new subsystems.

Representative of organization to public. The fourth function of the boundary spanners is representing the organization to the public. They serve as a liaison between the public and the organization. Their primary function is to project a positive image of their organization to the public and influence the attitudes and behaviors through effective communication. All four components of the boundary spanners are inter-related and affect the organization as a whole.

#### System Process

The final component of systems theory is the process. The process is the system in which the employees adapt and problem solve the situation at hand -- an information exchange. Systems theory is based on the principle of equifinality. Equifinality is the process by which situations can be solved by looking at a variety of options (Conrad, 1990). Customer service representatives continually problem solve issues that are brought to their attention by customers. An acceptable solution must be proposed in a timely fashion. This concept assumes that employees can adapt to the rapidly changing environment and meet the customer's and the organization's needs. In today's business environment, systems are constantly changing; however, over time they run the same course and the same patterns emerge. By continuously analyzing the organization's communication processes, a greater understanding of what areas need further development

emerges. This analysis also reveals the organization's culture and the significance of effective communication.

General Systems Theory provides a framework for understanding the importance of organizational communication and its effect on the customer. Implementing quality customer service via the telephone and the Internet is a communication process that takes place on a daily basis between the systems and the subsystems. Determining an organization's internal and external boundary lines assist in delivering quality customer service. The customer service representatives are the organization's internal boundary line and deal with the customers who are the external boundary line. Customer service representatives also serve as boundary spanners who disseminate information across the boundary lines and are key contributors to the entire communication process. The telephone and Internet are two mediums in which organizations communicate to their customers that are located within the system.

#### Telephone Customer Service

Organizations communicate with their customers via telephone. According to Young (1997) "Even though technology functions as a tool to improve customer satisfaction, unless you first enhance the skills of the people who are providing the service, your company will be at a great disadvantage" (p.90). Abrams (1998) notes, "The telephone is your single most important means of business communication. Used correctly, it is a powerful tool. Used carelessly, it can turn on you" (p. 3F). In most cases, the only interaction a customer has with

the service provider is over the phone. The manner in which the customer is greeted when the customer initially calls an organization and the timeliness in which the customer's situation is solved, leaves a lasting impression. Jarvis (1994) quotes Nancy Friedman, founder of the Telephone Doctor, who states:

Hundreds of millions of dollars are leaking through phone wires because of the way people are treated . . . . Studies reveal that callers form lasting opinions of a company within the first six seconds of a telephone conversation or voice-mail encounter. Whoever answers the phone is the company. (p. 18)

Every effort must be made to ensure that the first impression is a good impression. When a customer calls an organization the customer likes to deal with a professional, knowledgeable, confident and friendly person who can solve the customer's problems quickly and conveniently (Gottheimer, 1993; Mills & Morris, 1997). Therefore, the type of experience the customer has can determine whether or not that customer will do business with the organization in the future.

Customer service representatives who communicate via the telephone should have basic telephone skills that include proper articulation and manners. When communicating over the telephone the representatives must be able to maintain a balance of energy, pace, flow, tone and clarity ("Selling Yourself," 1996 ). Here, energy means speaking so that others can hear you. Pace is the rate in which the words are spoken. Representatives do not want to talk too fast or too slow. They must speak at an even rate so they can be clearly understood. Flow

involves speaking without any interruptions and sounding natural. Vocalized pauses should be avoided. Tone involves changing the rate, volume and pitch in which the representative speaks to avoid monotony. Clarity means being clear enough so that the listener can understand. Basic phone skills are a necessary component of effective communication and every telephone customer service representative must have them.

It is imperative that customer service representatives act professionally and maintain a positive attitude while interacting with the organization's customers. Doyle & Carolan (1998) report that "Reps must enjoy answering telephone calls over extended periods. They also have to like dealing with different callers and kinds of calls" (p. 61). Young (1997) asserts that there are three main behaviors that make customers feel they are receiving better service from an organization: helpfulness, friendliness and courtesy. The individual on the other end of the phone is responsible for ensuring that the customer is treated with the utmost care and that the problem is resolved in a timely fashion. Recently, Technical Assistance Research Programs surveyed over three hundred companies across numerous industries and found that businesses lose 20% of a customer's loyalty if the customer's issue is not resolved in a timely fashion (Doyle & Carolan, 1998). If organizations want to keep their customers, they must ensure that they are providing their customers with quality service. This effort involves making sure all representatives interacting with the customers are highly qualified and use appropriate skills.

Research suggests that there are several skills in which customer service representatives should have demonstrated competencies (Ambrose, 1996; Desatnick, 1987; Fishman, 1997; Kislik, 1998; "Let Customer Needs," 1998; Wasserman, 1997). These skills include: probing, oral communication skills, relationship building, knowledge of the product, learning, assessment and refinement skills, time management skills, interpersonal skills, teamwork, decision making, problem solving, concern for others, negotiation skills, dependability, judgment, enthusiasm, high energy level, flexibility and adaptability. Doyle & Carolan (1998) assert that of these skills, the four most important are: (1) knowledge of the business product; (2) strong interpersonal skills (especially listening skills and flexibility); (3) problem solving skills; and (4) negotiation skills. "To enable top performance, skills need to be worked on regularly. It's important that skill development is viewed as a process, not as an event" (Geery & Price, 1996, p. 103). The results of ongoing skill development enhance the representative's job performance and shows the individual that the company is interested in promoting personal and professional growth (Geery & Price, 1996). Over time skills must be refined and updated to meet the rapidly changing needs of the customer and to ensure customer retention. Part of the changing needs include the medium used to provide customer service. While communication skills are essential for all customer service representatives, the form of these skills may vary when the delivery of the system is over the Internet. An examination of

customer service delivered on the Internet provides insight into this customer service delivery system.

### Internet Customer Service

Telephone skills have always been important but now with the introduction of the Internet, customer service skills via the Internet are equally important. Forrester Research surveyed leading customer service companies and Fortune 1000 companies and reported that “. . . 85% of the firms surveyed said they were on the Web because of customer demand” (It’s a Web Invasion,” 1998, p. 7). Furthermore, this study indicated that because of customer demand, it is expected that the use of the web for customer service will double in the next two years. Customers like the convenience of communicating with an organization over the Internet rather than having to make a phone call or go into the organization to straighten out a problem.

According to Zemke (1997), in 1996, USA Today reported that shoppers prefer catalogue and telephone shopping to mall and store shopping. Bilvosky (1998) asserts that “Poor customer service - combined with the time constraints of today’s shoppers - may be the main factors pushing consumers into buying via catalogues and especially the Internet, the fastest growing segment of retail” (p. 1E).

“The creators of the Internet wanted to develop a way to gather, disseminate and exchange information quickly” (Kirshenber, 1998, p. 83). Since its creation, the Internet has grown by leaps and bounds and is still growing. All

areas of business are being affected by this rapid technological advancement, including the customer service area. "Electronic mail is a rapidly growing medium of customer service" (Houser, 1997, p. 25). Abernathy (1999) asserts that "It's the number 1 Internet tool" (p. 18). "An Ernst & Young poll reveals that 36 percent of respondents use email more frequently than any other communication tool, including the telephone" (Abernathy, 1999, p. 18). Current research by Gartner Group Inc. "... predicts that by 2001, 25 percent of all customer contacts and inquiries will be conducted via the Internet" (McCright, 1999, p. 57). With statistics like, these organizations recognize the need to utilize the Internet for customer service. Long term implications of customer service via the Internet suggests lower customer service costs and higher customer satisfaction. In order to achieve this positive outcome, the experience customers have communicating with the organization via the Internet must be comparable to the type of experience the customer would have if the customer was physically in the store (Quick, 1998).

The Internet is viewed as a means of communication in which correspondence is done primarily through written communication. When responding to the customer via E-mail it is very important to make sure that the response is written clearly and concisely. Bischoff (1997) states that when communicating via E-Mail the composer must "... pay careful attention to grammar, mechanics, and presentation of the message. It must be written with care and attention to professionalism" (p. 57). The words must be carefully chosen and typed correctly. When communicating via telephone, the words

chosen, the manner and the attitude in which they are conveyed are critical to the level of customer satisfaction. The same holds true for the words and mannerisms that are chosen when communicating via the Internet. The written communication must be presented formally and professionally. The wrong choice of words may end up hurting the customer service representative and the organization. With the expected growth in this area, it is critical that the representatives are trained and have the essential skills to keep the customer happy. According to Cole-Gomolski (1998) & Sterne (1996), representatives implementing customer service via the Internet must have excellent written skills, organizational skills and typing skills. Along with outstanding skills, the representative must also be able to incorporate value into the transaction.

With the rapid expansion in the use of the Internet for customer service, many companies are not "... 'paying attention to how they're going to build a customer experience that provides unique value'" (Grant, 1999, p. 1F). When a customer receives poor customer service they often get upset (Kornblum, 1999). Depending on the nature of the problem and if the problem is not solved in a timely fashion, the level of frustration the customer experiences builds. It can build to the point that the customer no longer wants to do business with the organization and publicizes his or her negative experience to friends, family and other business associates. Thus a negative reputation about the organization is created. It is critical that organizations recognize that they have highly skilled representatives delivering quality customer service via the Internet. The customer's experience

must be positive and exceed the customer's expectations. The end result is customer loyalty and customer retention.

Target Marketing of Santa Barbara (1998) suggests eight ways to achieve excellent customer service on the Internet. These suggestions incorporate responding to E-Mail's and Web site queries:

- 1) Recognize that the world has changed. Management must support the organization moving forward technologically and address the fact that the Internet is a means of acquiring new customers and retaining the old.
- 2) Post a frequently asked questions document. A list should be developed and posted on the Internet containing the answers to questions that the telephone customer service representatives are frequently asked.
- 3) Respond to E-Mail. All inquiries and questions asked over the Internet must be responded to in a timely manner. Internal job aids can assist with answering the questions.
- 4) Create a place for discussion. Include an on-line discussion feature to allow customers to exchange information and obtain feedback on the organization and its services.
- 5) Track customer's visits. Keep reports on how the customer is using the Internet.
- 6) Provide access to as much information as possible. Let customers know what is going on and provide as much detail and information that is feasible.

7) Give the customer access to live information. Give the customer specific details such as when a product will be delivered or when the problem will be solved.

8) Treat customers like individuals. Add a personable touch when communicating to customers. It keeps them coming back.

Utilizing these suggestions enhances the communication process and delivery system when assisting an organization's customers via the Internet. Highly skilled customer service representatives are a key ingredient and makes the entire process shine.

“Customer service today means fielding phone calls, E-mail and Web site queries” (Cole-Gomolski & Fusaroand, 1998, p. 20). Assessment of the communication processes and the skills of the representatives providing the customer service is critical to the success of the organization. Ganzel (1998) notes that ““The reason so much customer service is bad is that the systems around the service are bad”” (p. 29). Research suggests skilled customer service representatives are important to successful business practices. Developing and refining the right skills for the job is essential. Because communication with customers takes place through a multiple number of channels, knowledge of what skills are most important for telephone and Internet customer service representatives is vital to an organization's success. The review of related literature provides the framework and rationale for the conduct of this study. This

information is a critical component in the development of research design. Chapter three describes the methodology followed.

## Chapter III

### Methodology

This study seeks to identify the core competencies considered most important by organizations for customer service representatives in two categories: 1) telephone representatives; and 2) Internet representatives. Data were analyzed to determine if there is a difference between the core competencies required for telephone customer service representatives and Internet customer service representatives. This chapter describes the research methods applied in this investigation. First, the preparation of the survey used in the study is discussed. Second, the surveyed sample is described. Third, the data collection method is provided. Finally, data analysis applications used are presented.

#### Preparation of the Survey

In order to assess what competencies organizations consider most important for telephone and Internet customer service representatives, a list of competencies was developed. This development process included an exhaustive review of relevant literature and a pilot study. The context of literature discussing the delivery of quality customer service and the skills necessary for telephone and Internet customer service representatives was examined and analyzed. From these examinations, a list of 18 competencies was created:

- oral communication skills
- problem solving
- decision making
- judgement
- sensitivity and concern for others
- dependability
- adaptability
- enthusiasm/high energy level
- organization skills
- written communication skills
- technical skills and competence
- interpersonal skills (flexibility and listening)
- time management skills
- teamwork/cooperation
- responsiveness
- negotiation skills
- proper grammar
- typing skills
- other

Sources: Bischoff, 1997; Desatnick, 1987; Doyle & Carolan, 1998; “Let Customer Needs”, 1998; Sterne, 1996.

This list was formatted into a preliminary survey. Participants were asked to rank the list of competencies for both telephone customer service representatives and Internet customer service representatives using a 1 - 5 scale, where “1” equals the lowest and “5” equals the highest. The survey also asked the participants to choose from the list of competencies, the first, second and third most important competency required for a representative providing customer service via the telephone and Internet. This survey was piloted by four Human Resource Professionals. (Appendix A). Pilot participants were asked to make improvements and changes to Version 1 of the survey. (Appendix B). Four changes were made and Version 2 was created. These changes are noted in Table 1. Appendix C displays the final version of the survey.

*Table 1. Version 1 and Version 2: Improvements and Changes to Customer Service Competency Survey*

<u>VERSION 1</u>	<u>VERSION 2</u>
Rate the competencies listed below with 5 being the highest and 1 the lowest.	Use the following scale when considering the competencies degree of importance:  5 = Very Important 4 = Important 3 = Somewhat Important 2 = Of Little Importance 1 = Not Important
What competency do you evaluate when completing a performance assessment for a representative implementing high quality customer service via the telephone/Internet?	Of the following competencies, which do you consider important and evaluate when completing a performance assessment for a representative providing high quality customer service via the telephone/Internet?
<p>Changes to Competency List:</p> <ul style="list-style-type: none"> <li>• Interpersonal skills (flexibility and listening)</li> <li>• Responsiveness</li> </ul>	<ul style="list-style-type: none"> <li>• Interpersonal skills (listening)</li> <li>• Responsive to Customer needs/questions</li> </ul>
Optional Background Information Section that asked for gender, race and number of years worked in the customer service area.	Optional Background Information Section that asked for number of years worked in the customer service area.

### Description of Sample and Data Collection

E-mail invitations to participate in the study were sent to six organizations/associations and list serv memberships. These organizations/associations and list serv memberships were chosen because they include individuals who work in various customer service arenas. The number of members for each list serv ranged from 200 to 1200. Table 2 presents a list of the groups invited to participate.

***Table 2. Invited Study Participants: Organizations/Associations/and List Serv Memberships***

- International Customer Service Association Chapter Presidents
  
- Companies Listed in the Training Section of the Rochester Business Journal/Internet Resource Directory
  
- Training and Development List Serv affiliated with Penn State University
  
- HR Net List Serv affiliated with Cornell University
  
- HRD-L List Serv hosted by@trends.ca
  
- The Call Center Forum, a list serv maintained by Human Resource Group of Bloomington, IL.

Nonprobability convenience sampling was used. Nonprobability samples do not assure that all units have the same chance of being included in the sample (Fink, 1995). “A convenience sample consists of a group of individuals that is ready and available” (Fink, 1995, p. 34). This fits the description of the participants in this study because the participants were ready, willing and able to participate in this study.

Appendix D displays the E-mail invitation. Each respondent to the invitation received a copy of the survey through a return E-mail message. A follow up E-mail was sent to people who had not returned the completed survey. (Appendix E). No further action was taken if the respondent did not respond by the deadline. Data were collected for one month.

#### Data Analysis

The data were evaluated as group data and analyzed through quantitative methods using Microsoft Excel 1998. Frequencies and percentages were calculated. Data were compared to determine where differences may exist.

## Chapter IV

### Findings

The purpose of this study was to identify the core competencies considered most important by organizations for customer service representatives when using the telephone and Internet. In this study, participants were asked to rate the importance of 18 competencies in a list provided for telephone and Internet customer service representatives. They were also asked to choose the first, second and third most important competency required for a representative implementing customer service via the telephone and Internet. This chapter focuses on reporting the degree of importance for each competency along with presenting the top three competencies for telephone and Internet customer service representatives.

The invitation generated 110 responses requesting to participate in the study. 70 surveys were returned representing a 64% response rate. All 70 surveys were useable for Section 1 - the telephone section and 67 were useable for Section 2 - the Internet section. Three participants did not complete Section 2 - the Internet section - because the Internet is not utilized for customer service at their organization. A tally of the number of years the participants worked in the customer service area revealed that the participants had a total of 903 years of experience in the customer service industry.

Overall, the competency that was considered “very important” for telephone customer service representatives was oral communication skills. The top ranked competency for the “important” category was enthusiasm/high energy level. Typing skills were the top ranked competency for the “somewhat important” category. Written communication skills ranked top of the “of little importance category” and typing skills were ranked highest in the “not important category.” Table 3 shows the competencies that were ranked, the frequency of importance and the percentage for telephone customer service representatives.

**Table 3. Frequencies and Percentages of Competency Rankings for Telephone Customer Service Representatives**

Competencies	Response Frequency					Response Percentage %				
	1	2	3	4	5	1	2	3	4	5
Oral Communication Skills	1	0	0	8	61	1	0	0	11	87
Problem Solving	1	1	5	28	35	1	1	7	40	50
Decision Making	0	3	18	32	17	0	4	26	46	24
Sensitivity and Concern for Dependability	0	1	8	26	35	0	1	11	37	50
Judgment	0	2	10	27	30	0	3	14	39	43
Enthusiasm/High Energy Level	0	0	10	31	29	0	0	14	44	41
Adaptability	1	1	15	33	20	1	1	21	47	29
Organization Skills	1	2	23	32	12	1	3	33	46	17
Written Communication Skills	0	9	29	28	4	0	13	41	40	6
Technical Skills and Competence	3	19	33	12	3	4	27	47	17	4
Interpersonal Skills	1	5	23	27	13	1	7	33	39	19
Time Management	1	0	0	9	60	1	0	0	13	86
Team Work - Cooperation	1	9	31	23	6	1	13	44	33	9
Responsive to Customer Needs	2	5	23	29	11	3	7	33	41	16
Negotiation Skills	0	0	1	12	57	0	0	1	17	81
Proper Grammar	2	8	23	30	7	3	11	33	43	10
Typing Skills	2	3	10	28	27	3	4	14	40	39
Other - (55% responded 0)	9	6	37	10	7	13	9	53	14	10
	2	1	3	3	6	3	1	4	4	9

For Internet customer service representatives, the competency that was rated “very important” was written communication skills. Judgment was the highest ranked competency in the “important” category. In the “somewhat important” grouping, negotiation skills ranked the highest. The skill that rated highest for the “of little importance” and “not important category” was oral communication skills. Table 4 lists the competencies that were ranked, the frequency of importance and the percentage.

**Table 4. Frequencies and Percentages of Competency Rankings for Internet Customer Service Representatives**

Competencies	Response Frequency					Response Percentage %				
	1	2	3	4	5	1	2	3	4	5
Oral Communication Skills	13	16	27	5	5	19	23	39	7	7
Problem Solving	1	0	6	20	40	1	0	9	29	57
Decision Making	0	1	14	34	18	0	1	20	49	26
Sensitivity and Concern for Others	0	3	14	32	18	0	4	20	46	26
Dependability	1	3	11	27	25	1	4	16	39	36
Judgment	0	0	6	37	24	0	0	9	53	34
Enthusiasm/High Energy Level	5	8	27	22	5	7	11	39	31	7
Adaptability	1	1	18	32	15	1	1	26	46	21
Organization Skills	0	4	18	28	17	0	6	26	40	24
Written Communication Skills	0	0	3	10	54	0	0	4	14	77
Technical Skills and Competence	1	0	4	28	33	1	0	6	40	47
Interpersonal Skills	4	14	13	18	17	6	20	19	26	24
Time Management	1	5	27	22	12	1	7	39	31	17
Team Work - Cooperation	4	8	24	24	7	6	11	34	34	10
Responsive to Customer Needs	0	0	3	12	52	0	0	4	17	74
Negotiation Skills	4	4	36	18	5	6	6	51	26	7
Proper Grammar	0	0	5	22	40	0	0	7	31	57
Typing Skills	0	0	6	35	26	0	0	9	50	37
Other - (60% responded 0)	1	1	3	2	3	1	1	4	3	4

The participants were also asked to choose from the list of 18 competencies the top three required competencies that telephone and Internet

customer service representatives should possess. Table 5 reveals the top three competencies chosen for telephone customer service representatives and Internet customer service representatives.

*Table 5. Top 3 Competencies for Telephone and Internet Customer Service Representatives*

<b>TELEPHONE CUSTOMER SERVICE</b>	<b>INTERNET CUSTOMER SERVICE</b>
1. Oral Communication Skills	1. Written Communication Skills
2. Interpersonal Skills	2. Written Communication Skills
3. Problem Solving	3. Responsive to Customer Needs

For Internet customer service, participants most frequently chose written communication skills as the “first” and “second” most important competency that a representative should possess when delivering customer service via the Internet.

Table 6 further outlines the frequencies and percentages of the top ranked competencies for telephone and Internet customer service representatives.

**Table 6. Frequencies and Percentages of the Top 3 Competencies for Telephone and Internet Customer Service Representatives**

Competencies	Telephone Representatives						Internet Representatives					
	Frequency			Percentage %			Frequency			Percentage %		
	1	2	3	1	2	3	1	2	3	1	2	3
Oral Communication Skills	24	10	10	34	14	14	4	3	3	6	4	4
Problem Solving	3	8	15	4	11	21	6	12	9	9	17	13
Decision Making	1	1	2	1	1	3	1	2	0	1	3	0
Sensitivity and Concern for Others	5	4	7	7	6	10	2	1	5	3	1	7
Dependability	1	3	3	1	4	4	1	3	3	1	4	4
Judgment	1	3	3	1	4	4	2	3	4	3	4	6
Enthusiasm/High Energy Level	2	3	3	3	4	4	0	0	0	0	0	0
Adapatability	1	1	0	1	1	0	1	0	2	1	0	3
Organization Skills	1	0	2	1	0	3	1	1	3	1	1	4
Written Communication Skills	0	0	0	0	0	0	29	14	8	41	20	11
Technical Skills and Competence	1	3	5	1	4	7	7	11	8	10	16	11
Interpersonal Skills	20	19	3	29	27	4	1	3	2	1	4	3
Time Management	0	0	0	0	0	0	0	1	2	0	1	3
Team Work/Cooperation	0	0	1	0	0	1	0	0	1	0	0	1
Responsive to Customer Needs	9	11	13	13	16	19	13	8	15	19	11	21
Negotiation Skills	0	0	0	0	0	0	0	0	0	0	0	0
Proper Grammar	0	1	2	0	1	3	0	7	3	0	10	4
Typing Skills	0	1	0	0	1	0	0	1	2	0	1	3
Other	1	1	0	1	1	0	2	0	0	3	0	0

A comparison of the data reveals that there was a difference in the competencies that were required for telephone customer service representatives and Internet customer service representatives. For telephone customer service, the primary means of communicating to the customer was oral communication whereas for Internet customer service, written communication was the primary means of communication. Given the type of delivery system used, these findings are obvious. However, in the telephone customer service section, written communication skills did not rate very high and oral communication skills did not rate very high for Internet customer service. Although the supporting

competencies for each delivery system are a little different, the findings of the study support the literature review.

For telephone customer service, the top competencies were oral communication skills, interpersonal skills and problem solving. However, even though these were the top ranking competencies, other competencies such as responsive to customer needs, negotiation skills, enthusiasm/high energy level and sensitivity and concern for others did not rank very high. All of these competencies were mentioned in the literature review as competencies that the telephone customer service representative should possess.

For Internet customer service the top three competencies were written communication, written communication and responsiveness to customer needs. Since most of the communication with the customer is done via E-mail, it is extremely important that the representative have excellent written communication skills. The findings are in accordance with the literature review. However, it is important to note that the following skills from the literature review: organization skills, problem solving, typing skills, and proper grammar were not rated very high by the participants.

Six competencies that did not rate very high in both categories were: sensitivity and concern for others, team work/ cooperation, decision making, negotiation skills, judgment and problem solving. Despite the delivery system, the representatives interact daily with customers and constantly utilize all of these skills.

Technical skills and competence did not make the top ranked competency list for Internet customer service. This is interesting when considering the delivery system.

Interpersonal skills ranked very high for telephone customer service representatives and ranked very low for Internet customer service representatives. Because interpersonal skills incorporate listening, this skill would not be applicable for a communication process that is primarily done through the written word.

## Chapter V

### Conclusions

The purpose of the study was to determine the competencies organizations consider most important for their telephone and Internet customer service representatives. The results of the study reveal that there is a distinct difference in the competencies required for telephone and Internet customer service representatives. Despite the difference in the delivery system, the competencies outlined in the literature review support the findings from this study. The findings would also seem to be an obvious conclusion but what is not so obvious is the other competencies that support the skills.

Communicating via the telephone is a primary medium in which an organization communicates to its customers. Therefore, excellent oral communication skills are essential. The tone, manner and fashion in which a customer is greeted and in which the problem is solved is critical to building a lasting relationship. Oral communication was the top competency chosen by participants. An analysis of the results reveal that some of the competencies required for telephone customer service representatives highlighted in the literature review were not rated as important by the participants. It is a combination of all competencies that creates a well-rounded representative and must be considered in a performance assessment.

The same holds true for Internet customer service representatives. The results reveal that the top competency for Internet customer service

representatives is written communication skills. All correspondence is done in writing thus shifting the focus to a different means of communication. The manner, tone, length, clarity, grammar and vocabulary in which a message is written can make or break a customer's image of an organization. It is critical that the representative properly composes the message and addresses the needs of the customer. As supported by the literature, the representative must be organized, proficient in typing, possess computer skills and be able to compose a message that a reader at any level can interpret and not find offensive. The results of the study reveal that the top three competencies are written communication, written communication and responsive to customer needs. They are important but it is a combination of all of the skills that creates a highly skilled and qualified customer service representative.

Significant implications and challenges can result if the organization does not pay attention to the development of these skills. The analysis of General Systems Theory provides the framework for understanding the importance of organization communication and that highly skilled and qualified representatives are required in order to provide quality customer service. Therefore, all competencies are an integral part of a telephone and Internet customer service representative's performance assessment. Due to the rapid growth in the customer service area, future research is recommended.

### Recommendations for Further Research

This study lays the foundation for determining what competencies organizations consider most important for telephone and Internet customer service representatives when completing a performance assessment. There are five suggestions for future research. The first suggestion is to pick a specific industry, such as banking, that utilizes the telephone and Internet to communicate to its customers. Collect samples of the organization's performance assessment for their customer service representatives. Compare the competencies on the performance assessment to the list of competencies compiled from this study. A cross comparison of the competencies will result in greater insight as to what competencies representatives are evaluated on and their degree of importance. A new performance assessment tool can be generated from this cross comparison and marketed to organizations specializing in telephone and Internet customer service.

To add to the marketability of the product, take this analysis one step further and use the competency list to evaluate how organizations go about training the representatives in the competencies in which they are evaluated. This list will provide insight to the areas in which representatives may need further training and development. Trained customer service representatives are going to be the key to customer retention and can not be overlooked.

A second suggestion would be to send the survey to three or four different industries and target managers of the customer service department to fill out the

survey. A comparison of competency by industry could also add invaluable insight to customer service.

A third area for recommended research would be to lengthen the survey, and ask the rater to expand on what skills, behaviors and abilities are necessary to demonstrate each competency. This will offer greater insight as to what differences there may be in the competencies. Even though the competency could be the same for telephone and Internet, the skills, behaviors and abilities needed to perform the competency could be different.

The fourth suggestion for future research would be to survey customers and find out exactly what they expect from the organization's customer service representatives. The survey would include finding out what the customer's experiences and expectations are of an organization, along with determining which competencies the representatives should be proficient.

The fifth and final suggestion for future research incorporates three steps and targets the rapidly growing area of customer service via the Internet. Because of the Internet's rapid growth, there is an increasing need to uncover what skills these representatives must possess. To communicate with a customer via the Internet, the customer service representative's message must be carefully composed and free of grammatical errors. First, researching how organizations go about initially hiring representatives for this type of position, what types of tests they administer at application, and the skills and level of proficiency that is required to perform the job. The second step encompasses evaluating what type of

training is in place for Internet customer service representatives. An analysis of existing training programs uncovers what competencies organizations are training their representatives on and pinpoints areas for further development. Step three measures the effectiveness of the training. The goal here is to evaluate if there is transfer of training along with assessing which competencies need further development and attention.

The purpose of this study was to identify the core competencies considered most important by organizations for customer service representatives when using the telephone and Internet. With the rapid growth in the customer service area, information as to how to better assist the customer is invaluable. First, organizations must have excellent internal systems. They must work toward building an excellent rapport with their employees. A winning relationship internally helps establish a positive external relationship with an organization's customer. The customer service representatives are the employees that are working to build this relationship. The competencies of the customer service representatives must be strengthened and refined. By focusing on these competencies and meeting customer demands, the end result is quality customer service that maximizes customer retention.

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Appendix A:

**Pilot Study Participants**

## Appendix A

### Pilot Study Participants

1. Diane Mashia  
Paychex Inc.  
911 Panorama Trail  
Rochester, NY 14625
2. Scott Murphy  
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500 Canal View Boulevard  
Rochester, NY 14623
3. Lauren Spiker  
Lead  
70 Linden Oaks  
3<sup>rd</sup> Floor  
Rochester, NY 14625
4. Karla Verdi  
Paychex Inc.  
911 Panorama Trail  
Rochester, NY 14625

**Appendix B:**

**First Draft of Customer Service Competency Survey**

## Appendix B

### FIRST DRAFT OF CUSTOMER SERVICE COMPETENCY SURVEY

PERMISSION TO PARTICIPATE IN THIS STUDY IS GRANTED BY COMPLETING THIS SURVEY.

**Section 1.** What competencies do you evaluate when completing a performance assessment for a representative implementing high quality customer service via the telephone?

(Please rate the competencies listed below with 5 being the highest and 1 the lowest.)

- \_\_\_\_\_ oral communication skills
- \_\_\_\_\_ problem solving
- \_\_\_\_\_ decision making
- \_\_\_\_\_ sensitivity and concern for others
- \_\_\_\_\_ dependability
- \_\_\_\_\_ judgment
- \_\_\_\_\_ enthusiasm/high energy level
- \_\_\_\_\_ adaptability
- \_\_\_\_\_ organization skills
- \_\_\_\_\_ written communication skills
- \_\_\_\_\_ technical skills and competence
- \_\_\_\_\_ interpersonal skills (flexibility and listening)
- \_\_\_\_\_ time management skills
- \_\_\_\_\_ team work/cooperation
- \_\_\_\_\_ responsiveness
- \_\_\_\_\_ negotiation skills
- \_\_\_\_\_ proper grammar
- \_\_\_\_\_ typing skills
- \_\_\_\_\_ other

Please select from the list above the first, second and third most important competency required for a representative implementing customer service via the telephone.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Section 2.** What competencies do you evaluate when completing a performance assessment for a representative implementing high quality customer service via the Internet?

(Please rate the competencies listed below with 5 being the highest and 1 the lowest.)

- \_\_\_\_\_ oral communication skills
- \_\_\_\_\_ problem solving
- \_\_\_\_\_ decision making
- \_\_\_\_\_ sensitivity and concern for others
- \_\_\_\_\_ dependability
- \_\_\_\_\_ judgment
- \_\_\_\_\_ enthusiasm/high energy level
- \_\_\_\_\_ adaptability
- \_\_\_\_\_ organization skills
- \_\_\_\_\_ written communication skills
- \_\_\_\_\_ technical skills and competence
- \_\_\_\_\_ interpersonal skills (flexibility and listening)
- \_\_\_\_\_ time management skills
- \_\_\_\_\_ team work/cooperation
- \_\_\_\_\_ responsiveness
- \_\_\_\_\_ negotiation skills
- \_\_\_\_\_ proper grammar
- \_\_\_\_\_ typing skills
- \_\_\_\_\_ other

Please select from the list above the first, second and third most important competency required for a representative implementing customer service via the Internet.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Section 3: Background Information - OPTIONAL**

The information that you provide in this section is completely confidential and will be used for research purposes only. Please answer each question by putting an X next to the answer that most closely describes you or fill in the blank. Please provide only one response for each question.

1. What is your gender?
  - A. Male
  - B. Female
  
2. How do you describe yourself?
  - A. American Indian, Native American, Inuit or Aleut
  - B. Black or African American
  - C. Mexican American or Chicano
  - D. Oriental or Asian American
  - E. Puerto Rican
  - F. Other Hispanic or Latin American
  - G. White
  - H. Other (please specify)
  
3. How many years have you worked in customer service?  
\_\_\_\_\_

\*\*\* The results of this study will be shared with participants who request them.

**Appendix C:**

**Final Draft of Customer Service Competency Survey**

## Appendix C

### FINAL DRAFT OF CUSTOMER SERVICE COMPETENCY SURVEY

PERMISSION TO PARTICIPATE IN THIS STUDY IS GRANTED BY COMPLETING THIS SURVEY.

**Section 1.** Of the following competencies, which do you consider important and evaluate when completing a performance assessment for a representative providing high quality customer service via the telephone?

Use the following scale when considering their degree of importance:

- 5 = Very important
- 4 = Important
- 3 = Somewhat important
- 2 = Of little importance
- 1 = Not important

- \_\_\_\_\_ oral communication skills
- \_\_\_\_\_ problem solving
- \_\_\_\_\_ decision making
- \_\_\_\_\_ sensitivity and concern for others
- \_\_\_\_\_ dependability
- \_\_\_\_\_ judgment
- \_\_\_\_\_ enthusiasm/high energy level
- \_\_\_\_\_ adaptability
- \_\_\_\_\_ organization skills
- \_\_\_\_\_ written communication skills
- \_\_\_\_\_ technical skills and competence
- \_\_\_\_\_ interpersonal skills (listening)
- \_\_\_\_\_ time management skills
- \_\_\_\_\_ team work/cooperation
- \_\_\_\_\_ responsive to customers needs/questions
- \_\_\_\_\_ negotiation skills
- \_\_\_\_\_ proper grammar
- \_\_\_\_\_ typing skills
- \_\_\_\_\_ other

Please select from the list above the first, second and third most important competency required for a representative implementing customer service via the telephone.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Section 2.** Of the following competencies, which do you consider important and evaluate when completing a performance assessment for a representative providing high quality customer service via the Internet?

Use the following scale when considering their degree of importance:

5 = Very important

4 = Important

3 = Somewhat important

2 = Of little important

1 = Not important

- \_\_\_\_\_ oral communication skills
- \_\_\_\_\_ problem solving
- \_\_\_\_\_ decision making
- \_\_\_\_\_ sensitivity and concern for others
- \_\_\_\_\_ dependability
- \_\_\_\_\_ judgment
- \_\_\_\_\_ enthusiasm/high energy level
- \_\_\_\_\_ adaptability
- \_\_\_\_\_ organization skills
- \_\_\_\_\_ written communication skills
- \_\_\_\_\_ technical skills and competence
- \_\_\_\_\_ interpersonal skills (listening)
- \_\_\_\_\_ time management skills
- \_\_\_\_\_ team work/cooperation
- \_\_\_\_\_ responsive to customers needs/questions
- \_\_\_\_\_ negotiation skills
- \_\_\_\_\_ proper grammar
- \_\_\_\_\_ typing skills
- \_\_\_\_\_ other

Please select from the list above the first, second and third most important competency required for a representative implementing customer service via the Internet.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Section 3: Background Information - OPTIONAL**

The information that you provide in this section is completely confidential and will be used for research purposes only.

1. How many years have you worked in customer service?  
\_\_\_\_\_

\*\*\* The results of this study will be shared with participants who request them.

\*\*\*\*\* THANK YOU FOR YOUR PARTICIPATION \*\*\*\*\*

**Appendix D:**

**Invitation to Participate in Study**

## Appendix D

### Invitation to Participate in Study

I am a graduate student in Human Resource Development who is conducting a research project on customer service competencies. The purpose of the study is to identify the core competencies considered most important by organizations for customer service representatives when using the telephone and Internet. In addition, the data will be analyzed to determine if there is a difference between the core competencies required for telephone and customer service representatives and Internet customer service representatives.

If you are interested in completing a questionnaire for the study, please E-mail me at [ghrd583@sjfc.edu](mailto:ghrd583@sjfc.edu) and please be sure to include your E-mail address. The questionnaire will be forwarded to you. Results of the study will be shared with participants who request them. I look forward to hearing from you.

**Appendix E:**  
**Follow up E-Mail Message**

## Appendix E

### Follow up E-mail Message

Recently you were forwarded a survey on Customer Service Competencies. If you are still interested in participating in the study please forward the completed survey by Friday February 26, 1999. Thank you.

**Appendix F:**

**Study Approval Form From Institutional Review Board**

APPENDIX F

Decision of Institutional Review Board

Approved

Not Approved

Comments: How will participant identification be  
handle to assure confidentiality? Include a comment  
about this in your final proposal. Good luck!  
see other comments on the proposal.

- No Research      The proposed project has not research component and does not need be in further compliance with Article 24-A.
- No Risk            The proposed project has a research component but does not place subjects "At Risk" and need not be in further compliance with Article 24-A.
- Research & Risk    The proposed project has a research component and places subjects at risk. The proposal must be in compliance with Article 24-A.

Cynthia Rice McCloskey  
Chairperson, Institutional Review Board

12/17/98  
Date

Expelled Review Committee member  
Monica D. Cherry

December 16, 1998